

Agenda

1. Call to Order and Roll Check

Presenter: Board Chair Rebecca Dyson

2. Land Acknowledgment

Presenter: Board Chair Rebecca Dyson

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

Presenter: Board Chair Rebecca Dyson

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

Presenter: Board Chair Rebecca Dyson

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Presenter: Superintendent Joseph Hattrick

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A. <u>AHS Student Report</u>	
Presenter: AHS Co-Presidents Owen Taylor and Ella Robinson	
B. <u>OSEA Report</u>	
Presenter: OSEA Board Member James Johnson	
C. <u>AEA Report</u>	
Presenter: AEA Board Representative Alan Parowski	
8. Board Reports	
Presenter: Board Chair Rebecca Dyson	

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. Student Board Representative Report

Presenter: Student Board Reps Owen Taylor and Azaleah Davis Powell

11. Superintendent Report

Presenter: Superintendent Joseph Hattrick

A. ACTION ITEM: Resolution Recognizing May 5-9, 2025, as Teacher Appreciation Week. **136**

B. 2025-26 Budget Restructuring Plan (Phase II) **137**

12. Finance Report

Presenter: Director of Business Services Sherry Ely

A. Finance Report for April 2025 **155**

13. Unfinished Business

A. ACTION ITEM: Integrated Application Plan (IAP) **161**

Presenter: Ericka Beck-Brattin

14. New Business

15. Announcements and Appointments

A. The Budget Committee will hold Budget 101 Orientation on Wednesday, April 16, 2025 at 7:00 PM in the District Office Conference Room, 885 Siskiyou Blvd., Ashland, OR.

B. The Board will convene a Work Session on Thursday, April 24, 2025, at 7:00 pm via Zoom.

C. The Budget Committee will hold it's first meeting on Wednesday, May 7, 2025 at 7:00 PM in the District Office Conference Room, 885 Siskiyou Blvd., Ashland, OR.

D. The Board will hold its next Regular Session on Thursday, May 8, 2025, at 7:00 PM in the City Council Chamber, 1175 E. Main Street, Ashland, OR.

16. Adjourn

MINUTES

1. Call to Order / Roll Check

Chair Dyson called the meeting to order, and a roll check confirmed that the following members were present for the candidate information session: Directors Ruby, Skuratowicz, Hatch, and Dyson.

2. Opening Remarks

Chair Dyson welcomed the public, which consisted of approximately 20 people. She reviewed the various OSBA resources for board members and played the OSBA video, "What Do School Board Members Do?"

A. Board Presentation

Chair Dyson shared the Ashland School Board Prospective Candidate slide deck, highlighting the following topics:

- Strategic Goals/ Guiding principles, which will be updated in the 2025-26 school year
- Roles of the school board
- Time commitment
- Having a district-wide vision, which is not always what is best for your own child
- How to file as a board candidate; March 20, 2025, is the filing deadline

3. Q & A

After the presentation, board members turned to face the audience for an informal Q&A. Information shared included:

- 4-year volunteer terms
- Campaign resources and advice
- AAUW will host a School Board Candidates Forum on Sunday, May 4, 2025, from 2:00 to 4:00 p.m. in the AHS Theater/Auditorium. All candidates who have filed will be invited to answer prepared questions and take audience questions.
- Overview of time commitments for board members, including retreats
- Confidentiality, ethics
- Public meeting law
- Individual board members are 1/5 of a vote
- Public exposure
- Board members expressed encouragement to anyone interested in becoming a board member.

4. Adjourn

Chair Dyson thanked the community for coming and adjourned the meeting at 7:02 PM.

Submitted by:
Holly Rosser, Board Secretary

Dated for Board Approval: April 10, 2025

Minutes

1. Call to Order and Roll Check

Chair Dyson called the meeting to order, and a roll check confirmed that all members were present. Directors Franko, Ruby, Skuratowicz, Hatch, and Dyson were present in person.

2. Land Acknowledgment

Student Board Representative Owen Taylor read the Land Acknowledgment.

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

Chair Dyson asked that the following items be added to the agenda: ELA Curriculum Adoption and Resolution 2024.2025 B-1.

Motion: Director Skuratowicz moved, and Hatch seconded this amendment to the agenda, and the amended agenda was approved by a unanimous vote of the five directors.

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

- ❖ **Motion:** Director Franko moved, and Hatch seconded approval of the consent agenda as presented. The motion carried by unanimous vote of the five members present.

- A. Approval of Minutes
- B. Personnel Report for March 2025
- C. Resolution 25-26- 01HR
- D. Enrollment Report for March 2025
- E. Furlough Day OSEA-ASD MOU
- F. AEA Behavior Analyst MOA

5. School Presentation: TRAILS Outdoor School

TRAILS Principal Ericka Beck-Brattin, TRAILS teacher Marcia Osoke, and Ashland Connect teacher Amanda Groover shared highlights and updates about their programs.

Ashland Connect serves 25 students using a hybrid learning model. Ashland Connect teacher, Amanda Groover, serves all the students in this program. Students attend classes online and two days a week at TRAILS. A grandmother of one student shared a heartfelt testimony about how much the program has helped her grandson after he struggled to reintegrate following the COVID-19 pandemic. Amanda shared videos of Ashland Connect students doing activities together and thriving. One Ashland Connect family made a video to express their immense gratitude for the hybrid learning program at Ashland School District.

TRAILS student Zenyn shared a PowerPoint presentation about MLK, highlighting the social justice work students are doing at TRAILS.

TRAILS 7th-8th grade teacher Marcia Osoke introduced TRAILS as a “Choice School” in the district, focusing on getting students outside. This program has been offered in the district for almost 20 years. TRAILS students participate in several activities, many of them funded by grants. A recent grant provided them with a new water filter for their base camp at Earth Teach and a food dehydrator for dehydrating provisions for backpacking trips. Preparedness, prevention, and safety are integrated throughout the curriculum at every grade level, fostering resilience that culminates in outdoor exploration and achievement in the 8th grade.

8th-grade students Alma and Teo Galicia shared highlights of their educational opportunities at TRAILS. 7th and 8th graders recently used physics to build catapults and trebuchets; used waffles to understand linear equations; and hiked Mt. McLaughlin using elevation charts and stride measurements to factor pacing strategies; they’ve tested camp stoves, sleeping bags, and sleeping pads for quality, efficiency and cost; in 8th grade each student presents a capstone project that leaves a lasting mark in the community. Past projects have included welding a bike, creating a video game, an afterschool art club, dance for women's empowerment, FOTAS work, Rogue Climate paintings, and a food waste audit.

6. Computational Thinking Project

Helman teachers Anne Collonge and Trish Dorr delivered a presentation about their work on the Computational Thinking (CT) Project. This project is sponsored by the Southern Oregon Computer Science (SOCS) for All initiative, where a group of teachers from around the region are developing curriculum using CT concepts in their classrooms. Computational Thinking can be used to solve problems, accomplish large and complex tasks, and organize and understand information in all content areas, not just computer science.

ODE is developing a computer science education plan for K-12 students, which will begin in the 2027-2028 school year. The work that Anne and Trish have done puts ASD ahead of the game. We now have teachers with experience in these lessons and research-based curricula to offer.

Anne and Trish donned glitter jackets and handed out prize candy, leading the school board in a lively game of Jeopardy to learn about the work SOCS for All has been doing to promote CT learning in the state.

7. Recurring Reports

A. AHS Student Report

AHS Co-Presidents Owen Taylor and Azaleah Davis Powell congratulated multiple student achievements over the last month; AHS Ski Teams went to state; Leadership is working on March Madness for high school basketball; Prom is on May 3; next blood drive is May 6, AHS DECA students did well in Portland; several DECA students will be going to nationals.

B. OSEA Report

OSEA Board Member James Johnson reflected on Classified Employee Appreciation Week and shared that at AMS, teachers took over lunch duties so that the classified staff could enjoy lunch together.

C. AEA Report

AEA Board Representative Alan Parowski reported a long list of highlights and happenings at each school in the district. All schools reported on the ways they showed their appreciation during classified employee appreciation week; Bellview and TRAILS boasted their OBoB accomplishments; Ashland Connect received a few new students; AMS will host a school dance on April 11; May Fair preparations are underway at Hellman; there is a talent show coming up at Walker; Pi Day will be celebrated at Willow Wind.

8. Board Reports

Chair Dyson reported on the good turnout for the board candidate information session. She attended the ASF board meeting, where they are planning a fund drive in April. Dr. Dyson is committed to protecting the rights and safety of all students and shared the following personal statement:

“I know there is a lot of concern and uncertainty in the community regarding the many orders coming from the Federal government and the potential impact on our district. First, I will say as an individual that I would like to someday be able to share the story of how I got my name, Rebecca, but suffice it to say that it is in itself a statement against not only injustice but against keeping quiet in the face of injustice. In recognition of my mother who defied her heritage in giving me this name, and in honor of all those who have lost anything and everything because not enough people spoke up or took action against injustice, I want to assure everyone who hears this that I as an individual and we as a board are fully committed to protecting the rights and safety of our students and staff.”

Following her statement, Chair Dyson read the following Statement from the School Board:

“In the face of rapidly changing directives from the Federal government which are often in direct conflict with Oregon State statutes, the Board of Directors of the Ashland School District would like to reinforce that Ashland School District will continue to follow Oregon law supporting equitable treatment of all students and that we will remain true to the vision and ideals that have always guided this district. We will not alter our legal and moral responsibility to serve and protect every student and staff member in our district. We will continue to follow our mission of providing a safe and welcoming space for all students regardless of race, religion, gender, or identity. We will continue to strive for equity in all areas and to respect and value every student who relies on this district for their education in and beyond the classroom. We are proud and grateful to be members of this extraordinary community that is Ashland, and we will continue to embody the ethic and integrity for which Ashland stands.”

Director Ruby supports Dr. Hattrick’s vision that we become the #1 district in the state. He reported that AHS is ranked in the top 10% of public high schools in Oregon and that our students’ academic achievement has increased over the past 30 years. The district's regular attendance rate and enrollment were noted as areas of improvement. Director Ruby highlighted the work he does as part of the OSBA LGBTQ2S+ Advisory Committee. This group works to ensure the safety and security of our most vulnerable students. He emphasized his unwavering support and the district’s commitment to protecting the rights of all students. Mr. Ruby enjoyed volunteering for the school-wide OBoB competition at TRAILS, a valuable extracurricular activity that has proven to improve academic performance. He is excited to be on the Future Climate Collective board that is piloting climate literacy curriculum in Portland public schools and advocating for the adoption of climate standards statewide.

Director Skuratowicz focused her time on advocating for the upcoming school board elections. She attended the information session that OSBA held in Medford and spoke with potential candidates there. She was pleased with the turnout at the candidate info session for ASD and has met with five people who are interested in running. AAUW will host a Candidates Forum on Sunday, May 4, in the AHS theater.

She continues her research on chronic absenteeism, which is not just an issue in Oregon; it's a national issue.

Director Hatch is excited about the rising interest in running for the School Board. He hopes the energy to volunteer within the school community continues even after the election. He picked up the new willow tree for Willow Wind.

Vice Chair Franko shared her gratitude for our community, where folks prioritize putting kids first. She is humbled by the many offers of support.

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.*)

None

10. Student Representative Report

AHS Student Representatives Owen Taylor and Azaleah Davis Powell reported that applications have gone out to find their replacements for School Board Student Representatives. Leadership is taking applications for new members. Azeleah is running a segment on applying for school board student rep in the Rogue News.

11. Superintendent Report

Dr. Hattrick was pleased to announce Ashland High School's Rotary Student of the Month, Jes Jeranko. Jes is known for her kindness, leadership, and dedication to the school community. She is an essential part of the AHS theater program and is currently performing in Little Women. Her efforts in organizing the Homecoming Week teacher dance strengthened school culture by creating an environment where students and staff felt a sense of connection. Jes leads not by seeking recognition, but by being the kind of person others aspire to be. She is a shining example of what it means to lead with kindness, talent, and dedication.

Superintendent Hattrick introduced Holly Rosser as the new Board Secretary and commended her for her quick onboarding. Dr. Hattrick notified the board of an out-of-state field trip to Yreka for the AHS softball team on March 21. He gave a shout-out to the fantastic classified staff, who have been celebrated at their various sites all week.

At the recent AASA conference, Dr. Hattrick was impressed by the AI education platform created by Colin Kaepernick. Dr. Hattrick is in communication with Mr. Kaepernick regarding the potential use of the program in our district. A few days later, on March 11, Dr. Hattrick represented the COSA Equity Board, which teamed up with the OSBA School Board Members of Color Caucus, and advocated at the first "Education Leaders of Color Advocacy Day." They lobbied for support for the Governor's recommended state school fund budget of \$11.36 billion and to increase the special education funding cap from 11% to at least 15%. He encouraged the board to attend the OSBA Advocacy Day in Salem on April 24.

Superintendent Hattrick enjoyed being featured in this month's OLLI podcast. He continues to engage with thirty-five parents and community members at the monthly Superintendent Advisory Council

meetings. The Leadership Team continues to collaborate on proposals aimed at increasing efficiency. Dr. Hattrick reaffirmed his commitment to transparency in the decision-making process.

Superintendent Hattrick delivered the following Statement of Commitment to All Within Our Community:

“Tonight, I want to take a moment to reaffirm something that is at the heart of everything we do in the **Ashland School District**—our unwavering commitment to **every** student, **every** staff member, and **every** family in our community. We welcome All...as you are!

We are committed to ensuring **every person who walks through our doors deserves to feel safe, valued, and seen for who they truly are**. While the world outside our doors may feel scary and confusing at times, at the Ashland school district, we want you to know that you are valued and you are loved. Of course, we have policies that guide our work around how to treat people; but more importantly, it is our shared responsibility to bring these commitments to life in our classrooms, hallways, and workplaces every single day.

We know that equity is not about policies—it’s about **people**. It’s about ensuring that each student, no matter their background, race, gender identity, ability, or circumstance, has the support and opportunities they need to thrive. It’s about uplifting **our staff** so they can do their best work in an environment where they feel respected and valued. It’s about partnering with **our families** to create a community where every child feels a sense of belonging.

As we move forward, we do so with intention, using compassion and love to remove barriers, challenge inequities, and create spaces where all voices are heard. This is not just a goal—it is a promise. A promise that in the Ashland School District, **every student belongs, every staff member matters, and together, we will continue to build a future where everyone has the opportunity to succeed**.

Thank you for being part of this work, this district, and thank you for standing with us in our commitment to **equity, inclusion, and belonging** for all. I am personally thankful and proud to live, and lead in the Ashland School District Community! “

12. Bond Report

Executive Director of Operations Steve Mitzel began the presentation by reviewing the early work package, which was part of Amendment 1 - a contract for \$1,089,604.70 to Outlier Construction Co. for the Science Building Seismic Rehabilitation Project at Ashland High School. The board approved the award of Amendment 1 at the special session held on February 27, 2025. That work has now begun.

The team is working on Amendment 2, which is time-sensitive to secure contractors within the project timeline. Amendment 2 will be presented at the March 20 special session meeting and is expected to be the final amendment recommendation for the Seismic Rehabilitation Project.

A. Monthly Report March 2025

HMK Project Manager, Josh Whitaker, reviewed the Capital Bond Program Report for February with the board. There are still active projects ongoing at the high school. They are completing the modernization project on the Humanities Building and initiating the seismic rehabilitation project on the Science Building. Fencing will be going back up as they demo and excavate. In June, the quad will undergo a hardscape renovation that will beautify the area and protect the large redwood tree. The project is expected to be completed in August.

13. Finance Report

A. Finance Report as of March 2025

Director of Business Services, Sherry Ely, reviewed the fiscal report on financial data as of February 28, 2025. Revenues and Expenditures are reported for the General Fund #100 only.

Director Ely reported that we are seeing a projected decrease in local revenues due to property taxes and the YAAL coming in lower than budgeted. Property Taxes and the State School Fund are tied together, so if property taxes come in higher or lower, an adjustment will be made in May of 2026. She estimates that the district will receive approximately \$800,000 in SOESD flow-through. All this will be taken into consideration when budgeting for 2025-2026.

The primary issue for the General Fund this year is the starting balance of a negative \$2,004,187. This also results in a projected negative Ending Fund balance of \$2,638,059. The district has implemented measures that are resulting in a reduction of expenses for this school year. Director Ely anticipates there will be additional savings as we refine the projections and continue the trend of reducing expenditures.

To get a clearer picture of the district's financial situation, Director Ely recreated the 2022-23 and 2023-24 budgets and used those numbers to create a 2-year average trend, which she is using to project associated payroll costs and purchased services for the rest of 2024-25 and build the 2025-26 budgets. Director Ely's goal is to create an accurate budget for 2025-26 that aligns with projected revenues and actual expenses.

During the lookback, Director Ely revealed that the district had been overspending on ESSER, transportation, and food services. She also reported that the district did not allocate sufficient funds for insurance (associated payroll costs) in this fiscal year.

Director Ely reviewed the 2024-25 action plan, which aims to save \$2.2 million. So far, the district has saved nearly \$800,000 in furloughed days and received almost \$900,000 from a very generous anonymous donor. These, along with the measures in place to reduce expenses in this fiscal year, are getting us closer to the goal. Director Ely will review the district's progress toward this goal at the April meeting.

Board members requested a financial report that included the special revenue funds, in line with the format provided by Jackie Olsen, Executive Director of the Oregon Association of Business Officials.

Director Ely recommended that the board consider a Full Faith and Credit loan to bridge us until we can rebuild the ending fund balance. A resolution to allow the district to apply for a loan is on the agenda. The resolution also gives the District the authority to enter into a Tax Anticipation Note (TAN) if that is determined to be the more feasible option. A TAN is a short-term loan that districts can enter into, but it must be repaid within 13 months.

Board members expressed gratitude for the challenging work Director Ely is doing.

A. Resolution 2024.2025 B-1

Sherry Ely, Director of Business Services, explained the two components of the resolution: a short-term borrowing option and a full faith and credit option. The resolution does not mean the district is borrowing money; it's a necessary legal step the district needs to take to be able to explore loan options with lenders.

Director Ely explained that interest rates will be determined once the district goes out to market. A Full Faith and Credit loan can be amortized over a longer period, which would allow the district the necessary time to get its finances back to a more stable position, as the debt service payments would be lower than those required for the shorter TAN borrowing option.

- ❖ **Motion:** Director Franko moved, and Director Skuratowicz seconded, to approve Resolution 2024.2025 B-1, which allows the Ashland School District to seek either a Full Faith and Credit loan or a Tax Anticipation Note, up to \$10 million, to address cash flow needs. The motion carried by unanimous vote of the five members present.

2. ELA Curriculum Adoption

ELA Curriculum Adoption team members, Christine McCollum, Caitlyn Olson, and Ashley Schwedes, presented their process and recommendations for the K-5 ELA Curriculum for Ashland School District. The entire team of thirteen consisted of teachers, coaches, reading specialists, and administrators from all elementary schools in the district. Over the course of six months, the group researched and developed a rubric that enabled them to examine each of their curriculum samples for deep background knowledge and explicit instructions on the components of reading. In February, the team finalized its recommendations and provided multiple opportunities for public review and feedback, including notices and links on the district website. The team reported that all input thus far has been positive.

With excitement about this new curriculum, the team recommends that the board adopt the state-recommended EL Learning for ELA core modules, paired with 95% Group's Core Phonics for explicit reading skills, which is not included in the state's recommendation list.

Ms. McCollum explained that the two years' worth of the Early Literacy Grant will cover the cost of all ELA materials for the first year. Recurring costs will be student workbooks, but the schools will assess the need after the first year and only order workbooks if they are being used. Licensing fees for the 95% Group are included in the first year, and then \$75 per teacher is due in subsequent years.

Director Skuratowicz mentioned that she was not aware of any public viewing opportunities and requested that the team allow at least one more chance for public input before the board makes a motion to adopt the curriculum. Ms. McCollum agreed to create an additional event that would invite all board members and requested that the ELA Curriculum adoption be placed on the March 20 Special Session agenda due to the time-sensitive nature of ordering the materials to arrive before the end of the school year.

3. Unfinished Business

None

4. New Business

A. ACTION ITEM: Budget Calendar for 2025-2026 Budget Year

Director of Business Services, Sherry Ely, presented the Calendar for the 2025-2026 Budget Year. Meetings are moved as far back as possible to allow more time for information to flow down regarding federal and state funding.

- ❖ **Motion:** Director Hatch moved, and Director Skuratowicz seconded the motion to approve the 2025-2026 Budget Calendar as presented. The motion carried by unanimous vote of the five members present.

B. ACTION ITEM: 2025-2026 School Calendar

Assistant Superintendent Michelle Cuddeback presented the 2025-2026 School Calendar for review and approval. Calendar changes included:

- One unified K-12 School Calendar
 - Two conference days in fall and spring for K-8, instead of three
 - Rearranging inservice days; fewer inservice days in August, added inservice to October and November
 - Minimize the number of short weeks in the school year; it is better for learning and less food waste
 - High School Graduation will be on June 5th, 2026
- ❖ **Motion:** Director Hatch moved, and Director Skuratowicz seconded, to approve the 2025-2026 School Calendar as presented. The motion carried by unanimous vote of the five members present.

C. ACTION ITEM: 2024-25 Superintendent Evaluation

Chair Dyson read the 2024-2025 Superintendent Evaluation Summary:

"In his first months with the Ashland School District, Superintendent Hattrick has demonstrated strong and effective leadership, particularly in the areas of financial management, transparency, and community engagement, setting the district on a much-needed positive trajectory. While much of Dr. Hattrick's focus has by necessity been on stabilizing the district amid financial challenges, he has also laid the groundwork for future progress in instructional leadership, interdistrict and community collaboration, and continued commitment to equity and excellence within our schools. The Board has witnessed positive changes in district culture and staff morale, and Superintendent Hattrick's commitment to community engagement has been widely recognized. While challenges remain, trust in leadership has increased, and a sense of optimism is growing. With continued attention to academic achievement, collaborative partnerships, and long-term financial sustainability, the district is well-positioned for growth and success under Superintendent Hattrick's leadership."

- ❖ **Motion:** Director Franko moved and Director Skuratowicz seconded to accept the superintendent's evaluation as presented. The motion carried by unanimous vote of the five members present.

5. Announcements and Appointments

Chair Dyson read the announcements of upcoming meetings.

6. Adjourn

There being no further business, Chair Dyson adjourned the meeting at 10:17 pm.

Submitted by:
Holly Rosser, Board Secretary

Dated for Board Approval: April 10, 2025

DRAFT

Minutes

1. Call to Order / Roll Check

Chair Dyson called the meeting to order, and a roll check confirmed that the following members were present on Zoom: Vice Chair Franko, Director Ruby, Director Skuratowicz, Director Hatch, and Board Chair Dyson. Director Ruby joined the Zoom meeting late. All board members were in attendance.

2. Adoption or Adjustment of Agenda

There were no additions to the agenda.

- ❖ **Motion:** Vice Chair Franko moved, and Director Skuratowicz seconded to adopt the agenda as presented. The agenda was approved by a unanimous vote of the five directors.

3. ACTION ITEM: Recommendation to Award a Contract Amendment 2 for \$2,342,372.58 to Outlier Construction Co. for the Science Building Seismic Rehabilitation Project at Ashland High School.

Executive Director of Operations Steve Mitzel made a recommendation to award a contract amendment of \$2,342,372.58 to Outlier Construction Company for the seismic rehabilitation project of the science building at Ashland High School. To stay on track with the timeline, this item will be presented at the work session. However, Director Mitzel will review the details again during the regular monthly bond report at the April 10 regular session meeting.

Director Mitzel summarized the contract amendment process by reviewing the early work packages, the rigorous bid process, and the importance of securing materials and contractors in a timely fashion. The amendment of \$2,342,372.58 is the final amendment, bringing the total project grant not to exceed \$3,478,651.96. Any future award requests would require a change order and reallocation of bond funds.

Director Mitzel shared next steps for the project, which will include fencing off many sections of the quad for the remainder of the school year. There will be clear paths and instructions so that staff and students can safely navigate to their classrooms. They are working closely with an arborist to ensure the safety and survival of the redwood tree in the high school quad. The new design will include permeable pavers to allow water to reach the tree's roots. Many other improvements will be enjoyed, with added shade and seating. The project is expected to be completed by the end of summer break.

- ❖ **Motion:** Vice Chair Franko moved, and Director Hatch seconded to approve awarding Amendment 2, in the amount of \$2,342,372.58, to Outlier Construction Co. for the Science Building Seismic Rehabilitation Project at Ashland High School. Amendment 2 was approved by a unanimous vote of the five directors.

4. ACTION ITEM: K-5 ELA Curriculum Adoption

Principal Christine McCollom presented the ELA Curriculum Adoption Team's recommendations for ELA curriculum at the March 13 regular session. To allow ample opportunity for community input, the board requested that the curriculum adoption team provide an additional viewing, review, and feedback session, which took place at Bellview School on Tuesday, March 18. Ms. McCollom reported that feedback has been very positive.

The ELA curriculum committee is seeking board approval for the district to adopt EL Learning combined with 95% Group during the special session meeting because ordering the materials is time sensitive to get the supplies before the end of the school year, with an orientation to the new curriculum in August.

The team recommends a curriculum that combines elements from two publishers. EL Learning is the top choice for ELA core modules, and 95% Group's Core Phonics program offers a better explicit reading curriculum. The combined curriculum encompasses core texts, supplemental materials, and digital options, catering to the diverse needs of all teaching and learning styles. Ms. McCollom believes that these choices provide a solid foundation for new teachers.

Board members thanked the Curriculum Adoption Team for their work and mentioned the importance of having a consistent curriculum across the district.

- ❖ **Motion:** Director Skuratowicz moved, and Director Hatch seconded, to adopt EL Learning and 95% Group as the K-5 ELA Curriculum for Ashland School District, as recommended by the curriculum committee. The curriculum choice was approved by a unanimous vote of the five directors.

5. Board Policy Review Process

The board reviewed the process for presenting policies to the board for reading and discussion, as outlined in Policy BFC Adoption and Revision of Policies.

Unless a policy requires immediate adoption, the board will follow the following process:

1. Review policies during a work session
2. Do the research and answer questions
3. At the next regular session meeting, present policies with proposed edits as part of the consent agenda

4. Before the next regular session, public comment may be given to the board chair
5. At that time, the board could request more input as an order of business on the following meeting agenda
6. If no additional action is required, the second reading and call for adoption would take place at the following regular session meeting, as part of the consent agenda

The board directed Dr. Hattrick to outline who has the authority to deem a policy urgent and learn if there is an Oregon Statute that outlines why a policy would need to be urgently approved. If appropriate, add that language to Policy BFC.

6. Board Processes

The board discussed best practices for communication strategies.

Superintendent Hattrick finds value in meeting with board members regularly. He is available for one-on-one meetings with board members at any time; board members do not have to wait for a Friday time slot. We have increased the Friday Superintendent/Board Member meeting time slot to weekly, and we will reserve that space for continuity and predictability. Reach out to Holly to schedule meetings as needed.

7. Other Items of Interest

Vice Chair Franko announced that she has withdrawn her name from the candidate list and will not be running for school board.

Director Skuratowicz shared the tradition of having treats at the last board meeting for retiring board members.

8. Adjourn

There being no further discussion, Chair Dyson adjourned the meeting at 7:38 pm.

Submitted by:
Holly Rosser, Board Secretary

Dated for Board Approval: April 10, 2025

OSBA Model Sample Policy

Code: JHFF/GBNAA

Adopted:

Suspected Sexual Conduct with Students and Reporting Requirements *

{Required policy. ORS 339.372 establishes the requirement for boards to adopt policy on suspected sexual conduct.}

Sexual conduct by district employees, contractors¹, agents², and volunteers³ is prohibited and will not be tolerated. All district employees, contractors, agents, ~~and~~ volunteers, **and students⁴** are subject to this policy. ~~Students are also subject to this policy if they are acting as an employee, contractor, agent or volunteer.~~

⁵“Sexual conduct,” means verbal or physical conduct or verbal, written or electronic communications by a school employee, a contractor, an agent or a volunteer that involve a student and that are sexual advances or requests for sexual favors directed toward the student, or of a sexual nature that are directed toward the student or that have the effect of unreasonably interfering with a student’s educational performance, or of creating an intimidating or hostile educational environment. “Sexual conduct” does not include touching or other physical contact that is necessitated by the nature of the school employee’s job duties or by the services required to be provided by the contractor, agent or volunteer, and for which there is no sexual intent; verbal, written or electronic communications that are provided as part of an education program that meets state educational standards or a policy approved by the Board; or conduct or communications described in the definition of sexual conduct herein if the school employee, contractor, agent or volunteer is also a student and the conduct or communications arise out of a consensual relationship between students, do not create an intimidating or hostile educational environment and are not prohibited by law, any policies of the district or any applicable employment agreements.

“Student” means any person who is in any grade from prekindergarten through grade 12 or 21 years of age or younger and receiving educational or related services from the district that is not a post-secondary institution of education, or who was previously known as a student by the person engaging in sexual conduct and who left school or graduated from high school within **90 days one calendar year** prior to the sexual conduct.

¹ “Contractor” means a person providing services to the district under a contract in a manner that requires the person to have direct, unsupervised contact with students.

² “Agent” means a person acting as an agent for the district in a manner that requires the person to have direct, unsupervised contact with students.

³ “Volunteer” means a person acting as a volunteer for the district in a manner that requires the person to have direct, unsupervised contact with students.

⁴ Student conduct may only be sexual conduct if the student is also an employee, contractor, agent, or volunteer.

⁵ This definition of “sexual conduct” affects all conduct that occurs before, on or after June 23, 2021, for purposes of reports that are made, investigations that are initiated, or a collective bargaining agreement, an employment contract, an agreement for resignation or termination, a severance agreement or any similar contract or agreement entered into, on or after June 23, 2021.

The district will post in each school building the names and contact information of the employees designated for the respective school buildings to receive reports of suspected sexual conduct and the procedures the designee will follow upon receipt of the report.

Any district employee [^{6}, contractor, agent or volunteer] who has reasonable cause to believe that a student has been subjected to sexual conduct by another district employee, contractor, agent or volunteer, or that another district employee, contractor, agent or volunteer has engaged in sexual conduct with a student shall immediately report such suspected sexual conduct to the ^{7}designated licensed administrator or the alternate designated licensed administrator, in the event the designated administrator is the suspected perpetrator, for their school building. If the conduct also constitutes child abuse, the employee must make mandatory reports in accordance with Board policy JHFE/GBNAB – Suspected Abuse of a Child Reporting Requirements.

If the superintendent is the alleged perpetrator the report shall be submitted to the [insert ^{8}designated licensed administrator position title] who shall report the suspected sexual conduct to the Board chair.

If an employee fails to report suspected sexual conduct or fails to maintain confidentiality of records, the employee will be disciplined up to and including dismissal.

When a designated licensed administrator receives a report of suspected sexual conduct by a district employee, contractor, agent or volunteer, the administrator will follow procedures established by the district and set forth in the district’s administrative regulation JHFF/GBNAA-AR - Suspected Sexual Conduct Report Procedures and Form. All such reports will be reported to the Oregon Department of Education (ODE) or Teacher Standards and Practices Commission (TSPC) in accordance with such administrative regulation. The agency receiving a report will complete an investigation regardless of any changes in the relationship or duties of the person who is the alleged perpetrator.

When there is reasonable cause to support the report, a district employee suspected of sexual conduct shall be placed on paid administrative leave pending an investigation and the district will take necessary actions to ensure the student’s safety.

When there is reasonable cause to support the report, a district contractor, agent or volunteer suspected of sexual conduct shall be removed from providing services to the district and the district will take necessary actions to ensure the student’s safety.

⁶ {The following language in brackets, i.e., [, contractor, agent or volunteer], is optional language for the district to consider including. If the language is kept, the district must make these groups aware of the policy and its administrative regulation and their responsibilities under both. This may also be included in contracts with agents and contractors and include reference to this policy.}

⁷ {ORS 339.372 requires the district have a policy that designates the licensed administrators and requires the district to post the names and contact information of the designees in the respective school building. A “licensed administrator” is a person employed as an administrator by the district and holds an administrative license issued by TSPC or may be a person employed by the district that does not hold an administrative license issued by TSPC if the district does not require the administrator to be licensed by TSPC.}

⁸ {A “licensed administrator” is a person employed as an administrator by the district and holds an administrative license issued by TSPC or may be a person employed by the district that does not hold an administrative license issued by TSPC if the district does not require the administrator to be licensed by TSPC.}

The district will notify, as allowed by state and federal law, the person who was subjected to the suspected sexual conduct about any actions taken by the district as a result of the report.

A district employee, contractor or agent will not assist another district employee, contractor or agent in obtaining a new job if the individual knows, or has reasonable cause to believe the district employee, contractor or agent engaged in sexual conduct. Nothing in this policy prevents the district from disclosing information required by law or providing the routine transmission of administrative and personnel files pursuant to law.

The initiation of a report in good faith about suspected sexual conduct may not adversely affect any terms or conditions of employment or the work environment of the person who initiated the report or who may have been subject to sexual conduct. If a student initiates a report of suspected sexual conduct by a district employee, contractor, agent or volunteer in good faith, the student will not be disciplined by the district or any district employee, contractor, agent or volunteer.

The district will provide to employees at the time of hire, or to a contractor, agent or volunteer at the time of beginning service for the district, the following:

1. A description of conduct that may constitute sexual conduct;
2. A description of the investigatory process and possible consequences if a report of suspected sexual conduct is substantiated; and
3. A description of the prohibitions imposed on district employees, contractors and agents when they attempt to obtain a new job, pursuant to ORS 339.378(2).

All district employees are subject to Board policy GCAB - Personal Electronic Devices and Social Media - Staff regarding appropriate electronic communications with students.

Any electronic communications with students by a contractor, agent or volunteer for the district will be appropriate and only when directed by district administration. When communicating with students electronically regarding school-related matters, contractors, agents or volunteers shall use district e-mail using mailing lists and/or other internet messaging approved by the district to a group of students rather than individual students or as directed by district administration. Texting or electronically communicating with a student through contact information gained as a contractor, agent or volunteer for the district is discouraged.

The superintendent shall develop administrative regulations to implement this policy and to comply with state law.

END OF POLICY

Legal Reference(s):

[ORS 332.107](#)

[ORS 339.370 - 339.400](#)

[ORS 419B.005 - 419B.045](#)

Every Student Succeeds Act, 20 U.S.C. § 7926 (2018).

~~House Bill 2136 (2021).~~

~~Senate Bill 51 (2021).~~

House Bill 4160 (2024).

R10/05/2112/24|LF

Suspected Sexual Conduct with Students and Reporting Requirements * –

Ashland School District

Code: EBC
Adopted:

Emergency Plan and First Aid**

{Highly recommended policy. This policy informs districts about requirement for an emergency procedures plan (OAR 581-022-2225), and other minimum standards for providing emergency care to students.}

The district will maintain a comprehensive safety program for all employees and students. This program will include a plan for responding to emergency situations. The superintendent will consult with community and county agencies while developing this plan. The district's emergency plan will meet any requirements of the State Board of Education.

Copies of the emergency plan will be available in every school office and other strategic locations throughout the district. Parents or guardians will be informed of the district's plan.

In each district facility, procedures for handling health emergencies will be established and made known to staff. Each district facility and district vehicle will be equipped with appropriate first-aid supplies and equipment. All employees are expected to know where first-aid supplies and equipment are kept in their work areas.

Each school in the district shall have, at a minimum, at least one staff member with a current first-aid/CPR/AED card for every 60 students enrolled and who are trained annually on the district and building emergency plans. Emergency planning will include the presence of at least one staff member with a current first-aid/CPR/AED card for every 60 students for school-sponsored activities where students are present.

The district shall provide instruction to staff and students in the emergency plan and safety program.

END OF POLICY

Legal Reference(s):

[ORS 30.800](#)
[ORS 192.660\(2\)\(k\)](#)
[ORS 332.107](#)
[ORS 433.260](#)
[ORS 433.441](#)

[OAR 437-002-0042](#)
[OAR 437-002-0120 - 0139](#)
[OAR 437-002-0161](#)
[OAR 437-002-0360](#)
[OAR 437-002-0377](#)
[OAR 581-022-2030\(3\)\(c\)](#)

[OAR 581-022-2220](#)
[OAR 581-022-2225](#)
[OAR 581-053-0003\(40\)](#)
[OAR 581-053-0220\(3\)\(e\)\(B\)\(iii\)](#)
[OAR 581-053-0320\(5\)\(b\)](#)
[OAR 581-053-0420\(2\)\(f\)\(B\)](#)

Every Student Succeeds Act, 20 U.S.C. § 7928 (2018).
Family Educational Rights and Privacy Act, 20 U.S.C. § 1232g (2018).

Ashland School District

Code: EBCA
Adopted:

Safety Threats**

{Required policy. Requirement for policy comes from ORS 339.324 which outlines actions of a school district when a safety threat action has occurred.}

“Safety threat action” means a ~~lockdown~~ **Hold, Secure, Lockdown, lookout, Shelter in place or Evacuation** that: (a) is initiated by a school in response to a safety threat; and (b) is not a planned drill.

When a school or the district initiates a safety threat action, the school or district shall issue an electronic communication as expediently as possible and not later than 24 hours after initiation of the safety threat action. The communication will be issued in culturally appropriate languages to effectively communicate with parents and guardians of students attending the school at which the safety threat action occurred.

The communication must include:

1. A general description of the issue that caused the safety threat action to be taken;
2. The duration of time the safety threat action was taken, from when the action was initiated until when it concluded;
3. Actions taken by the school or district to resolve the situation that caused the safety threat action and actions taken to protect student safety; and
4. An explanation of how the situation was resolved.

The communication shall be provided in a manner which communicates relevant facts and details as may be necessary or useful for parents and guardians to understand any potential threats to student safety, and to assist parents and guardians in helping students understand and mentally process the incident and any resulting trauma.

A communication will also be issued to employees of the school at which the safety threat action occurred, and must include the same information as above and any additional information as may be permitted by relevant confidentiality and privacy requirements.

The Board may use Oregon Revised Statute (ORS) 192.660(2)(k) to conduct an executive session to consider matters related to school safety or a plan that responds to safety threats made toward a school in the district.

END OF POLICY

Legal Reference(s):

[ORS 192.660\(2\)\(k\)](#)

[ORS 332.107](#)

[ORS 339.324](#)

Ashland School District

Adopted: 6/07/04

Readopted: 5/08/17

Orig. Code(s): EBCB

Review: 2/27/25

Emergency Procedure Drills and Instruction

{Highly recommended policy. This policy includes information about required instruction and drills on emergency procedures. See ORS 336.071}

Each administrator will conduct emergency procedure drills in accordance with the provisions of Oregon Revised Statutes (ORS) and the applicable Oregon Fire Code.

All schools are required to instruct and drill students on district emergency procedures so ~~that students~~ they can respond to an emergency without confusion and panic. The emergency procedures shall include drills and instruction on fires, earthquakes, ~~which shall include tsunami procedures in a tsunami hazard zone~~ and safety threats. Instruction on ~~fires, earthquakes, and safety threats, and drills for students~~ emergency procedures shall be conducted for at least 30 minutes each school month.

The first emergency evacuation drill shall be conducted within 10 days of the beginning of classes.

Fire Emergencies

~~The district will conduct monthly fire drills. At least one fire drill will be held within the first 10 days of the school year.~~ Drills and instruction on fire emergencies shall include routes and methods of exiting the school building.

Earthquake Emergencies

At least two drills on earthquakes shall be conducted each year.

Drills and instruction for earthquake emergencies shall include the earthquake emergency response procedure of “drop, cover and hold on” during the earthquake. When based on the evaluation of specific engineering and structural issues related to a building, the district may include additional response procedures for earthquake emergencies.

Safety Threats

At least two drills on safety threats shall be conducted each year.

Drills and instruction on safety threats shall include procedures related to Hold, Secure, Lockdown, ~~lookout~~, Shelter in place, and Evacuation and other appropriate actions to take when there is a threat to safety, and will include explanation of the district’s communication strategy following a safety threat action (See Board policy EBCA-Safety Threats).

~~The Board may use ORS 192.660(2)(k) to conduct an executive session to consider matters related to school safety or a plan that responds to safety threats made toward a school in the district.~~

[The district may provide additional instruction relating to other disasters such as flooding, drought, excessive snowfall, or wildfires.]

Local units of government and state agencies associated with emergency procedures training and planning shall review the emergency procedures and assist the district with the instruction and the conducting of drills for students in these emergency procedures.

END OF POLICY

Emergency Drills and Instruction - EBCB 1-
2

Legal Reference(s):

[ORS 192.660\(2\)\(k\)](#)

[ORS 336.071](#)

[ORS 476.030\(1\)](#)

[OAR 581-022](#)-1420

OREGON STATE FIRE MARSHAL, OREGON FIRE CODE (2014).

Cross Reference(s):

GBE - Staff Health and Safety *

Emergency Drills and Instruction - EBCB 2-2

Ashland School District 5

Code: **EBC/EBCA**

Adopted: 10/14/08

Readopted: 5/08/17

Orig. Code(s): EBC/EBCA

Emergency Procedures and Disaster Plans

The superintendent will develop and maintain plans specifying procedures to be used in such emergencies as disorderly conduct, unlawful assembly, disturbances at school activities, natural disasters, fire, illness or injury of a student or staff member, and use of force on school property. The superintendent will consult with community and county agencies while developing those plans.

The district's Emergency Procedure Plans will meet or exceed the minimum standards of the State Board of Education.

Copies of the Emergency Procedure Plans will be available in every school office and other strategic locations throughout the district. Parents will be informed of the district's plans for the care of students during an emergency situation. The Board may use Oregon Revised Statute (ORS) 192.660(2)(k) to conduct an executive session to consider matters related to school safety or a plan that responds to safety threats made toward a school in the district.

In case of long term disruption to district operations, the district emergency plan shall at a minimum include the following:

1. Who is in charge of the district plan;
2. What steps the district will take to stop the spread of disease;
3. How sick students will be identified;
4. Transportation plan for sick students;
5. Disease containment measures for the district;
6. Communication plan for staff, students, parents;
7. Continuing education plan for students;
8. Procedures for dealing with student privacy rights;
9. Employee leave procedures during a pandemic flu or other catastrophe;
10. Employee pay and benefit plan and procedures;
11. Facility utilization by other agencies procedures;

12. Business operations plan for offsite operation or alternative measures.

END OF POLICY

Legal Reference(s):

[ORS 192.660\(2\)\(k\)](#)

[ORS 332.107](#)

[ORS 433.260](#)

[ORS 433.441](#)

[OAR 437-002-0161](#)

[OAR 581-022-0705](#)

[OAR 581-022-1210\(3\)\(c\)](#)

[OAR 581-022-1420](#)

Cross Reference(s):

EEAC - School Bus Safety Program

GBE - Staff Health and Safety

JHCC - Communicable Diseases

Ashland School District 5

Code: **JGE**
Adopted: 12/08/03
Readopted: 6/12/17
Orig. Code(s): JGE

Expulsion**

Notes:

This policy has been modified since the board's last review to include:

- ✓ Designation of Hearings officer
- ✓ Clarification on steps a family would take to initiate an appeal and the process of the board to conduct a review/appeal (page 2).

Ashland School District 5

Code: **JGE**
Adopted: 12/08/03
Readopted: 6/12/17
Orig. Code(s): JGE

Expulsion**

A principal, after reviewing available information, may recommend to the superintendent that a student be expelled. Expulsion of a student will not extend beyond one calendar year.

A student may **only** be expelled for any of the following circumstances:

1. When a student's conduct poses a threat to the health or safety of students or employees;
2. When other strategies to change the student's **behavior-conduct** have been ineffective, except that expulsion may not be used to address truancy; or
3. When required by law.

The use of expulsion for discipline of a student in fifth grade or lower is limited to:

1. Nonaccidental conduct causing serious physical harm to a student or employee;
2. When a school administrator determines, based on the administrator's observations or upon a report from an employee, the student's conduct poses a **direct** threat to the health or safety of students or employees; or
3. When the expulsion is required by law.

The age of the student and the past pattern of behavior will be considered prior to imposing the expulsion.

No student may be expelled without a hearing unless the student's parents, or the student if 18 years of age, waive the right to a hearing, either in writing or by failure to appear at a scheduled hearing. ~~By waiving the right to a hearing, the student and parent agree to abide by the lawful findings of a hearings officer.~~

~~The Board delegates the authority to decide on an expulsion to the superintendent. {¹} The superintendent may designate another person to handle the potential expulsion, and the superintendent, a designee or another individual may act as the hearings officer. The district may contract with an individual who is not employed by the district to serve as the hearings officer. The hearings officer will not be associated with the initial actions of the building administrators. The hearings officer will conduct the hearing and make a final decision regarding the expulsion. A decision of the hearings officer may be appealed by the parent or the student if age 18 or over to the Board for review.~~

¹ The Board can retain authority for all expulsions. If the Board chooses not to delegate this authority, any recommendations for expulsion from administration would come to the Board for resolution. The Board would have to meet and determine next steps for all expulsions.

Expulsion** - JGE
1-4

If the decision of the hearings officer is appealed to the Board for review, the findings as to the facts and the hearings officer's decision will be submitted to the Board, and will be available in identical form to the Board, the student and the student's parents at the same time. At a future meeting, the Board will review the hearings officer's decision and will affirm, modify or reverse the decision.

An appeal may be requested within five (5) days of receipt of the hearings officer's decision by contacting the Board Secretary at the District Office. The Board Secretary would then place the appeal on an upcoming agenda for review. The Hearings Officer and Parent/Student will receive the same information that the Board receives which will include all of the materials presented during the hearing, the hearing officer's findings, and final decision. The Board, at its discretion, may call the Hearings Officer or others into Executive session for additional information. The review will be conducted in executive session and the decision of the board will be final. The Board will direct district staff to inform the family in writing within five (5) days of the board's decision.

Commented [JH1]: Appeal Process

When a recommendation for expulsion is made and an expulsion hearing is not waived, the following procedure is required:

1. Notice will be given to the student and the parent by personal service² or by certified mail³ at least five days prior to the scheduled hearing. Notice shall include:
 - a. The specific charge or charges and the specific facts that support the charge or charges;
 - b. The conduct constituting the alleged violation, including the nature of the evidence of the violation and reason for expulsion;
 - c. A recommendation for expulsion statement of intent to consider the charges as reason for expulsion;
 - d. The student's right to a hearing;
 - e. When and where the hearing will take place; and
 - f. The student may be represented by counsel or other persons right to representation;
2. The Board may expel, or may delegate the authority to decide on an expulsion to the superintendent or superintendent's designee, who may also act as the hearings officer. The district may contract with an individual who is not employed by the district to serve as the hearings officer. The hearings officer designated by the Board will conduct the hearing and will not be associated with the initial actions of the building administrators;
3. Expulsion hearings will be conducted in private and will not be open to the general public unless the student or the student's parents request an open session;
4. If In case either the parent or the student has difficulty understanding does not understand the English language or has other serious communication disabilities, the district will provide a translator an interpreter during the hearing. All communications will be in a manner that is understandable to the parents and students;

²The person serving the notice shall file a return of service. (OAR 581-021-0070)

³When "certified mail is given to a parent of a suspended student, the notice shall be placed in the mail at least five days before the date of the hearing." (OAR 581-021-0070)

Expulsion** - JGE
2-4

- 5.3. The student shall be permitted to have a representation present at the hearing to advise and to present arguments. The representation may be an attorney, ~~and/or parent or other person~~. The district's attorney may be present;
- 6.4. The student shall be afforded the right to present ~~his/her~~ **their** version ~~as to of~~ the events underlying the expulsion recommendation and to introduce evidence by testimony, writings or other exhibits;
- 7.5. The student shall be permitted to be present and to hear the evidence presented by the district;
- 8.6. The hearings officer or the student may record the hearing;
- 9.7. Strict rules of evidence shall not apply to the proceedings; ~~h~~However, this shall not limit the hearings officer's control of the hearing;
10. ~~If the Board is conducting the expulsion hearing, the Board may designate the Board chair or a third party as the hearings officer. The hearings officer will determine the facts of each case on the evidence presented at the hearing. Evidence may include the relevant past history and student education records. The hearings officer will provide to the Board, findings as to the facts, the recommended decision and whether or not the student has committed the alleged conduct. This will include the hearings officer's recommended decision on disciplinary action, if any, including the duration of any expulsion. This material will be available in identical form to the Board, the student, if age 18 or over, and the student's parents at the same time. Following the review by the Board of the hearings officer's recommendation, the Board will make the final decision regarding the expulsion;~~
11. ~~If the Board has delegated authority to the superintendent or designee to act as the hearings officer, the superintendent may designate him or herself themselves, or a third party, as the hearings officer. The hearings officer's decision is final. However, a decision of the hearings officer may be appealed by the parent or the student if age 18 or over to the Board for review. If the decision of the hearings officer is appealed to the Board for review, the findings as to the facts and the hearings officer's decision will be submitted to the Board, and will be available in identical form to the Board, the student and the students' parents at the same time. At its next regular or special meeting, the Board will review the hearings officer's decision and will affirm, modify or reverse the decision;~~
- 12.8. A ~~Board-conducted hearing or a~~ Board review of the hearings officer's decision through appeal will be conducted in executive session unless the student or the student's parent requests a public hearing. If an executive session is held by the Board or a private hearing is held by the hearings officer, the following will not be made public:
- The name of the student;
 - The issues involved, including a student's confidential ~~medical~~ **records** ~~and that student's educational program;~~
 - The discussion;
 - The vote of Board members, which may be taken in executive session when considering an expulsion.

Prior to expulsion, ~~the district must propose alternative programs of instruction or instruction combined with counseling to a student subject to expulsion for reasons other than a weapons policy violation. The~~

Expulsion** - JGE
3-4

district must notify the student and parents of alternative programs of instruction or instruction combined with counseling and document this notification~~document to the parent of the student that proposals of alternative education programs have been made.~~

END OF POLICY

Legal Reference(s):

[ORS 192.660](#)

[ORS 332.061](#)

[ORS 336.615](#) to -336.665

[ORS 339.115](#)

[ORS 339.240](#)

[ORS 339.250](#)

[OAR 581-021](#)-0050 to -0075

Cross Reference(s):

JG - Student Discipline

Expulsion** - JGE
4-4

OSBA Model Sample Policy

Code: DJC
Adopted:

Bidding Requirements

{Highly recommended policy. The Board serves as the Local Contract Review Board (LCRB) and has the ability to adopt its own procurement rules. Many districts choose to use the *Oregon Attorney General's Model Public Contracting Rules* in OAR Chapter 137, Divisions 045 - 049. If the LCRB does not adopt rules, the Attorney General's Model Public Contracting Rules apply. This policy is based on those rules. The LCRB may also include as part of its rules portions of the Oregon Department of Administrative Services administrative rules in OAR Chapter 125, Divisions 269 - 249. If the LCRB adopts its own rules, delete portions of this policy that are inconsistent with those rules.}

The Board is the Local Contract Review Board (LCRB) for the district. [The LCRB has not adopted its own rules of procurement. Consequently, the *Oregon Attorney General's Model Public Contracting Rules*¹ shall apply to the district.²

Additionally, the district may include as part of its procedures portions of the Oregon Department of Administrative Services administrative rules governing Public Contract Exemptions, OAR Chapter 125, Divisions 246 - 249.

The LCRB may make the written findings required by law for exemptions from competitive bidding. Such findings shall be maintained by the district and made available on request.

The district may not artificially divide or fragment a procurement to reduce the procurement requirements.

The superintendent may develop administrative regulations or procedures to assist with the implementation of this policy and applicable procurement rules.

Goods and Services

The district will purchase goods and services through the following procedures, unless an exception applies:

1. Small Procurement. For purchases of goods and services with a contract price not exceeding \$25,000, the district can use any manner deemed practical or convenient, including direct selection or award. Amendments to a contract awarded through small procurement must be in accordance with OAR 137-047-0800.
2. Intermediate Procurement. For purchases of goods and services with a contract price exceeding \$25,000, but not exceeding \$250,000, the district shall seek at least three informally solicited competitive price quotes or competitive proposals from prospective contractors. The district will keep record of the request and quotes. If three quotes are not reasonably available, fewer will suffice, but the district will make a written record of the effort made. The district may negotiate with a

¹ Oregon Administrative Rules (OAR) 137-045 - 049

² See ORS 279A.065(5). {The LCRB can formally adopt the AG rules. If the LCRB formally adopts the rules, the district is required to review the AG rules each time there is a modification.}

prospective contractor to clarify the quote or offer, or to effect modifications. Amendments to a contract awarded through intermediate procurement must be in accordance with OAR 137-047-0800.

3. Regular Procurement. For purchases exceeding \$250,000, the district will use competitive sealed bids (OAR 137-047-0255) or competitive sealed proposals (OAR 137-047-0260). Amendments to contracts awarded through regular procurement must be in accordance with OAR 137-047-0800.
4. Emergency Procurements. In situations of emergency³, the LCRB or designee may authorize an emergency procurement. In an emergency procurement, the district is not required to follow general procurement requirements. The district must ensure competition for the contract that is reasonable and appropriate under the circumstances. The district must document the nature of the emergency and the method used for the selection of the contractor.
5. Sole-source Procurements. If the LCRB or designee determines that the goods or services are available from only one source, the district may award a contract without competition. To the extent reasonably practicable, the district shall negotiate with the sole source to obtain contract terms that are advantageous to the district. The determination of sole source must be based on written findings and may include:
 - a. That the efficient utilization of existing goods requires acquiring compatible goods or services;
 - b. That the goods or services required to exchange software or data with other public or private agencies are available from only one source;
 - c. That the goods or services are for use in a pilot or experimental project; or
 - d. Other findings that support the conclusion that the goods or services are available from only one source.⁴
6. Special Procurements. “Special procurement” means a contract or class of contracts that use a contracting procedure other than competitive sealed proposals, competitive sealed bidding, small procurement or intermediate procurement. Special procurements require LCRB approval and will be conducted in accordance with ORS 279B.085, OAR 137-047-0285[, and] this policy [and administrative regulation DJC-AR - Exemptions from Competitive Bidding and Special Procurement].^{5}
7. Personal Services Contracts. “Personal services contract,” as used in this policy, means a contract whose primary purpose is to acquire specialized skills, knowledge and resources in the application of technical or scientific expertise, or the exercise of professional, artistic or management discretion or judgment.⁶ Unless otherwise designated by the LCRB, personal services contracts will be procured

³ “Emergency” means circumstances that:

1. Could not have been foreseen;
2. Create a substantial risk of loss, damage or interruption of services or a substantial threat to property, public health, welfare or safety; and
3. Require prompt execution of a contract to remedy the condition.

⁴ If the contract does not exceed \$250,000, using intermediate procurement is likely less burdensome than sole source.

⁵ {If the LCRB has designated contracts or classes of contracts as special procurements, include this information along with reference to the LCRB action.}

⁶ This includes, but is not limited to, contracts for the services of an accountant, physician or dentist, educator, consultant (including a provider under an Architectural and Engineering Service Contract), broadcaster, or artist (including a photographer, filmmaker, painter, weaver or sculptor (OAR 137-045-0010(19)). Also includes architectural, engineering, photogrammatic

in accordance with applicable procurement laws. The LCRB may designate certain service contracts or classes of service contracts as personal services contracts and exempt them from competitive bidding.^{7} All personal services contracts shall be based on demonstrated qualifications and competence to perform the required services, encourage competition, discourage favoritism and obtain services at a fair and reasonable price. Personal service contractors may be required to qualify as independent contractors in accordance with applicable laws.⁸

Procurements for services estimated to be in excess of \$250,000 shall go through the cost analysis and feasibility process in accordance with ORS 279B.030.

Public Improvements

“Public improvement” means a project for construction, reconstruction or major renovation on real property by or for the district.⁹ The district will contract for public improvements using the following procedures, unless an exception applies.

1. Public improvements contracts with a value of less than \$25,000 are exempt from competitive bidding.
2. Intermediate Procurements. For public improvement contracts not exceeding \$100,000, the district may utilize three quotes¹⁰:
 - a. The request for the quotes shall be in writing (unless not reasonably practicable)¹¹;
 - b. The request for quotes shall include the selection criteria and if the criteria are not of equal value, their relative value or ranking.

The district shall award the contract to the prospective contractor whose quote will best serve the interest of the district, based on the selection criteria. If the award is not made to the offeror and quote with the lowest price, the district will make a written record of the basis for the award. Amendments to a contract awarded via intermediate procurement may be increased in accordance with OAR 137-049-0160(6)-(7).

3. Regular Procurements. For purchases exceeding \$100,000, the district will use invitation to bid or request for proposals except as otherwise allowed by law. See OAR 137-049-0130 and OAR 137-

mapping, transportation planning or land surveying services procured under ORS 279C.105 (ORS 279C.100) and related services procured under ORS 279C.120 (ORS 279C.100(5)).

⁷ {If the LCRB has designated contracts or classes of contracts as personal services contracts, include this information along with reference to the LCRB action.}

⁸ See ORS 670.600 and OAR 459-005-0020.

⁹ Public improvement does not include:

1. Projects for which no funds of the district are directly or indirectly used, except for participation that is incidental or related primarily to project design or inspection; or
2. Emergency work, minor alternation, ordinary repair or maintenance necessary to preserve a public improvement.

¹⁰ If three quotes are not reasonably available, the district shall make a written record of the effort made to obtain these quotes.

¹¹ For Public Works Contracts, oral quotations may only be utilized in the event that written copies of prevailing wage rates are not required by the Bureau of Labor and Industries.

049-0640. Amendments to contracts awarded through regular procurement must be in accordance with OAR 137-049-0910.

4. Emergency Procurements. Emergency contracts for construction services are not considered public improvement contracts and will be procured in accordance with OAR 137-049-0140 and OAR 137-049-0150.
5. Community Benefit Contracts. “Community benefit contract” means a public improvement contract that includes, but is not limited to, terms and conditions that require the contractor to:
 - a. Qualify as a training agent, as defined in ORS 660.010, or provide apprenticeship training that meets applicable federal and state standards for apprenticeship training;
 - b. Employ apprentices to perform a specified percentage of work hours that workers in apprentice able occupations perform on the community benefit project;
 - c. Provide employer -paid family health insurance; and
 - d. Meet any other requirements that the LCRB sets forth.

Community benefits contracts may be procured in accordance with ORS 279C.308.

6. Construction Manager/General Contractor (CM/GC) Procurement. The district shall procure CM/GC services in accordance with model rules the Attorney General adopts under Oregon Revised Statute (ORS) 279A.065(3) and OAR 137-049-0690, which requires “the assistance of legal counsel with substantial experience and necessary expertise in using the CM/GC Method, as well as knowledgeable staff, consultants or both staff and consultants who have demonstrated capability of managing the CM/GC process in the necessary disciplines of engineering, construction scheduling and cost control, accounting, legal, Public Contracting and project management.”

END OF POLICY

Legal Reference(s):

[ORS Chapter 279](#)
[ORS Chapter 279A](#)
[ORS Chapter 279B](#)
[ORS Chapter 279C](#)

[ORS 670.600](#)
[OAR Chapter 125](#), Divisions 246 -
249

[OAR Chapter 137](#), Divisions 045 -
049
[OAR 459-005-0020](#)

[OREGON PROCUREMENT MANUAL](#), Oregon Department of Administrative Services.

OSBA Model Sample Administrative Regulation

Code: DJC-AR

Revised/Reviewed:

Exemptions from Competitive Bidding and Special Procurements

{This optional administrative regulation is intended to provide guidance for the district in preparing a request for special procurement to the Local Contract Review Board (LCRB). This administrative regulation is not intended as procurement rules in place of the *Attorney General's Model Public Contracting Rules* or rules adopted by the LCRB.}

All public contracts shall be based upon competitive bids or proposals, except the following:

1. Contracts below threshold levels in accordance with ORS 279B.065 (small procurements for goods and services), 279B.070 (intermediate procurements for goods and services) and 279C.412 (intermediate procurements for public improvements);
2. Special procurements for goods and services in accordance with ORS 279B.085 and OAR 137-047-0285;¹
3. Contracts which have been exempted under ORS 279A.025 and 279C.335; and
4. Any other contract exempted by law.

SPECIAL PROCUREMENTS FOR GOODS AND SERVICES

To proceed with a special procurement, the district shall submit a written request to the Board, acting as the Local Contract Review Board (LCRB). This request shall describe the contracting procedure, the goods and services or class of goods and services that are the subject of the special procurement, and circumstances that justify the use of a special procurement.

The special procurement must be unlikely to encourage favoritism in the awarding of a public contract or to substantially diminish competition for public contracts; and (A) must be reasonably expected to result in substantial cost savings to the district or to the public; or (B) must substantially promote the public interest in a matter that could not practicably be realized by complying with requirements that are applicable under ORS 279B.055, 279B.060, 279B.065, 279B.070 or any related rules.

After LCRB approval, the district may proceed with a special procurement. Public notice of the approval of a special procurement must be given in the same manner as provided in ORS 279B.055(4). If the district intends to award a contract through special procurements that calls for competition among prospective contractors, the district shall award the contract to the contractor it determines to be most advantageous to the district.

When the LCRB approves a class special procurement the district may award contracts to acquire goods and services within the class of goods and services in accordance with the terms of the approval without making a subsequent request for a special procurement.

¹ Procurement law for goods and services uses the term “special procurement.” Procurement law for public improvement contracts does not use the term “special procurement,” but a comparable exemption is allowed under ORS 279C.335.

The following are additional considerations and requirements for specific types of special procurements. The request submitted to the LCRB should address these provisions and satisfy any requirements.

Brand Names or Equal²

1. “Brand name or equal specification” means a specification that uses one or more manufacturers’ names, makes, catalog numbers or similar identifying characteristics needed to meet the district’s requirements and that authorizes bidders or proposers to offer goods or services that are equivalent or superior to those named or described in the specification.
2. “Brand name specification” means a specification limited to one or more products, brand names, makes, manufacturer’s names, catalog numbers or similar identifying characteristics.”
3. “Specification” means any description of the physical or functional characteristics of, or of the nature of, goods or services to be procured by a contracting agency.³

A brand name or equal specification may be used when the use of a brand name or equal specification is advantageous to the district because the brand name describes the standard of quality, performance, functionality and other characteristics of the product needed by the district. The district is entitled to determine what constitutes a product that is equal or superior to the product specified, and any such determination is final. Nothing in the law or this administrative regulation may be construed as prohibiting the district from specifying one or more comparable products as examples of the quality, performance, functionality or other characteristics of the product needed by the contracting agency.

A brand name specification may be prepared and used only if the district determines for a solicitation or class of solicitations that only the identified brand name specification will meet the needs of the district based on one or more of the following written determinations:

1. That use of the brand name specification is unlikely to encourage favoritism in the awarding of public contracts or substantially diminish competition for public contracts;
2. That use of a brand name specification would result in substantial cost savings to the contracting agency;
3. That there is only one manufacturer or seller of the product of the quality, performance or functionality required; or
4. That efficient utilization of existing goods requires the acquisition of compatible goods or services.

Advertising Contracts, Purchase of⁴

The district traditionally purchases advertising in newspapers, however, the district may also purchase advertising in other media, such as radio, television or the internet. Advertising contracts may be procured without competitive procurement based on findings of:

² For additional guidance, see OAR 125-247-0691.

³ Specification may include a description of any requirement for inspecting, testing or preparing goods or services for delivery.

⁴ See OAR 125-247-0288(5) for additional guidance.

1. Advertisements are placed in a particular source because of the specific audience that source serves;
2. Competition to furnish advertising space in daily newspapers of general, trade or business circulation in the vicinity of the district is limited;
3. Cost savings are difficult to quantify where the sources are unique and not interchangeable;
4. Advertisements may be placed to satisfy legal notice or Board policy requirements;
5. Other published advertisements or notices, such as routine public notices, personnel recruitment information, etc., are placed in one or more of the publications of general circulation in the local area and other publications, as appropriate;
6. The communities served by the district rely upon its use of the local daily newspaper as a central source of news and information regarding district activities; or
7. It is unknown whether contracts for advertisements placed with radio, television, the internet or other media are going to result in cost savings if not placed for competitive bid or request for proposal (RFP). If possible, savings could be obtained through competitive means, the district would attempt to obtain competitive quotes or bids, as appropriate.

Advertising Contracts, Sale of

The district may sell advertising for district publications and activities, regardless of a dollar amount, without competitive bidding, including school newspapers, yearbooks, athletic programs, drama or music programs and the like.

Sales of advertising for student activities are generally other fund revenues, where student groups solicit advertisements from local businesses to help with the cost of the activity itself. A common example is the sale of advertising in school newspapers and yearbooks. The district itself would not achieve any increased revenue to the General Fund by seeking competitive bids or proposals for such advertising. This holds true for other student activities, such as athletics, drama or music events and the like.

Equipment Repair and Overhaul⁵

The district may enter into a public contract for equipment repair or overhaul without competitive bidding when competitive procurement is not practical. This may include when service or parts required are unknown and the cost cannot be determined without extensive preliminary dismantling or testing, or service or parts required are for sophisticated equipment for which specially trained personnel are required and such personnel are available from only one source. The district will use a competitive procedure to the extent practicable.

If the repair or overhaul qualifies as an emergency, the district may use emergency procurement procedures.

Copyrighted Materials

⁵ For additional guidance, see OAR 127-247-0288(6).

Contracts for the procurement or distribution of textbooks are exempt from public procurement requirements. Purchase of copyrighted materials available from only one source may be procured through the sole source procedures. Requests for special procurement approval for the purchase of other copyrighted materials may be submitted to the LCRB with supporting information.

Used Personal Property or Equipment, Purchase⁶

The district may purchase used property or equipment without obtaining competitive bids or quotes, if at the time of purchase, the LCRB has determined that the purchase will result in substantial cost savings to the district or promote the public interest and will unlikely diminish competition or encourage favoritism. “Used personal property or equipment” is property or equipment which has been placed in its intended use by a previous owner or user for a period of time recognized in the relevant trade or industry as qualifying the personal property or equipment as “used,” at the time of district purchase.

Information Technology and Telecommunication Contracts⁷

The district may enter into a contract to acquire information technology hardware and software and services (including telecommunications) without competitive bidding if, the LCRB has determined that the purchase will result in substantial cost savings to the district or promote the public interest and will unlikely diminish competition or encourage favoritism.

Renegotiation of Existing Contracts with Incumbent Contractors

The district may amend or renegotiate contracts with existing vendors, service providers or other parties in accordance with OAR 137-047-0800.

EXEMPTIONS FOR PUBLIC IMPROVEMENT CONTRACTS

Oregon law⁸ allows for exceptions to competitive bidding for public improvement contracts or classes of contracts when the LCRB approves findings that:

1. The exemption is unlikely to encourage favoritism in awarding public improvement contracts or substantially diminish competition for public improvement contracts; and
2. Awarding a public improvement contract under the exemption will likely result in substantial cost savings and other substantial benefits to the district.

In approving a finding, the LCRB shall consider the type, cost and amount of the contract and, to the extent applicable to the particular public improvement contract or class of public improvement contracts, the following:

⁶ For additional guidance, see OAR 125-247-0288(10). When contracting with another governmental entity, a district has a statutory exception under ORS 279A.025. The district may purchase state/federal surplus property through the Department of Administrative Services, State Services Division for Surplus Property. For more information on this program, contact DAS at 503-378-4714.

⁷ For additional guidance, see OAR 127-247-0185.

⁸ See ORS 279C.335.

1. How many persons are available to bid;
2. The construction budget and the projected operating costs for the completed public improvement;
3. Public benefits that may result from granting the exemption;
4. Whether value engineering techniques may decrease the cost of the public improvement;
5. The cost and availability of specialized expertise that is necessary for the public improvement;
6. Any likely increases in public safety;
7. Whether granting the exemption may reduce risks to the contracting agency, the state agency or the public that are related to the public improvement;
8. Whether granting the exemption will affect the sources of funding for the public improvement;
9. Whether granting the exemption will better enable the contracting agency to control the impact that market conditions may have on the cost of and time necessary to complete the public improvement;
10. Whether granting the exemption will better enable the contracting agency to address the size and technical complexity of the public improvement;
11. Whether the public improvement involves new construction or renovates or remodels an existing structure;
12. Whether the public improvement will be occupied or unoccupied during construction;
13. Whether the public improvement will require a single phase of construction work or multiple phases of construction work to address specific project conditions; and
14. Whether the contracting agency or state agency has, or has retained under contract, and will use contracting agency or state agency personnel, consultants and legal counsel that have necessary expertise and substantial experience in alternative contracting methods to assist in developing the alternative contracting method that the contracting agency or state agency will use to award the public improvement contract and to help negotiate, administer and enforce the terms of the public improvement contract.

In granting this exemption, the LCRB shall:

1. If appropriate, direct the use of alternative contracting methods that take account of market realities and modern practices and are consistent with the public policy of encouraging competition;
2. Require and approve or disapprove written findings by the district that support awarding a particular public improvement contract or a class of public improvement contracts, without the competitive bidding requirements. The findings must show that the exemption complies with the requirements outlined in this administrative regulation; and
3. If the procurement involves construction manager/general contractor services, require the district conduct the procurement in accordance with OAR 137-049-0690.

Notification of a proposed exemption under this section must be published in at least one trade newspaper of general statewide circulation a minimum of 14 days before the date on which the LCRB intends to take action to approve or disapprove the exemption. The notice must state that in response to a written request, the district will hold a public hearing for the purpose of taking comments on the draft findings for an exemption from the competitive bidding requirement.⁹ If a hearing is held, the district shall offer an opportunity for any interested party to appear and comments. If the district must act promptly because of circumstances beyond the district's control that do not constitute an emergency, notification of the proposed exemption may be published simultaneously with the district's solicitation of contractors, as long as responses to the solicitation are due at least five days after the agency intends to take action to approve or disapprove the proposed exemption.

⁹ The district may hold a hearing even if there is no written request.

Ashland School District 5

Code: DJC
Adopted: 12/11/06
Revised/Readopted: 5/08/17; 12/14/23
Orig. Code: DJC

Bidding Requirements

The Board is the Local Contract Review Board (LCRB) for the district. All public contracts shall be invited in accordance with applicable competitive procurement provisions of Oregon Revised Statutes (ORS) and adopted public contracting rules.

The Board, acting as its own LCRB, adopts¹ the *Oregon Attorney General's Model Public Contract Rules*, Oregon Administrative Rule (OAR) Chapter 137, Divisions 046 through 049 in effect at the time this policy is adopted.

The district shall procure the construction manager/general contractor services in accordance with model rules the Attorney General adopts under Oregon Revised Statute (ORS) 279A.065(3).

Additionally, the Board may include as part of its rules portions of the Oregon Department of Administrative Services rules governing Public Contract Exemptions, OAR Chapter 125, Divisions 246-249 in effect at the time this policy is adopted.

The Board may make the written findings required by law for exemptions from competitive bidding. Such findings shall be maintained by the district and made available on request.

The district shall review its rules each time the Attorney General adopts a modification of the model rules, as required by ORS 279A.065(6)(b) to determine whether any modifications need to be made to district rules to ensure compliance with statutory changes. Modifications will be made only following review by the district's legal counsel. New rules, as necessary, shall be adopted by the Board. In the event it is unnecessary to adopt new rules, Board minutes will reflect that the review process was completed as required.

The Board, acting as the LCRB, may enact a resolution that authorizes the district to designate a public improvement as a community benefit contract per the requirements included in ORS 279C.300 to 279C.470.

Procurements for services estimated to be in excess of \$250,000 shall go through the cost analysis and feasibility process described in ORS 279B.

END OF POLICY

¹Public Contracts shall be governed by ORS Chapter 279, 279A, 279B and 279C. Additionally, the Board may, as provided by ORS 279A.065, adopt the Oregon Attorney General's Model Public Contract Rules, OAR Chapter 137 governing purchasing/bid procedures. The Board may also adopt the Oregon Department of Administrative Services rules governing Public Contract Exemptions, OAR Chapter 125. The Board may adopt portions of those rules or adopt its own rules. A Board that has not established its own rules of procedure for public contracts is subject to the model rules (OAR Chapter 137) adopted by the Attorney General.

Legal Reference(s):

ORS Chapters [279](#), [279A](#), [279B](#) and [OAR Chapter 125](#), Divisions 246-249
[279C](#)

OR. DEP'T OF JUSTICE, OR. ATT'Y GENERAL'S PUBLIC CONTRACTS MANUAL.

Cross Reference(s):

DJ - District Purchasing
DJCA - Personal Services Contracts
DJG - Vendor Relations
EH - Electronic Data Management

DELETE

Ashland School District 5

Code: **DJCA**
Adopted: 12/11/06
Readopted: 5/08/17
Orig. Code(s): DJCA

Personal Services Contracts

The district may enter into personal services contracts with qualified professionals as provided by Oregon Revised Statute (ORS) 279A.055. "Personal services contracts," as used in this policy, shall be defined to include those services that require specialized technical, creative, professional or communication skills or talents, unique and specialized knowledge, or the exercise of discretionary judgment, and for which the quality of the service depends on attributes that are unique to the service provider. Such services shall include, but are not limited to: architects; engineers, surveyors; attorneys; accountants; auditors; computer programmers; artists; designers; performers; and consultants. The superintendent or designee shall have the authority to determine whether a particular service is a "personal service" under this definition. The district may enter into a personal services contract with a current district employee only when the individual meets independent contractor status in accordance with state, Public Employees Retirement System (PERS) and Internal Revenue Service (IRS) requirements.

Selection of a personal services contractor will be based primarily on qualifications and performance history, expertise, knowledge and creativity and the ability to exercise sound professional judgment.

All personal services contracts shall be based on demonstrated qualifications and competence to perform the required services, encourage competition, discourage favoritism and obtain services at a fair and reasonable price.

Contracts for personal services in excess of \$75,000 shall require prior Board approval.

The superintendent will develop administrative regulations as necessary to implement this policy.

END OF POLICY

Legal Reference(s):

[ORS Chapters 279](#)
[ORS Chapters 279A, 279B and 279C](#)

[ORS 332.107](#)
[ORS 670.600](#)

[OAR 459-010-0030](#)

INTERNAL REVENUE SERVICE, PUBLICATION 1779; INDEPENDENT CONTRACTOR OR EMPLOYEE (Rev. 3-2012).

Cross Reference(s):

DJC - Bidding Requirements

Ashland School District 5

Code: JHCD/JHCDA
Adopted: 11/10/03
Revised/Readopted: 3/14/16; 6/12/17; 4/25/22
Orig. Code: JHCD

Medications**

The district recognizes that administering a medication to a student and/or permitting a student to administer a medication to them self, may be necessary when the failure to take such medication during school hours would prevent the student from attending school, and recognizes a need to ensure the health and well-being of a student who requires regular doses or injections of a medication as a result of experiencing a life-threatening allergic reaction or adrenal crisis¹, or a need to manage hypoglycemia, asthma or diabetes. Accordingly, the district may administer or a student may be permitted to administer to themselves prescription (injectable and noninjectable) and/or nonprescription (noninjectable) medication at school.

The district shall designate personnel authorized to administer medications to students. Annual training shall be provided to designated personnel as required by law in accordance with guidelines approved by the Oregon Department of Education (ODE). When a licensed health care professional is not immediately available, trained personnel designated by the district may administer epinephrine, glucagon or another medication to a student as prescribed and/or allowed by Oregon law.

A current first-aid and CPR card is required for designated personnel.

The district reserves the right to reject a request for administration of medication at school, either by district personnel or student self-administration, if the medication is not necessary for the student to remain in school.

The superintendent and/or designee will require that an individualized health care plan and allergy plan is developed for every student with a known life-threatening allergy or a need to manage asthma, and an individualized health care plan for every student for whom the district has been given proper notice of a diagnosis of adrenal insufficiency. Such a plan will include provisions for administering medication and/or responding to emergency situations while the student is in school, at a school-sponsored activity, under the supervision of school personnel, in a before-school or after-school care program on school-owned property and in transit to or from school or a school-sponsored activity.

A student may be allowed to self-administer a medication for asthma, diabetes, hypoglycemia or severe allergies as prescribed by an Oregon licensed health care professional, upon written and signed request of the parent or guardian and subject to age-appropriate guidelines. This self-administration provision also requires a written and signed confirmation the student has been instructed by the Oregon licensed health care professional on the proper use of and responsibilities for the prescribed medication. A request to the

¹ Under proper notice given to the district by a student or student's parent or guardian.

district to administer or allow a student to self-administer prescription medication shall include a signed prescription and treatment plan from a prescriber².

A request to the district to administer or allow a student to self-administer nonprescription that is not approved by the Food and Drug Administration (FDA) shall include a written order from the student's prescriber that meets the requirements of law.

A written request and permission form signed by a student's parent or guardian, unless the student is allowed to access medical care without parental consent under state law³, is required and will be kept on file.

If the student is deemed to have violated Board policy or medical protocol by the district, the district may revoke the permission given to a student to self-administer medication.

Prescription and nonprescription medication will be handled, stored, monitored, disposed of and records maintained in accordance with established district administrative regulations governing the administration of prescription or nonprescription medications to students, including procedures for the disposal of sharps and glass.

A process shall be established by which, upon parent or guardian written request, a backup prescribed autoinjectable epinephrine is kept at a reasonably, secure location in the student's classroom as provided by state law.

A premeasured dose of epinephrine may be administered by trained, designated personnel to any student or other individual on school premises who the person believes in good faith is experiencing a severe allergic reaction, regardless of whether the student or individual has a prescription for epinephrine.

⁴Naloxone or any similar medication that is in any form available for safe administration and that is designed to rapidly reverse an overdose of an opioid drug may be administered by trained, designated personnel to any student or other individual on school premises who the person believes in good faith is experiencing an overdose of an opioid drug.

This policy shall not prohibit, in any way, the administration of recognized first aid to a student by district employees in accordance with established state law, Board policy and administrative regulation.

A school administrator, teacher or other district employee designated by the school administrator is not liable in a criminal action or for civil damages as a result of the administration, in good faith and pursuant to state law, of prescription and/or nonprescription medication.

² A registered nurse who is employed by a public or private school, ESD or local public health authority to provide nursing services at a public or private school may accept an order from a physician licensed to practice medicine or osteopathy in another state or territory of the U.S. if the order is related to the care or treatment of a student who has been enrolled at the school for not more than 90 days.

³ Subject to ORS 109.610, 109.640 and 109.675.

⁴ The district is not required to provide or administer this medication. If the district plans on providing and administering this medication this policy language and other associated bracketed policy language is required. If the district does not plan to provide or administer this medication, do not include this language or other associated bracketed language in this policy.

A school administrator, school nurse, teacher or other district employee designated by the school administrator is not liable in a criminal action or for civil damages as a result of a student's self-administration of medication, as described in Oregon Revised Statute (ORS) 339.866, if that person in good faith and pursuant to state law, assisted the student in self-administration of the medication.

A school administrator, school nurse, teacher or other district employee designated by the school administration is not liable in a criminal action or for civil damages as a result of the use of medication if that person in good faith administers autoinjectable epinephrine to a student or other individual with a severe allergy who is unable to self-administer the medication, regardless of whether the student or individual has a prescription for epinephrine, or administers naloxone or any similar medication that is in any form available for safe administration and that is designed to rapidly reverse an overdose of an opioid drug to a student or other individual who that person believes in good faith is experiencing an overdose of an opioid drug.

The district and the members of the Board are not liable in a criminal action or for civil damages as a result of the use of medication if any person in good faith, on school premises, including at a school, on school property under the jurisdiction of the district or at an activity under the jurisdiction of the district, administers autoinjectable epinephrine to a student or other individual with a severe allergy who is unable to self-administer the medication, regardless of whether the student or individual has a prescription for epinephrine, or administers naloxone or any similar medication that is in any form available for safe administration and that is designed to rapidly reverse an overdose of an opioid drug to a student or other individual who the person believes in good faith is experiencing an overdose of an opioid drug.

The superintendent shall develop administrative regulations as needed to meet the requirements of law and the implementation of this policy.

END OF POLICY

Legal Reference(s):

[ORS 109.610](#)
[ORS 109.640](#)
[ORS 109.675](#)
[ORS 332.107](#)
[ORS 339.866 - 339.871](#)

[ORS 433.800 - 433.830](#)
[ORS 475.005 - 475.285](#)
[OAR 166-400-0010\(17\)](#)
[OAR 166-400-0060\(29\)](#)

[OAR 333-055-0000 -055-0115](#)
[OAR 581-021-0037](#)
[OAR 581-022-2220](#)
[OAR 851-047-0030](#)
[OAR 851-047-0040](#)

Family Educational Rights and Privacy Act of 1974, 20 U.S.C. § 1232g (2018); Family Educational Rights and Privacy, 34 C.F.R. Part 99 (2019).

OREGON HEALTH AUTHORITY AND OREGON DEPARTMENT OF EDUCATION, *Medication Administration: A Manual for School Personnel*.

Ashland School District 5

Code: JHCD/JHCDA-AR
Revised/Reviewed: 3/14/16; 6/12/17; 4/25/22
Orig. Code: JHCD/JHCDA-AR

Medications**

Students may, subject to the provisions of this administrative regulation, have prescription or nonprescription medication administered by designated personnel, or may be permitted to administer prescription or nonprescription medication to themselves.

1. Definitions

- a. “Medication” means any drug, chemical compound, suspension or preparation in suitable form for use as a curative or remedial substance taken internally or externally but not injected except for premeasured doses of epinephrine, medication to treat adrenal insufficiency and glucagon to treat severe hypoglycemia. Medication includes any prescription for bronchodilators or autoinjectable epinephrine prescribed by a student’s Oregon licensed health care professional for asthma or severe allergies. ¹Medication also includes naloxone or any similar medication that is in any form available for the safe administration and that is designed to rapidly reverse an overdose of an opioid drug.
- b. “Prescription medication” means any medication that under federal or state law requires a prescription by a prescriber.
- c. “Nonprescription medication” means medication that under federal law does not require a prescription from a prescriber.
- d. “Adrenal crisis” means adrenal crisis as defined in Oregon Revised Statute (ORS) 433.800.
- e. “Adrenal insufficiency” means adrenal insufficiency as defined in ORS 433.800.
- f. “Notice of a diagnosis of adrenal insufficiency” means written notice to the district from a student or the parent or guardian of a student who has been diagnosed as adrenal insufficient with a copy of an order from the student’s primary care provider that includes the student’s diagnosis, description of symptoms indicating the student is in crisis, prescription for medication to treat adrenal insufficiency crisis and instructions for follow-up care after medication to treat adrenal insufficiency crisis has been administered.
- g. “Prescriber²” means a doctor of medicine or osteopathy, a physician assistant licensed to practice by the Board of Medical Examiners for the state of Oregon, an Oregon-licensed, advance practice registered nurse with prescriptive authority, a dentist licensed by the Board of Dentistry for the state of Oregon, an optometrist licensed by the Board of Optometry for the state of Oregon, a naturopathic physician licensed by the Board of Naturopathy for the state of Oregon or a pharmacist licensed by the Board of Pharmacy for the state of Oregon.
- h. “Qualified trainer” means a person who is familiar with the delivery of health services in a school setting and who is a registered nurse licensed by the Oregon State Board of Nursing, a doctor of medicine or osteopathy or a physician assistant licensed by the Board of Medical Examiners for the state of Oregon or a pharmacist licensed by the Board of Pharmacy for the state of Oregon.

¹ If the district plans to provide and/or administer naloxone in the district this language and other associated bracketed language is required. If the district does not plan to provide and/or administer naloxone in the district do not include this language or other associated bracketed language.

² A registered nurse who is employed by a public or private school, ESD or local public health authority to provide nursing services at a public or private school may accept an order from a physician licensed to practice medicine or osteopathy in another state or territory of the U.S. if the order is related to the care or treatment of a student who has been enrolled at the school for not more than 90 days.

- i. “Severe allergy” means a life-threatening hypersensitivity to a specific substance such as food, pollen, dust or insect sting.
- j. “Asthma” means a chronic inflammatory disorder of the airways that requires ongoing medical intervention.
- k. “Designated personnel” means the school personnel designated to administer medication pursuant to district policy and procedure.

2. Designated Staff/Training

- a. The principal will designate personnel authorized to administer prescription or nonprescription medication to a student while the student is in school, at a school-sponsored activity, under the supervision of school personnel, in a before-school or after-school care program on school-owned property and in transit to or from school or a school-sponsored activity, as required by Oregon law. The principal will supervise and ensure building and activity practices and procedures are consistent with the requirements of law, rules and this administrative regulation.
- b. The principal will ensure the training required by Oregon law is provided to designated personnel. Training must be conducted by a qualified trainer. Training will be provided annually to designated personnel authorized to administer medication to students. The first year and every third year of training requires in-person instruction; during the intervening years, designated personnel may complete an online training that has been approved by the Oregon Department of Education (ODE) so long as a trainer is available within a reasonable amount of time following the training to answer questions and provide clarification.
- c. Training will provide an overview of applicable provisions of Oregon law, administrative rules, district policy and administrative regulations and include, but not be limited to, the following: safe storage, handling, monitoring medication supplies, disposing of medications, record keeping and reporting of medication administration and errors in administration, emergency medical response for life-threatening side effects, allergic reactions or adrenal insufficiency and student confidentiality. Materials as recommended and/or approved by the ODE will be used.
- d. A copy of the district’s policy and administrative regulation will be provided to all staff authorized to administer medication to students and others, as appropriate.
- e. A statement that the designated personnel has received the required training will be signed by the staff member and filed in the district office.

3. Administering Premeasured Doses of Epinephrine to a Student or Other Individual

A premeasured dose of epinephrine may be administered by trained, designated personnel to any student or other individual on school premises who the person believes in good faith is experiencing a severe allergic reaction, regardless of whether the student or individual has a prescription for epinephrine.

4. ³Administering Naloxone or Other Similar Medication to a Student or Other Individual

Naloxone or any other similar medication that is in any form available for safe administration and that is designed to rapidly reverse an overdose of an opioid drug may be administered by trained, designated personnel to any student or other individual on school premises who the person believes in good faith is experiencing an opioid overdose.

³ Ibid. p. 1.

5. Administering of Medication to a Student Experiencing Symptoms of Adrenal Crisis

A student experiencing symptoms of adrenal crisis while the student is in school, at a school-sponsored activity, while under the supervision of school personnel, in a before-school or after-school care program on school-owned property and in transit to or from a school or a school-sponsored activity, may be treated by designated personnel and shall be subject to the following:

- a. Upon notice of a diagnosis of adrenal insufficiency, as defined in Oregon Administrative Rule (OAR) 581-021-0037, the building principal will designate one or more school personnel to be responsible for administering the medication to treat adrenal insufficiency;
- b. The designated personnel will successfully complete training to administer medication to treat a student who has adrenal insufficiency and is experiencing symptoms of adrenal crisis in accordance with the rules adopted by the Oregon Health Authority;
- c. The student or the student's parent or guardian must provide adequate supply of the student's prescribed medication to the district;
- d. The district will require the development of an individualized health care plan for the student that includes protocols for preventing exposures to allergens, and establishes if or when a student may self-carry prescription medication when the student has not been approved to self-administer medication;
- e. In the event that a student experiences symptoms of adrenal crisis and the designated personnel determines the medication to treat adrenal insufficiency should be administered, any available staff member will immediately call 911 and the student's parent or guardian.

6. Administering Medication to a Student

- a. A request to permit designated personnel to administer medication to a student may be approved by the district and is subject to the following:
 - (1) A written request for designated personnel to administer prescription medication to a student, if because of the prescribed frequency or schedule, the medication must be given while the student is in school, at a school-sponsored activity, while under the supervision of school personnel and in transit to or from school or a school-sponsored activity, must be submitted to the school office and shall include:
 - (a) The written permission of the student's parent or guardian or the student if the student is allowed to seek medical care without parental consent pursuant to ORS 109.610, 109.640 or 109.675; and

The written instruction from the prescriber for the administration of the medication to the student that includes:

- (i) Name of the student;
- (ii) Name of the medication;
- (iii) Method of administration;
- (iv) Dosage;
- (v) Frequency of administration;
- (vi) Other special instructions from the prescriber, if any; and
- (vii) Signature of the prescriber.

The prescription label prepared by a pharmacist at the direction of the prescriber, will be considered to meet this requirement if it contains the information listed in (i)-(vi) above.

- (2) A written request for designated personnel to administer nonprescription medication to a student must be submitted to the school office and is subject to the following:
 - (a) The nonprescription medication is necessary for the student to remain in school;

- (b) The nonprescription medication is provided in the original manufacturer's container by the parent or guardian of the student;
- (c) The written instruction from the student's parent or guardian for the administration of the nonprescription medication includes:
 - (i) Name of the student;
 - (ii) Name of the medication;
 - (iii) Method of administration;
 - (iv) Dosage;
 - (v) Frequency of administration;
 - (vi) Other special instructions, if any; and
 - (vii) Signature of the student's parent or guardian.

If the written instruction is not consistent with the manufacturer's guidelines for the nonprescription medication, the written instruction must also include a written order allowing the inconsistent administration signed by a prescriber.

- (d) If the nonprescription medication is not approved by the Food and Drug Administration (FDA), a written order from the student's prescriber is required and will include:
 - (i) Name of the student;
 - (ii) Name of the medication;
 - (iii) Dosage;
 - (iv) Method of administration;
 - (v) Frequency of administration;
 - (vi) A statement that the medication must be administered while the student is in school;
 - (vii) Other special instructions, if any; and
 - (viii) Signature of the prescriber.
- b. An individualized health care and allergy plan will be developed for a student with a known life-threatening allergy and will include protocols for preventing exposures to allergens and procedures for responding to life-threatening allergic reactions while the student is in school, at a school-sponsored activity, while under the supervision of school personnel, in a before-school or after-school care program on school-owned property and in transit to or from school or a school-sponsored activity, and will include a determination on if or when the student may self-carry prescription medication if the student has not been approved to self-administer medication;
- c. It is the student's parent or guardian's, or the student's if the student is allowed to seek medical care without parental consent, responsibility to ensure that an adequate amount of medication is on hand at the school for the duration of the student's need to take medication;
- d. It is the student's parent or guardian's, or the student's if the student is allowed to seek medical care without parental consent, responsibility to ensure that the school is informed in writing of any changes in medication instructions;
- e. In the event a student refuses medication, the parent or guardian will be notified immediately, except where a student is allowed to seek medical care without parental consent. No attempt will be made to administer medication to a student who refuses a medication;
- f. Any error in administration of a medication will be reported to the parent or guardian immediately, except where a student is allowed to seek medical care without parental consent, and documentation will be made on the district's *Medication Administration Error Report Form*. Errors include, but are not limited to, administering medication to the wrong student, administering the wrong medication, dose, frequency of administration or method of administration;
- g. Medication shall not be administered until the necessary permission form and written instructions have been submitted as required by the district.

7. Administration of Medication by a Student to Themselves

- a. A student, including a student in grade K through 12 with asthma or severe allergies, may be permitted to administer medication to themselves without assistance from designated personnel and is subject to the following:
 - (1) A student must demonstrate the ability, developmentally and behaviorally, to self-administer prescription medication and must have:
 - (a) A permission form from a parent or guardian, except when the student is allowed to seek medical care without parental consent pursuant to ORS 109.610, 109.640 or 109.675, and other documentation requested by the district must be submitted for self-medication of all prescription medications;
 - (b) If the student has asthma, diabetes and/or a severe allergy, a medication that is prescribed by a prescriber and a written treatment plan developed by a prescriber or other Oregon licensed health care professional for managing of the student's asthma, diabetes and/or severe allergy, and directs use by the student while the student is in school, at a school-sponsored activity, while under the supervision of school personnel, in a before-school or after-school care program on school-owned property and in transit to or from school or a school-sponsored activity. The prescriber will include acknowledgment that the student has been instructed in the correct and responsible use of the prescribed medication;
 - (c) The permission to self-administer the medication from a building administrator and a prescriber or registered nurse practicing in a school setting.
 - (2) A student must demonstrate the ability, developmentally and behaviorally, to self-administer nonprescription medication and must have:
 - (a) The written permission of the student's parent or guardian, except when the student is allowed to seek medical care without parental consent pursuant to ORS 109.610, 109.640 or 109.675;
 - (b) The student's name affixed to the manufacturer's original container; and
 - (c) The permission to self-administer medication from a building administrator.
 - (3) A student must demonstrate the ability, developmentally and behaviorally, to self-administer nonprescription medication that is not approved by the FDA and must have:
 - (a) The written permission of the student's parent or guardian, except when the student is allowed to seek medical care without parental consent pursuant to ORS 109.610, 109.640 or 109.675; and
 - (b) A written order from the student's prescriber that includes:
 - (i) Name of the student;
 - (ii) Name of the medication;
 - (iii) Dosage;
 - (iv) Method of administration;
 - (v) Frequency of administration;
 - (vi) A statement that the medication must be administered while the student is in school;
 - (vii) Other special instructions, if any; and
 - (viii) Signature of the prescriber.
- b. The student may have in their possession only the amount of medication needed for that school day, except for manufacturer's packaging that contains multiple dosage, the student may carry one package, such as, but not limited to, autoinjectable epinephrine or bronchodilators/inhalers;

- c. Sharing and/or borrowing of any medication with another student is strictly prohibited;
 - d. For a student who has been prescribed bronchodilators or epinephrine, the designated personnel will request that the parent or guardian provide backup medication for emergency use by that student. Backup medication, if provided, will be kept at the student's school in a location to which the student has immediate access in the event the student has an asthma and/or severe allergy emergency;
 - e. Upon written request from a parent or guardian, and with a prescriber's written statement that the lack of immediate access to a backup autoinjectable epinephrine may be life threatening to a student, and the location the school stores backup medication is not located in the student's classroom, a process shall be established to allow the backup autoinjectable epinephrine to be kept in a reasonably secure location in the student's classroom;
 - f. A student shall not administer medication to themselves until the necessary permission form and written instructions have been submitted as required by the district;
 - g. Permission for a student to administer medication to themselves may be revoked if the student violates the Board policy and/or this administrative regulation;
 - h. A student may be subject to discipline, up to and including expulsion, as appropriate;
 - i. A student permitted to administer medication to themselves may be monitored by designated personnel to monitor the student's response to the medication.
8. Handling, Monitoring and Safe Storage of Medication Supplies for Administering Medication to Students
- a. Medication administered by designated personnel to a student or self-administered by a student, must be delivered to the school in its original container, accompanied by the permission form and written instructions, as required above.
 - b. Medication in capsule or tablet form and categorized as a sedative, stimulant, anticonvulsant, narcotic analgesic or psychotropic medication will be counted by designated personnel in the presence of another district employee upon receipt, documented in the student's medication log and routinely monitored during storage and administration. Discrepancies will be reported to the principal immediately and documented in the student's medication log. For such medication not in capsule or tablet form, standard measuring and monitoring procedures will apply.
 - c. Designated personnel will follow the written instructions of the prescriber and the student or the student's parent or guardian, and training guidelines as may be recommended by the ODE for administering all forms of prescription and/or nonprescription medications.
 - d. Medication will be secured as follows:
 - (1) Non-refrigerated medications will be stored in a locked cabinet, drawer or box used solely for the storage of medication;
 - (2) Medications requiring refrigeration will be stored in a separate refrigerator used solely for the storage of medication;
 - (3) Access to medication storage keys will be limited to the principal and designated personnel.
 - e. Designated personnel will be responsible for monitoring all medication supplies and for ensuring medication is secure at all times, not left unattended after administering and that the medication container is properly sealed and returned to storage.
 - f. In the event medication is running low or an inadequate dosage is on hand to administer the medication, the designated personnel will notify the student's parent or guardian or the student (in situations involving ORS 109.610, 109.640 and 109.675) immediately.

9. Emergency Response

- a. Designated personnel will notify 911 or other appropriate emergency medical response systems and administer first aid, as necessary, in the event of life-threatening side effects that result from district-administered medication or from student self-medication or allergic reactions. The parent or guardian, school nurse and principal will be notified immediately.
- b. Minor adverse reactions that result from district-administered medication or from student self-medication will be reported to the parent or guardian immediately, except when the student is allowed to seek medical care without parental consent pursuant to ORS 109.610, 109.640 or 109.675.
- c. Any available district staff will immediately call 911 and the student's parent or guardian if the designated personnel believes the student is experiencing symptoms of adrenal crisis and plans to administer medication.

10. Disposal of Medications

- a. Medication not picked up by the student's parent or guardian, or the student when allowed pursuant to ORS 109.610, 109.640 and 109.675, at the end of the school year or within five school days of the end of the medication period, whichever is earlier, will be disposed of by designated personnel in a nonrecoverable fashion as follows:
 - (1) Medication will be removed from its original container and personal information will be destroyed;
 - (2) Solid medications will be crushed, mixed or dissolved in water, liquid medications will be mixed or dissolved in water; and
 - (3) Mixed with an undesirable substance, e.g., coffee grounds, kitty litter, flour; and
 - (4) Placed in impermeable non-descriptive containers, e.g., empty cans or sealable bags, and placed in the trash.

Prescriptions will be flushed down the toilet **only** if the accompanying patient information specifically instructs it is safe to do so.

Other medication will be disposed of in accordance with established training procedures including sharps and glass.

- b. All medication will be disposed of by designated personnel in the presence of another school employee and documented as described in Section 10, below.

11. Transcribing, Recording and Record Keeping

- a. A medication log will be maintained for each student administered medication by the district. The medication log will include, but not be limited to:
 - (1) The name of the student, name of medication, dosage, method of administration, date and time of administration, frequency of administration and the name of the person administering the medication;
 - (2) Student refusals of medication;
 - (3) Errors in administration of medication;
 - (4) Incidents of emergency and minor adverse reaction by a student to medication;
 - (5) Discrepancies in medication supply;
 - (6) Disposal of medication including date, quantity, manner in which the medication was destroyed and the signature of the staff involved.
- b. All records relating to administration of medications, including permissions and written instructions, will be maintained in a separate medical file apart from the student's education record file unless otherwise related to the student's educational placement and/or

individualized education program. Records will be retained in accordance with applicable provisions of OAR 166-400-0010(17) and OAR 166-400-0060(29).

- c. Student health information will be kept confidential. Access shall be limited to those designated personnel authorized to administer medication to students, the student and their parent or guardian. Information may be shared with other staff with a legitimate educational interest in the student or others as may be authorized by the parent or guardian in writing or others as allowed under state and federal law.

OSBA Model Sample Administrative Regulation

Code: JHCD-AR

Adopted:

Medications**/*

{Required administrative regulation. The requirement comes from ORS 339.866 (2).}

Students may, subject to the provisions of this administrative regulation, have prescription or nonprescription medication administered by designated district personnel, or may be permitted to administer prescription or nonprescription medication to themselves.

1. Definitions¹

- a. ["Administer" means the direct application of a drug or device whether by injection, inhalation, ingestion, or any other means, to the body of a patient or research subject by: (1) a practitioner or the practitioner's authorized agent; or (2) the patient or research subject at the direction of the practitioner. (ORS 689.005)]
- b. "Adrenal crisis" means a sudden, severe worsening of symptoms associated with adrenal insufficiency, such as severe pain in the lower back, abdomen or legs, vomiting, diarrhea, dehydration, low blood pressure or loss of consciousness. (ORS 433.800)
- c. "Adrenal insufficiency" means a hormonal disorder that occurs when the adrenal glands do not produce enough adrenal hormones. (ORS 433.800)
- d. "Asthma" means a chronic inflammatory disorder of the airways that requires ongoing medical intervention. (ORS 339.866)
- e. "Delegation" means a formal delegation of a nursing procedure by a registered nurse to district personnel in accordance with the Oregon Nurse Practice Act. (OAR Chapter 851)
- f. "Designated personnel" means the school personnel designated and trained to administer medication pursuant to district policy and procedure.
- g. "Medication" means medication that is not injected; premeasured doses of epinephrine that are injected; medication that is available for treating adrenal insufficiency; and Naloxone or any similar medication that is in any form available for safe administration and that is designed to rapidly reverse an overdose of an opioid drug. "Medication" also means any prescription for bronchodilators or autoinjectable epinephrine prescribed by a student's Oregon licensed health care professional for asthma or severe allergies. "Medication" does not include nonprescription sunscreen. (ORS 339.866; ORS 339.867)
- h. "Nonprescription medication" means nonprescription drugs as defined in ORS 689.005, which means drugs that may be sold without prescription and that are prepackaged for use by the consumer and labeled in accordance with the requirements of the statutes and regulations of this state and the federal government. (OAR 581-021-0037)
- i. "Notice of a diagnosis of adrenal insufficiency" means written notice to the district from the parent or guardian of a student who has been diagnosed as adrenal insufficient with a copy of an order from the student's primary care provider that includes the student's diagnosis, description of symptoms indicating the student is in crisis, prescription for medication to treat

¹ There are several laws that apply to medications in schools. Some of these laws have unique definitions that may apply in specific situations. If the applicable law uses a definition that varies from the definition here, use the definition in the law.

adrenal insufficiency crisis, and instructions for follow-up care after medication to treat adrenal insufficiency crisis has been administered. (OAR 581-021-0037)

- j. **“Opioid overdose” means a medical condition that causes depressed consciousness, depressed respiratory function or the impairment of vital bodily functions as a result of ingesting opioids. (ORS 689.800)**
- k. “Prescriber²” means a “practitioner” as defined in ORS 689.005, which means a person licensed and operating within the scope of such license to prescribe, dispense, conduct research with respect to or administer drugs in the course of professional practice or research: (a) in this state; or (b) in another state or territory of the U.S. if the person does not reside in Oregon and is registered under the federal Controlled Substances Act. (OAR 581-021-0037)
- l. “Prescription medication” means a “prescription drug” as defined in ORS 689.005, which means a drug that is: required by federal law, prior to being dispensed or delivered, to be labeled with “Caution: Federal law prohibited dispensing without prescription” or “Caution: Federal law restricts this drug to use by or on the order of a licensed veterinarian”; or required by any applicable federal or state law or regulation to be dispensed on prescription only or is restricted to use by practitioners only.
- m. “Severe allergy” means a life-threatening hypersensitivity to a specific substance such as food, pollen, or dust. (ORS 339.866)
- n. “Short-acting opioid antagonist” means any short-acting drug approved by the U.S. Food and Drug Administration for the complete or partial reversal of an opioid overdose. (ORS 689.800)

2. Designated Staff/Training

- a. Medications, including injectable medications, may be administered by trained personnel as part of a formal delegation by a registered nurse.
- b. The principal, in consultation with the school nurse, will designate district personnel authorized to administer prescription or nonprescription medication to a student which takes into account when the student is in school, at a district-sponsored activity, under the supervision of district personnel, or in transit to or from school-or district-sponsored activities, and may include when a student is in a before-school or after-school care program on school-owned property when required by law. The principal will supervise and ensure building and activity practices and procedures are consistent with the requirements of law, rules, policy and this administrative regulation.
- c. The district will provide staff who are designated personnel to administer prescription or nonprescription medication access to a school nurse.
- d. The principal will ensure the annual training required by Oregon law is provided to designated district personnel. Training must be conducted by a qualified trainer, which is a person who is familiar with the delivery of health services in a school setting and who is either a registered nurse licensed by the Oregon State Board of Nursing or a prescriber. District personnel designated to administer epinephrine, glucagon, and medication to treat adrenal insufficiency shall be trained using related training developed by the Oregon Health Authority (OHA). The first training and every third training thereafter shall be provided in-person³. During

² A registered nurse who is employed by a district or local public health authority to provide nursing services at a district may accept an order from a physician licensed to practice medicine or osteopathy in another state or territory of the U.S. if the order is related to the care or treatment of a student who has been enrolled at the district for not more than 90 days.

³ An online training may qualify as “in-person” when these measures are met: content is provided via synchronous, interactive online sessions with a trainer and learners visible on screen; trainers must be licensed and work within their scope of practice;

- subsequent years, designated district personnel may complete an online training so long as a trainer is available following the training to answer questions and provide clarification.
- e. The training for district personnel will provide an overview of applicable provisions of Oregon law, administrative rules, district policy and administrative regulations and include, but not be limited to, discussion of the following: safe storage, administration, handling and disposing of medications; accessibility of medication during an emergency; record keeping; whether response to medication should be monitored by designated personnel and the role of designated personnel in such monitoring; emergency medical response procedures following administration of the medication; confidentiality of health information; and assessment of gained knowledge. Training as recommended and/or approved by ODE will be used.
 - f. The district shall maintain documentation of district personnel's completion of training in accordance with OAR 166-400-0010.

3. Administering Premeasured Doses of Epinephrine to a Student or Other Individual

A premeasured dose of epinephrine may be administered by trained district personnel to any student or other individual on district premises who the person believes in good faith is experiencing a severe allergic response, regardless of whether the student or individual has a prescription for epinephrine.

4. Administering Short-Acting Opioid Antagonists

[⁴] A short-acting opioid antagonist may be administered by any district personnel⁵ to any student or other individual, on school premises who the individual administering the short-acting opioid antagonist believes in good faith is experiencing an overdose of an opioid drug.

The [principal] [or [school] [district] nurse] shall immediately notify the parent or guardian of a minor student enrolled in a school within the district when a short-acting opioid antagonist is administered to the student while at school, on school property under the jurisdiction of the district or at any activity under the jurisdiction of the district.]

The district shall provide to the parent or legal guardian of each minor student enrolled in a school in the district information regarding short-acting opioid antagonists. The information will include at least:

- a. A description of short-acting opioid antagonists and their purpose;
- b. A statement regarding, in an emergency situation, the risks of administering to an individual a short-acting opioid antagonist and the risks of not administering to an individual a short-acting opioid antagonist;
- c. A statement identifying which schools in the district, if any, have short-acting opioid antagonists, and the necessary medical supplies to administer short-acting opioid antagonists, onsite and available for emergency situations; and

and include in-person, skills demonstration for training developed by the Oregon Health Authority for epinephrine, glucagon, and for medication to treat adrenal insufficiency.

⁴ {If the district plans to provide for, and administer a short-acting opioid antagonist, this bracketed language is highly recommended. If the district does not intend to provide and/or administer this medication, there is no requirement to include this language.}

⁵ Including district personnel who have not received medication administration training.

- d. A statement that a representative of the district may administer a short-acting opioid antagonist to a student in an emergency if the student appears to be unconscious and experiencing an opioid overdose.

5. Administering of Medication to a Student Experiencing Symptoms of Adrenal Crisis

A student experiencing symptoms of adrenal crisis while the student is in school, at a district-sponsored activity, while under the supervision of school personnel, in a before-school or after-school care program on school-owned property and/or in transit to or from a school or a district-sponsored activity, may be treated by designated personnel and shall be subject to the following:

- a. Upon notice of a diagnosis of adrenal insufficiency, as defined in Oregon Administrative Rule (OAR) 581-021-0037, the building principal of the school the student attends will designate one or more district personnel to receive training and be responsible for administering the medication to treat adrenal insufficiency to a student in the event the student exhibits symptoms the district personnel believe in good faith indicate the student is experiencing symptoms of adrenal crisis;
- b. The designated personnel will successfully complete required training to administer medication to treat a student who has adrenal insufficiency and is experiencing symptoms of adrenal crisis;
- c. The student's parent or guardian must provide adequate supply of the student's prescribed medication to the district;
- d. The district will develop an individualized health care plan for the student;
- e. In the event that a student experiences symptoms of adrenal crisis and the designated personnel determines the medication to treat adrenal insufficiency should be administered, any available district staff member will immediately call 911 and the student's parent or guardian.

6. Administering Medication to a Student

- a. A request to permit designated personnel to administer medication to a student may be approved by the district and is subject to the following:
 - (1) A written request for designated personnel to administer prescription medication to a student, if because of the prescribed frequency or schedule, the medication must be given while the student is in school, at a school-sponsored activity, while under the supervision of school personnel and in transit to or from school or a school-sponsored activity, must be submitted to the school office and shall include:
 - (a) The written permission of the student's parent or guardian; and
 - (b) The written instruction from the prescriber for the administration of the medication to the student that includes:
 - (i) Name of the student;
 - (ii) Name of the medication;
 - (iii) Method of administration;
 - (iv) Dosage;
 - (v) Frequency of administration;
 - (vi) Other special instructions from the prescriber, if any; and
 - (vii) Signature of the prescriber.

The prescription medication is provided in the original prescription packaging by the student's parent or guardian. The prescription label prepared by a pharmacist at the direction of the prescriber, will be sufficient to meet this requirement if it contains the information listed in (i)-(vi) above.

- (2) A written request for designated personnel to administer nonprescription medication to a student must be submitted to the school office and is subject to the following:
 - (a) The nonprescription medication is necessary for the student to remain in school;
 - (b) The nonprescription medication is:
 - (i) Provided in the original manufacturer's container by the student's parent or guardian; or
 - (ii) Is part of the district's stock medication program in compliance with the Oregon Board of Pharmacy rules including OAR 855-035-0005.
 - (c) The written instruction and permission from the student's parent or guardian for the administration of the nonprescription medication⁶ includes:
 - (i) Name of the student;
 - (ii) Name of the medication;
 - (iii) Method of administration;
 - (iv) Dosage;
 - (v) Frequency of administration;
 - (vi) Other special instructions, if any; and
 - (vii) Signature of the student's parent or guardian.

If the written instruction is not consistent with the manufacturer's guidelines for the nonprescription medication, the written instruction must also include a written order allowing the inconsistent administration signed by a prescriber.

- (d) If the nonprescription medication is not approved by the Food and Drug Administration (FDA), a written order from the student's prescriber is required and will include:
 - (i) Name of the student;
 - (ii) Name of the medication;
 - (iii) Dosage;
 - (iv) Method of administration;
 - (v) Frequency of administration;
 - (vi) A statement that the medication must be administered while the student is in school;
 - (vii) Other special instructions, if any; and
 - (viii) Signature of the prescriber.

⁶ For nonprescription medication that is not approved by the Food and Drug Administration (FDA), see requirements in 6.a.(2)(d).

- b. The principal or designee will require an individualized health care plan or allergy plan be developed for every student with a need to manage asthma or a known life-threatening allergy. A plan will include protocols for preventing exposures to allergens and procedures for responding to life-threatening allergic responses, and include provisions for administering medication and/or responding to emergency situations while the student is in school, at a school-sponsored activity, under the supervision of school personnel, in a before-school or after-school care program on school-owned property and in transit to or from school or a school-sponsored activity;
- c. A student being administered a medication may be monitored by designated personnel to monitor the student's response to the medication;
- d. A determination will be made by the district on if or when the student may self-carry prescription medication if the student has not been approved to self-administer medication;
- e. It is the student's parent or guardian's responsibility to ensure that an adequate amount of medication is on hand at the school for the duration of the student's need to take medication;
- f. It is the student's parent or guardian's responsibility to ensure that the school is informed in writing of any changes in medication instructions;
- g. In the event a student refuses medication, the parent or guardian will be notified immediately. No attempt will be made to administer medication to a student who refuses a medication;
- h. Any error in administration of a medication will be reported to the parent or guardian immediately and documented on a medication administration record. Errors include, but are not limited to, administering medication to the wrong student, administering the wrong medication, dose, frequency of administration or method of administration;
- i. Medication shall not be administered until the necessary permission form and written instructions have been submitted and received as required by the district.

7. Administration of Medication by a Student to Themselves

- a. A student, including a student in grade K through 12 with asthma or severe allergies, may be permitted to administer prescription or nonprescription medication to themselves without assistance from designated personnel and is subject to the following:
 - (1) A student must demonstrate the ability, developmentally and behaviorally, to self-administer prescription medication and must have:
 - (a) The written permission from a parent or guardian and other documentation requested by the district must be submitted for self-medication of all prescription medications;
 - (b) If the student has asthma or a severe allergy, a medication that is prescribed by a prescriber and a written treatment plan developed by a prescriber or other Oregon licensed health care professional for managing of the student's asthma, diabetes and/or severe allergy, and directs use by the student while the student is in school, at a school-sponsored activity, while under the supervision of school personnel, in a before-school or after-school care program on school-owned property and in transit to or from school or a school-sponsored activity. The prescriber will include acknowledgment that the student has been instructed in the correct and responsible use of the prescribed medication;
 - (c) The permission to self-administer the medication from a building administrator and a prescriber or registered nurse practicing in a district setting.

- (2) A student must demonstrate the ability, developmentally and behaviorally, to self-administer nonprescription medication⁷ and must have:
 - (a) The written permission of the student's parent or guardian;
 - (b) The student's name affixed to the manufacturer's original container; and
 - (c) The permission to self-administer medication from a building administrator.
- (3) A student must demonstrate the ability, developmentally and behaviorally, to self-administer nonprescription medication that is not approved by the FDA and must have:
 - (a) The written permission of the student's parent or guardian; and
 - (b) A written order from the student's prescriber that includes:
 - (i) Name of the student;
 - (ii) Name of the medication;
 - (iii) Dosage;
 - (iv) Method of administration;
 - (v) Frequency of administration;
 - (vi) A statement that the medication must be administered while the student is in school, at a district-sponsored activity, under the supervision of district personnel, or in transit to or from school or district-sponsored activities;
 - (vii) Other special instructions, if any; and
 - (viii) Signature of the prescriber.
- b. A determination will be made by the district on if or when the student may self-carry prescription medication if the student has not been approved to self-administer medication;
- c. A student may have in their possession only the amount of medication needed for that school day, except for manufacturer's packaging that contains multiple dosage, the student may carry one package, such as, but not limited to, autoinjectable epinephrine or bronchodilators/inhalers;
- d. The sharing and/or borrowing by a student of any medication with another student is strictly prohibited⁸;
- e. The district personnel will request backup medication, when the medication is to treat a student's asthma or severe allergy emergency, from the student's parent or guardian. Backup medication, if provided by a student's parent or guardian, will be kept at the student's school in a location to which the student has immediate access in the event the student has an asthma and/or severe allergy emergency;
- f. A student shall not administer medication to themselves until the necessary permission form and written instructions have been submitted as required by the district;
- g. The permission for a student to administer medication to themselves may be revoked if the student does not responsibly self-administer the medication or abuses the use of the medication as determined by district personnel;
- h. A student may be subject to discipline, up to and including expulsion, as appropriate for violations of these procedures;

⁷ For nonprescription medication that is not approved by the Food and Drug Administration (FDA), see requirements in 7.a.(3).

⁸ [Except for short-acting opioid antagonists.]

- i. A student permitted to administer medication to themselves may be monitored by designated personnel to monitor the student's response to the medication~~[;]~~ [;]
- j. ~~[The district allows the application of and use by students of nonprescription sunscreen, including sunscreen that contains para-aminobenzoic acid, without any required documentation from a licensed health care professional per ORS 339.874.]~~

8. Handling, Monitoring and Safe Storage of Medication Supplies for Administration of Medication

- a. Any medication must be delivered to the school in its original manufacturer's or current prescription container, accompanied by the permission form and written instructions, as required above.
- b. Prescription medication must always be the most current prescription and kept in the original, labeled container.
- c. Nonprescription medication must be kept in original manufacturer's bottle or box.
- d. ~~[Never administer medication sent to school in unlabeled containers.]~~
- e. ~~[Never repackage medication into a plastic bag or other container for any reason.]~~
- f. ~~[Medication in any form categorized as a sedative, stimulant, anti-convulsive, narcotic analgesic or psychotropic medication will be counted or measured by designated personnel or parent or guardian in the presence of another district employee upon receipt and initialed by the two individuals who counted or witnessed the procedure], documented in the student's medication administration record (MAR) and routinely monitored during storage and administration. Any discrepancies will be reported to the [school] [district] nurse or principal immediately and documented in the student's MAR. For such medication not in capsule or tablet form, standard measuring and monitoring procedures will apply.]~~
- g. Designated personnel will follow the written instructions of the prescriber and the student's parent or guardian, and training guidelines as may be recommended by ODE for administering all forms of prescription and/or nonprescription medications.
- ~~h. [Medication will be secured as follows:~~
 - ~~(1) Nonrefrigerated medications will be stored in a locked cabinet, drawer or box in a secure area;~~
 - ~~(2) Medications requiring refrigeration will be stored in a locked box in a refrigerator or in a separate refrigerator used solely for the storage of medication in a secure area;~~
 - ~~(3) Access to medication storage keys will be limited to the principal and designated personnel.]~~
- ~~i.h. [Designated personnel will be responsible for monitoring all medication supplies and for ensuring medication is secure at all times, not left unattended after administering and that the medication container is properly sealed and returned to storage.]~~
- ~~j.i. When medication is running low or an inadequate dosage is on hand to administer the medication, the designated personnel will notify the student's parent or guardian immediately.~~

9. Emergency Response

- a. Designated personnel will immediately call 911 or other appropriate emergency medical response systems and administer first aid, as necessary, in the event of life-threatening side effects and allergic reactions, including the administration of epinephrine. The parent or guardian[, ~~[school] [district] nurse]~~ and principal will be notified immediately.
- b. Adverse reactions which result from district-administered medication or from student self-medication will be reported to the parent or guardian immediately.

- c. Any available district staff will immediately call 911 and the student's parent or guardian if the designated personnel believes the student is experiencing symptoms of adrenal crisis and plans to administer medication.
- d. Any available staff will immediately call 911 when a short-acting opioid antagonist is administered to any student or other individual on district premises.

10. Disposal of Medications

- a. ~~Medication not picked up by the student's parent or guardian, at the end of the school year or within five school days of the end of the medication period, whichever is earlier, will be disposed of by designated personnel in the presence of another school employee. The medication may be disposed through a designated drug take-back collection program or in a nonrecoverable fashion as follows:~~
 - ~~(1) Medication will be removed from its original container and personal information will be destroyed;~~
 - ~~(2) Mix with an undesirable substance, e.g., coffee grounds, used cat litter;~~
 - ~~(3) Place in a plastic bag or other sealable container, e.g., such as an empty plastic container; and~~
 - ~~(4) Place the sealed container with the mixture in the trash as close to garbage pickup time as possible, to prevent theft and misuse.]~~
- b. ~~Prescriptions will never be flushed down the toilet or drain or burnt with other waste.]~~
- c. ~~Sharps and glass will be disposed of in accordance with state guidelines.]~~
- d. ~~All medication will be disposed of by designated personnel following DEQ guidelines and documented on the student's MAR as described below.]~~

11. Transcribing, Recording and Record Keeping

- a. A medication administration record (MAR) will be maintained for each student administered medication by the district. ~~The MAR will be in paper⁹ or electronic form and will include, but not be limited to:~~
 - ~~(1) The full name of the student, date of birth, name of medication, dosage, method of administration, date and time of administration, frequency of administration and the name of the person administering the medication;~~
 - ~~(2) Student refusals of medication;~~
 - ~~(3) Errors in administration of medication;~~
 - ~~(4) Incidents of emergency and minor adverse reaction by a student to medication;~~
 - ~~(5) Discrepancies in medication supply;~~
 - ~~(6) Disposal of medication including date, quantity, manner in which the medication was destroyed and the signature of the staff involved.]~~
- b. A MAR for medication administered as part of an IEP goal should be maintained in the IEP record at the end of each school year.

⁹ If a paper record is kept, the record will be documented in blue or black ink, and never in pencil or with use of white-out.

- c. All records relating to administration of medications, including permissions and written instructions, will be maintained. Records will be retained in accordance with applicable provisions of OAR 166-400-0010(17) and OAR 166-400-0060(29).
- d. All records relating to the training of designated district personnel will be maintained by the district in accordance with applicable provisions of OAR 166-400-0010.
- e. Student health information will be kept confidential. Access shall be limited to those designated personnel authorized to administer medication to students, the student and their parent or guardian. Information may be shared with school personnel with a legitimate educational interest in the student or others authorized by the parent or guardian in writing or others as allowed under state and federal law.

Non-liability Provisions for Administration of Prescription and Nonprescription Medications and Short-Acting Opioid Antagonists

A school administrator, teacher or other school employee designated by the school administrator is not liable in a criminal action or for civil damages as a result of the administration of nonprescription medication, if the school administrator, teacher or other school employee in good faith administers nonprescription medication to a student pursuant to written permission and instructions of the student's parents or guardian.

A school administrator, teacher or other school employee designated by the school administrator is not liable in a criminal action or for civil damages as a result of the administration of prescription medication, if the school administrator, teacher or other school employee in compliance with the instructions of a physician, physician assistant, nurse practitioner, naturopathic physician or clinical nurse specialist, in good faith administers prescription medication to a student pursuant to written permission and instructions of the student's parents or guardian.

A person may not maintain an action for injury, death or loss that results from acts or omissions of a school administrator, teacher or other school employee during the administration of a short-acting opioid antagonist unless it is alleged and proved by the complaining party that the school administrator, teacher or other school employee was grossly negligent in administering the short-acting opioid antagonist unless other conditions exist and which are outlined in Oregon law in ORS 339.870.

The civil and criminal immunities provided for above do not apply to an act or omission accounting to gross negligence or willful and wanton misconduct.

Non-Liability Provisions for Self-Administration and Autoinjectable Epinephrine

A school administrator, school nurse, teacher or other school employee designated by the school administrator is not liable in a criminal action or for civil damages as a result of a student's self-administration of medication, as described in ORS 339.866, if the school administrator, school nurse, teacher or other school employee, in compliance with the instructions of the student's Oregon licensed health care professional, in good faith assists the student's self-administration of the medication, if the medication is available to the student pursuant to written permission and instructions of the student's parent, guardian or Oregon licensed health care professional.

A school administrator, school nurse, teacher or other school employee designated by the school administrator is not liable in a criminal action or for civil damages as a result of the use of medication if the school administrator, school nurse, teacher or other school employee in good faith administers autoinjectable epinephrine to a student or other individual with a severe allergy who is unable to self-

administer the medication regardless of whether the student or individual has a prescription for epinephrine.

The district and the members of a district Board are not liable in a criminal action or for civil damages as a result of the use of medication if any person in good faith administers auto injectable epinephrine to a student or other individual with a severe allergy who is unable to self-administer the medication, regardless of whether the student or individual has a prescription for epinephrine; and the person administered the auto injectable epinephrine on school premises, including at a school, on school property under the jurisdiction of the district or at an activity under the jurisdiction of the district.

The civil and criminal immunities described above (which are identified in ORS 339.871) do not apply to an act or omission to gross negligence or willful and wanton misconduct.†

OSBA Model Sample Policy

Code: JHCD
Adopted:

Medications**/*

{Required policy. The requirement for policy comes from ORS 339.866 (2).}

The district recognizes administering a medication to a student and/or permitting a student to administer a medication to themselves, may be necessary to allow the student to attend school. Therefore, the district allows medication, including injectable medications, to be administered to a student by designated personnel and the administration of medication by a student to themselves without assistance from designated personnel, subject to criteria established by the district and in accordance with Oregon law.

The district shall designate personnel authorized to administer medications to students. Medications, including injectable medications, may be administered by designated district personnel as part of a formal delegation by a registered nurse. Annual training shall be provided to designated personnel in accordance with law. The training will align with the ODE Medication Administration Training and include discussion of this policy, procedures and materials, including but not limited to, procedures outlined in administrative regulation JHCD-AR - Medications.

When a licensed health care professional is not immediately available, trained personnel designated by the district may administer epinephrine, glucagon, treatment for adrenal insufficiency, or another medication to a student as prescribed and/or as otherwise allowed by Oregon law.

[A current first-aid/CPR/AED card is required for designated personnel.](#)

The district reserves the right to reject a request for administration of medication at school, either by district personnel or student self-administration, if the medication is not necessary for the student to remain in school.

The district may revoke permission given to a student to self-administer medication if the student does not responsibly self-administer the medication or abuses the use of the medication, as determined by district personnel.

Medications will be handled, stored, monitored, disposed of and records maintained in accordance with law and established district procedures governing the administration of prescription or nonprescription medications to students, including procedures for the disposal of sharps and glass.

A process shall be established by which, upon parent or guardian written request, a backup medication is kept at a reasonably, secure location in the student's classroom as provided by state law.

A premeasured dose of epinephrine may be administered by trained, designated personnel to any student or other individual on district premises who the person believes in good faith is experiencing a severe allergic reaction, regardless of whether the student or individual has a prescription for epinephrine.

[¹] A non-injectable short-acting opioid antagonist may be administered to any student or other individual by district personnel (whether or not they have received training on administering medications) on district premises who the individual administering the short-acting opioid antagonist believes in good faith is experiencing an opioid overdose.

A school administrator, teacher or other school employee, may administer a short-acting opioid antagonist to a student who experienced or is experiencing an opioid overdose without written permission and instructions of the student's parents or guardian.]

This policy shall not prohibit, in any way, the administration of recognized first aid to a student by district employees in accordance with established state law, Board policy and administrative regulation.

The superintendent shall develop administrative regulations to meet the requirements of law and the implementation of this policy.

END OF POLICY

Legal Reference(s):

[ORS 332.107](#)
[ORS 339.866 - 339.871](#)
[ORS 433.800 - 433.830](#)
[ORS 689.800](#)
[OAR 166-400-0010\(17\)](#)
[OAR 166-400-0060\(29\)](#)
[OAR 333-055-0000 - 0035](#)
[OAR 581-021-0037](#)
[OAR 581-022-2220](#)
[OAR 851-047-0000 - 0030](#)

¹ {The district is not required to provide or administer this medication. If the district is going to provide for, and administer this medication, this policy language is required. If the district does not intend to provide or administer this medication, there is no requirement to include this language in this policy.}

Family Educational Rights and Privacy Act of 1974, 20 U.S.C. § 1232g (2018); Family Educational Rights and Privacy, 34 C.F.R. Part 99 (2019).
OREGON HEALTH AUTHORITY AND OREGON DEPARTMENT OF EDUCATION, *Medication Administration: A Manual for School Personnel*.
House Bill 1552 (2024).

Questions to be addressed during work session

Policy JHCD & JHCD AR Medications

Presenting red-line version of JHCD. Open to recommendations for review at worksession.

ASHLAND PUBLIC SCHOOLS ENROLLMENT SUMMARY

April 2025 Full Time

SITE	K	1	2	3	4	5	6	7	8	9	10	11	12		
BELLVIEW	49	35	40	47	36	41								248	BELLVIEW
HELMAN	33	42	46	44	57	42								264	HELMAN
WALKER	36	40	39	38	42	47								242	WALKER
TRAILS	13	13	14	17	16	17	17	14	18					139	TRAILS
*Ashland CONNECT	0	1	0	3	4	4	4	3	6					25	CONNECT
AMS							165	162	189					516	AMS
AHS										222	195	210	196	823	AHS
WILLOW	19	20	22	21	23	22	25	24	19					195	WILLOW
Level 2 Program	0	0	0	0	1	1	0	1	0	1	1	0	0	5	L2P
ASD TOTALS	150	151	161	170	179	174	211	204	232	223	196	210	196	2457	TOTAL

	April Enrollment History															
	2010	2011	2012	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025		
BELLVIEW				315	322	325	315	318	263	256	246	258	254	248	BELLVIEW	
HELMAN				303	314	351	345	345	286	286	281	315	302	264	HELMAN	
WALKER				299	342	343	337	344	275	277	226	221	241	242	WALKER	
TRAILS				100	120	122	123	122	105	107	180	135	139	139	TRAILS	
AMS				579	562	565	564	517	485	480	461	527	529	516	AMS	
AHS				971	996	971	950	940	942	914	934	888	822	823	AHS	
WILLOW				195	192	179	178	180	159	150	150	163	179	195	WILLOW	
Ashland Connect				0	0	0	0	0	0	0	0	24	24	25	CONNECT	
Level 2 Program														5	L2P	
ASD TOTALS				2762	2848	2856	2812	2766	2515	2470	2478	2531	2490	2457	ASD TOTALS	

	Monthly Enrollment									
	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
2024-2025	2512	2507	2479	2468	2470	2472	2469	2457		
2023-2024	2571	2553	2539	2532	2529	2541	2518	2505	2495	2490
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	2814	2796	2793	2779	2812

NOTES:

1. The Level 2 Program is the new District K-12 Site based at Lincoln
2. Willow Wind has an additional 31 part-time homeschooled students we report semi-annually

Ashland School District
Board Personnel Report
April 1, 2025

SITE	NAME	POSITION	STATUS	STATUS CHANGE	SALARY PLACEMENT EXCEPTION
AHS	Donna LaVonne Self Jones	Secretary II	Resignation	NO	NONE
AHS	Matt Preston	Head Coach, Golf Girls	Temporary Service	NO	NONE
AHS	Logan Genaw	Assistant Coach, Golf Boys	Temporary Service	NO	NONE
Bellview	Lauren McGowne	Teacher, Kindergarten	LOA (Feb 2025- June 8 2026)	NO	NONE
Student Services	Sara Watson	Student services Program Assistant	1.0 FTE	NO	NONE
Helman	Samuel Isselhardt	EA - Sitebased	0.875 FTE	NO	NONE
Maintenance	Jon Erskine	Maintenance Worker II	Resignation	NO	NONE
Maintenance	Jon Erskine	Maintenance Worker III	1.0 FTE	NO	NONE
Maintenance	Skyler Prickett	Custodian	1.0 FTE	NO	NONE
Maintenance	Ian Ichord	Maintenance Worker I	1.0 FTE	NO	NONE
Maintenance	Thomas Bell	Custodian	Resignation	NO	NONE
District Office	Charity Armas-stiles	Bus Driver	1.0 FTE	NO	NONE
TRAILS	Jarrett Davidson	Teacher, Art	0.065 FTE	NO	NONE
Willow Wind	Erika Lowe	Instructor	Temporary Service	NO	NONE

MEMORANDUM OF AGREEMENT
BETWEEN
SOUTHERN OREGON BARGAINING COUNCIL/ASHLAND EDUCATION
ASSOCIATION
AND
ASHLAND SCHOOL DISTRICT NO. 5

This memorandum is entered into on March 18, 2025, between the Southern Oregon Bargaining Council/Ashland Education Association and the Ashland School District.

Article 25, Section D of the collective bargaining agreement states, “Newly hired members shall receive full credit on the salary schedule for all prior teaching experience and/or experience in their field (except for Career and Technical Education members without teaching experience) in which they were hired.”

The District and Association agree to amend this language as follows:

Newly hired members shall receive full credit on the salary schedule for all prior teaching experience and/or experience in their field (except for Career and Technical Education members without teaching experience) of .50 FTE or more in which they were hired.

In addition, the District and Association agree that “newly hired” does not include members who do not have a break in service from the District from one school year to the next. These members are considered “rehires” as they maintain their seniority lots and their first three years of employment with the District are counted toward their three-year probationary period. “Newly hired” members are those who have new seniority lots drawn and restart their probationary period upon hire.

Southern Oregon Bargaining Council

Date

Ashland Education Association

Date

Ashland School District Superintendent

Date

Ashland School Board

Date

HIGH SCHOOL SUCCESS (HSS) AGREEMENT
ASHLAND SCHOOL DISTRICT and PINEHURST SCHOOL DISTRICT 2025-27

THIS AGREEMENT is made as of this 17th day of March 2025. by and between Jackson County School District No. 5, Jackson County, Oregon, hereinafter referred to as "ASD", and Pinehurst School District No. 94, Jackson County, Oregon, hereinafter referred to as "PSD."

WHEREAS, ASD and PSD both maintain schools according to the standards prescribed by the State Board of Education; and

WHEREAS, PSD does not maintain a high school for instructing grades 9 through 12 and ASD does maintain a high school for instructing grades 9 through 12, and

WHEREAS, ASD and PSD need to have an agreement in place governing the receipt of grant funding from the Oregon Department of Education for the HSS grant payments to PSD.

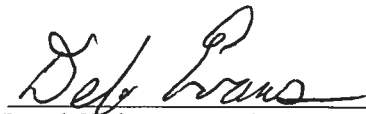
NOW, THEREFORE, for consideration the receipt and adequacy of which are hereby acknowledged by the parties, ASD and PSD hereby agree as follows:

1. Term: The term of this Agreement shall be from July 1, 2025 through June 30, 2026. This Agreement may be renewed upon the written agreement of both PSD and ASD.
2. Administrative: PSD is responsible for reporting the use of the HSS funds to ODE, which will be updated annually by ASD prior to the close of the reporting period. PSD will request the HSS funds from ODE. Within 30 days of receipt, PSD will pay ASD the gross amount received, less the indirect rate of 4%, which will be retained by PSD.
3. Miscellaneous: This Agreement is the entire agreement between the parties and may not be amended or supplemented except in writing executed by both PSD and ASD.

SIGNED in, duplicate as of the dates set forth below.

Pinehurst School District No. 94

Jackson County School District No. 5



Board Chairperson- Deb Evans
Date March 17, 2025

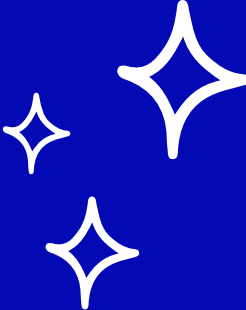
ASD Superintendent- Joseph Hattrick
Date



District Administrator- Emily Cozza
Date March 17, 2025



WALKER ELEMENTARY SCHOOL



2024-2025

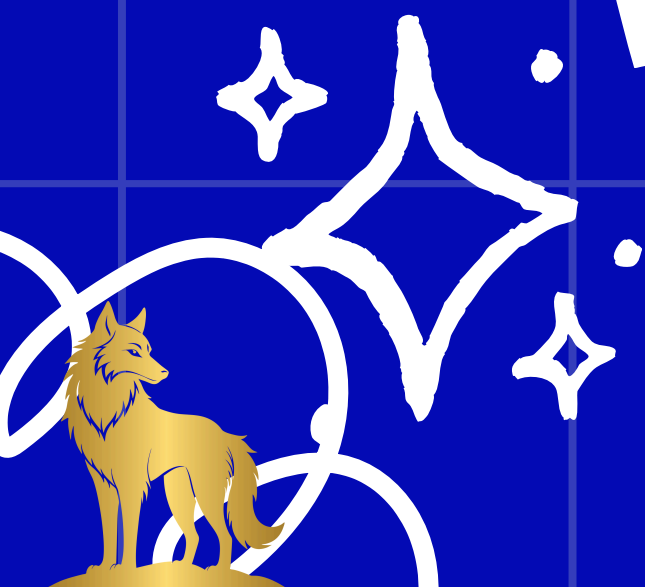
**BUILDING OUR
SCHOOL COMMUNITY**



HELLO!

J'ME STROWBRIDGE
PRINCIPAL

BROOKE JOHNSON THYGESON
SCHOOL COUNSELOR



WALKER ELEMENTARY SCHOOL

CELEBRATING OUR ACHIEVEMENTS

Mission Statement:

The Walker Community values diversity, empathy, and perseverance. We honor the entire learning process from mistakes to academic mastery. We teach our students to advocate for themselves and others. We nurture kindness, creativity, and wonder.

WOLF PACK LEADERS

5th Graders

Karina, Lincoln, Siri, & Mira

4th Graders

Josephine, Lucy, Opal, & Acacia

WOLF PACK LEADERS



Role

Wolf Pack Leaders have helped lead Winter and Spring Expectation Station and have created new rules for courtyard games.

Impact

These leaders play a crucial role in maintaining a positive and organized school environment.

BLUE TICKETS

A New Approach

Transition

We shifted from a Blue Ticket Store to community- driven experiences

Classroom Rewards

Shoes off, extra recess, drop everything and draw, lunch with teachers, etc.

Community Building

Classes can use Blue Tickets to buy experiences for other classes: fostering a sense of community

Focus

Emphasis on experiences and community building rather than material rewards.

HOW DO YOU EARN A BLUE TICKET ?

Safe

When you're on the playground, make sure to use the equipment properly. Don't push or shove, and always take turns. When you can't agree use STOP, WALK, and TALK.

Respectful

Treat classmates, teachers, and staff with kindness and consideration. Listen when others are speaking, use polite language, and respect different opinions and backgrounds.

Responsible

Take ownership of actions and decisions. Admit mistakes, learn from them, and strive to improve. Do the right thing even when no one is watching.



SCHOOL-WIDE REWARDS

RED CARPET DAY

Achievement

Students collectively raised 1,234 Blue Tickets to earn the **RED CARPET DAY** for ALL students

Grand Entrance

On the BIG day, students were greeted by staff in fancy clothes and “paparazzi” to capture their red carpet looks while they made their grand entrances.

Activities

Students enjoyed a short film festival while snacking on popcorn, fruit snacks, and a juice box

Highest attendance day of the⁸³ YEAR!





FLASH DANCE PARTIES



Random morning dance parties
with student selected music.

This encourages overall student
attendance while boosting
positive morning energy.

reduced tardies by ~10%



STUDENT OF THE MONTH



Selection

Each class selects 3 students
(2 who constantly show expectation and 1 who has shown major growth)



Recognition

Students are recognized for being Safe, Respectful and Responsible.



Rewards

- Jump to the front of the line for lunch and recess for the whole month
- Pizza and ice cream party
- Certificate

Outcome

Decreased behavior incidences and
increased positive school culture



WALKER'S GOT TALENT

First Annual

Talent Show Fundraiser held in March
Raised \$1,000!



STUDENT AFFINITY UNIONS



Black Student Union
Asian Pacific Islander Union
Latino Student Union
Native American Student Union



Monthly meeting to enrich and share lived cultural experiences.



Each union created a school-wide assembly to share and honor their cultural heritage while expanding the learning for all students.





WINTER MAKERS' MARKET

With the generous support and guidance of community volunteers from the Walker PTO, students learned to craft beautiful macrame art, felted soap, and custom picture frames.

Each creation was lovingly wrapped and ready to be delivered to someone special.

The event was a wonderful blend of creativity and community spirit, as volunteers shared their skills and funded all the activities.

Students not only learned new crafting techniques, but also experienced the joy of giving.

It was a heartwarming day filled with fun, learning, and the spirit of generosity. 🎨🧼📸



LOOKING AHEAD

DAVINCI NIGHT SPRING SING FUN DAY!



**STRONG COMMUNITY CONNECTIONS
ARE THE  OF OUR THRIVING SCHOOL CULTURE**

THANK YOU





Exterior work at the Humanities Building was finalized including conclusion of the security system installation.



ASHLAND SCHOOL DISTRICT CAPITAL BOND PROGRAM

END OF MONTH REPORT – MARCH 2025



GENERAL PROGRAM UPDATE

Spring break for staff and students meant the opposite for contractors working on the Ashland School District projects. Full advantage was taken of the unlimited access to the Ashland High School campus in regards to both the Modernization Project and the Science Building Seismic Retrofit.

Closeout of the Modernization Project is progressing with final commissioning and system training being the most critical pieces left to complete.

The Science Building Seismic Retrofit is well underway with contractors focusing heavily on first floor exterior demolition and preparation for foundation construction.

Selective demolition of the quad is also advancing in anticipation of a total renovation to be accomplished simultaneous to the Science Building Seismic Retrofit this summer.

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 March, we requested 5 additional purchase orders and processed 11 invoices.

Contract Type	Number of Contracts	Value
Professional Service Agreements / Design Contracts	2	\$ 22,751,464
Construction Contracts	3	\$ 107,711,990



LOCAL VENDORS AND CONTRACTORS

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

ASHLAND AREA VENDORS and CONTRACTORS

Arkitek:design&architecture	Adroit Construction Co.
Ciota Engineering	DOBRIN
Covey Pardee Landscape Architecture	Infinity Electric
Douglas Engineering Pacific	Van Row Mechanical
HMK Company	Cascade Communications
KenCairn Landscape Architecture	Quality Fence
Bean Electric	Pacific 3D Reality Capture
Renfro	Welburn Electric
Pariani Land Surveying	Britannia
Powell Engineering	Patriot Landscaping
ZCS Engineering & Architecture	Sandeem Masonry
Beflor	Alco
Top Notch	Quality Fence
Sandeem Masonry	S&S Sheetmetal
Metal Masters	Urban Racks
Moore Construction	Curtis Huntley
Devry	Cut N' Break
Precision Electric	Advanced Air
Hall of Fame Movers	New Horizons Woodworks
Milestone Landscape Group	Viking Concrete Cutting
Figueroa's Lanscaping & Construction	Artoff Construction
North Core Excavation	LLAD
Southern Oregon Painting Company	True South Solar
Pressure Point Roofing	

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	100%	
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 windows, 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





Ashland Middle School





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	100%	
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
Mike.freeman@hmkco.org
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 existing spaces for science program requirements.
- Upgrades for air quality, security, restrooms, and technology infrastructure.
- Seismic rehabilitation at both Humanities and Science buildings

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	100%	
Permits, Bid and Award	05/31/23	3/29/24	100%	
Construction	06/16/23	12/31/24	97%	
Substantial Completion	12/31/24	12/31/24	88%	
Post Occupancy Evaluation	TBD	TBD	0%	
Warranty Period	01/01/25	01/01/26	0%	TBD
Other				

CURRENT ACTIVITIES

Spring break offered a fundamental window of uninterrupted access to the campus. The timing was opportune for allowing contractors to finalize nearly all remaining scopes of work, complete the majority of outstanding punch items and gain considerable progress on the commissioning of both Science and Humanities Buildings. There are only isolated tasks remaining which are in areas where the work should go unnoticed by staff and students even during off hours.

The fire alarm upgrade is complete and functional with fire marshal inspection completed on March 28th!

Board approval of the final project budget for the Science Seismic Retrofit Project has allowed for finalized contracting with the general contractor and, subsequently, their subcontractors. The window of access during spring break allowed the seismic upgrade at the Science Building to advance expeditiously. Demolition of exterior soffits, perimeter footing excavation and concrete demolition at the quad are all critical pieces of early work that will support project completion by the start of school in Fall of 2025. The opportunity to access campus for this early work is vital to ensure sufficient time to



address delicate issues such as protection of the redwood tree and its root structure as work progresses in the courtyard.

ACTIVITIES SCHEDULED FOR NEXT PERIOD

- Confirmation of performance through low voltage systems in Science and Humanities
- Completion of punch list items
- Commissioning of new electrical and mechanical systems
- Form and pour concrete footings at perimeter of Science Building
- Continued demolition and preparation of quad renovation

ADDITIONAL INFORMATION

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

Josh Whitaker, Project Manager

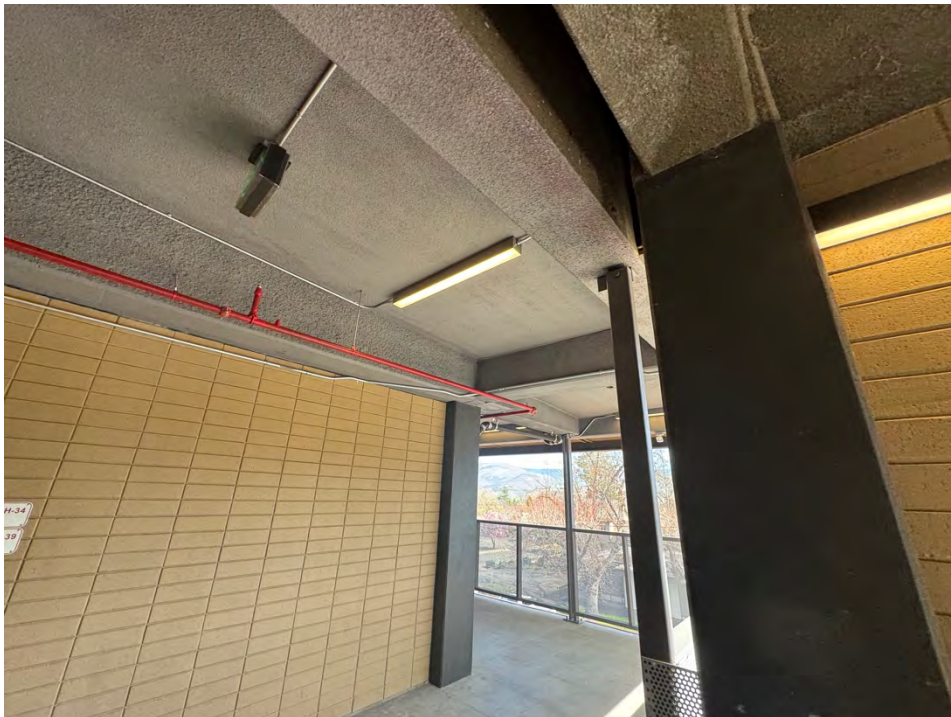
josh.whitaker@hmkco.org

541.601.3638



PROJECT PHOTO GALLERY

Completion of exterior paint at the Humanities Building





Evaluation and implementation of tree protection in the courtyard





Selective demolition of the Science Building





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	100%	Complete
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 state-of-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
FEBRUARY 28, 2025**

Project Expense	Original Budget	Paid to Date	Remaining Balance	Revised Budget
Hard Cost				
Technology	\$ 3,420,000	\$ 3,912,749	\$ (513,525)	\$ 3,399,224
Restrooms	\$ 3,087,500	\$ -	\$ -	\$ -
Security	\$ 2,850,000	\$ 294,631	\$ 12,311	\$ 306,942
HVAC & MEP	\$ 13,569,000	\$ -	\$ -	\$ -
Transportation	\$ -	\$ 559,844	\$ 1	\$ 559,845
Bellview	\$ -	\$ 1,590,709	\$ 106,573	\$ 1,697,282
Maintenance	\$ -	\$ 676,982	\$ -	\$ 676,982
District Office	\$ -	\$ -	\$ -	\$ -
Asbestos Abatement	\$ 316,447	\$ -	\$ -	\$ -
Construction Contingency	\$ 1,348,640	\$ -	\$ 300,769	\$ 300,769
Construction Sub Total	\$ 24,591,587	\$ 7,034,915	\$ (93,871)	\$ 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	\$ 116,985	\$ 165,073	\$ 282,058
A & E Reimbursable Expenses	\$ 41,670	\$ -	\$ 10,000	\$ 10,000
Commissioning	\$ 145,267	\$ 183,995	\$ (15,995)	\$ 168,000
Printing & Plan Distribution	\$ 9,416	\$ -	\$ -	\$ -
Hazardous Materials Consultant	\$ 138,808	\$ 20,890	\$ 460	\$ 21,350
Construction Testing	\$ -	\$ -	\$ -	\$ -
Constructability Review	\$ 72,634	\$ -	\$ -	\$ -
Plan Review & Building Permits	\$ 250,971	\$ 60,724	\$ 46,754	\$ 107,478
Special Inspection and Testing	\$ 50,053	\$ -	\$ 21,000	\$ 21,000
Miscellaneous Fees	\$ -	\$ 43,513	\$ (11,213)	\$ 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	\$ -	\$ 40,623	\$ 377	\$ 41,000
Technology (Design)	\$ 210,634	\$ 1,847	\$ 26,830	\$ 28,677
Acoustics	\$ 36,317	\$ -	\$ -	\$ -
Criminal Background Checks	\$ 3,162	\$ -	\$ -	\$ -
System Development Charges	\$ -	\$ -	\$ -	\$ -
Value Engineering	\$ 72,634	\$ -	\$ -	\$ -
Utility Connection Fee	\$ 116,214	\$ -	\$ -	\$ -
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	\$ 479,696	\$ 406,365	\$ 886,060
Total Project Cost	\$ 33,467,752	\$ 7,514,611	\$ 312,493	\$ 7,827,104

* Budget has been moved to the Project Level

**Budget has been moved to the Program Level



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
PROGRAM LEVEL BUDGET
FEBRUARY 28, 2025**

Program Revenue ¹	Original Budget	Received to Date	Allocated 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	\$ 20,743,997	\$ 1,692,692	\$ 22,436,690
OSCM 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	\$ -	\$ 1,834,325
Seismic (Ashland High School)	\$ -	\$ 2,011,704	\$ 2,500,000	\$ -	\$ 2,500,000
Seismic (Ashland High School Science)	\$ -	\$ -	\$ 2,500,000	\$ -	\$ 2,500,000
Investment Interest	\$ 5,000,000	\$ 5,864,180	\$ 4,628,566	\$ 1,235,614	\$ 5,864,180
Miscellaneous	\$ -	\$ 292,968	\$ -	\$ 292,968	\$ 292,968
Total Revenue	\$ 138,349,617	\$ 146,317,313	\$ 146,084,335	\$ 3,221,274	\$ 149,305,609

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
FEBRUARY 28, 2025**

	Original Budget	Paid to Date	Remaining Balance	Revised Budget
Program Expense				
District Wide Programs	\$ 24,591,587	\$ 7,034,915	\$ (93,871)	\$ 6,941,044
District Wide Solar Projects	\$ -	\$ 931,886	\$ 718,912	\$ 1,650,798
Helman Elementary	\$ 11,294,084	\$ 15,367,756	\$ (232,685)	\$ 15,135,071
Walker Elementary	\$ 11,252,185	\$ 30,130,377	\$ 87,160	\$ 30,217,537
Ashland Middle School	\$ 21,960,270	\$ 35,813,522	\$ (366,146)	\$ 35,447,376
Ashland High School	\$ 9,124,089	\$ 20,765,249	\$ 6,851,840	\$ 27,617,089
Willow Wind Learning Center	\$ -	\$ 1,732,696	\$ 1,732	\$ 1,734,428
Construction Sub Total	\$ 78,222,215	\$ 111,776,400	\$ 6,966,942	\$ 118,743,343
Soft Cost				
Administrative Cost				
Legal Fees	\$ 100,000	\$ 28,044	\$ (4,630)	\$ 23,414
Bond Counsel	\$ -	\$ -	\$ -	\$ -
Bond Issuance Cost	\$ 625,293	\$ 625,293	\$ -	\$ 625,293
Builders Risk Insurance	\$ -	\$ 80,126	\$ (7,926)	\$ 72,200
Project Management	\$ 2,274,483	\$ 4,637,321	\$ (628,457)	\$ 4,008,864
Reimbursable Expenses	\$ 151,631	\$ 328,755	\$ (1,788)	\$ 326,967
Communications	\$ -	\$ 199,367	\$ (6,095)	\$ 193,272
Sustainability	\$ -	\$ -	\$ -	\$ -
Miscellaneous Fees (Bank, consulting)	\$ -	\$ 415,083	\$ (109,434)	\$ 305,649
Ashland SD Staff	\$ -	\$ 1,322,706	\$ (465,070)	\$ 857,636
Lincoln Elementary	\$ -	\$ 42,354	\$ 446	\$ 42,800
District Wide Roofing Project	\$ -	\$ 46,200	\$ -	\$ 46,200
Site Cost				
Site Survey	\$ 213,903	\$ 147,534	\$ 10,189	\$ 157,723
Geo-Tech Report	\$ 123,179	\$ 109,323	\$ 15,411	\$ 124,734
Planning Cost				
Design Fees	\$ 7,414,694	\$ 8,503,221	\$ (323,420)	\$ 8,179,800
A & E Reimbursable Expenses	\$ 144,431	\$ 35,420	\$ 81,103	\$ 116,523
Commissioning	\$ 334,589	\$ 393,279	\$ (32,970)	\$ 360,309
Printing & Plan Distribution	\$ 31,288	\$ 1,724	\$ 55	\$ 1,779
Hazardous Materials Consultant	\$ 418,761	\$ 543,590	\$ (67,734)	\$ 475,856
Construction Testing	\$ -	\$ -	\$ -	\$ -
Constructability Review	\$ 285,616	\$ 573,003	\$ 470	\$ 573,473
Plan Review & Building Permits	\$ 764,778	\$ 3,286,796	\$ 230,418	\$ 3,517,213
Special Inspection and Testing	\$ 391,469	\$ 795,788	\$ (255,083)	\$ 540,705
Miscellaneous Fees	\$ 205,522	\$ 1,056,938	\$ (214,734)	\$ 842,204
Ed Specs	\$ 73,532	\$ -	\$ -	\$ -
Kitchen	\$ 32,940	\$ -	\$ -	\$ -
Miscellaneous				
Legal Advertisements	\$ 12,823	\$ 1,457	\$ 5,450	\$ 6,907
Furniture, Fixtures, and Equipment (FF&E)	\$ 2,569,031	\$ 2,666,350	\$ 72,489	\$ 2,738,839
Technology	\$ 404,005	\$ 466,937	\$ 20,763	\$ 487,700
Technology (Design)	\$ 467,536	\$ 7,252	\$ 63,223	\$ 70,475
Acoustics	\$ 113,387	\$ -	\$ -	\$ -
Criminal Background Checks	\$ 9,862	\$ 12,213	\$ (130)	\$ 12,083
System Development Charges	\$ 332,544	\$ 19,692	\$ (600)	\$ 19,092
Value Engineering	\$ 194,985	\$ -	\$ -	\$ -
Utility Connection Fee	\$ 116,214	\$ -	\$ -	\$ -
Unallocated Owner Contingency	\$ 9,104,657	\$ -	\$ 38,849	\$ 38,849
Inflation	\$ 6,111,120	\$ -	\$ 74,433	\$ 74,433
Sub Total Soft Cost	\$ 33,022,273	\$ 26,345,766	\$ (1,504,773)	\$ 24,840,992
Total Project Cost	\$ 111,244,488	\$ 138,122,166	\$ 5,462,169	\$ 143,584,335



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
PROGRAM LEVEL BUDGET
FEBRUARY 28, 2025**

		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Program Expense					
Soft Cost					
Legal Fees		\$ -	\$ 26,896	\$ (3,482)	\$ 23,414
Bond Counsel		\$ -	\$ -	\$ -	\$ -
Bond Issuance Cost		\$ 625,293	\$ 625,293	\$ -	\$ 625,293
Builders Risk Insurance		\$ -	\$ -	\$ -	\$ -
Project Management	12	\$ -	\$ 4,275,868	\$ (307,004)	\$ 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	\$ -	\$ 12,213	\$ (130)	\$ 12,083
Printing & Plan Distribution	10	\$ -	\$ 779	\$ -	\$ 779
Miscellaneous Fees (Bank, consulting)	11	\$ -	\$ 415,083	\$ (109,434)	\$ 305,649
Ashland SD Staff	11,12	\$ -	\$ 1,322,706	\$ (465,070)	\$ 857,636
Lincoln Elementary		\$ -	\$ 42,354	\$ 446	\$ 42,800
District Wide Roofing Project		\$ -	\$ 46,200	\$ -	\$ 46,200
Sub Total Soft Cost		\$ 625,293	\$ 7,277,969	\$ (890,412)	\$ 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
FEBRUARY 28, 2025**

		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Project Expense					
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		\$ -	\$ -	\$ -	\$ -
Printing & Plan Distribution		\$ 2,316	\$ -	\$ -	\$ -
Hazardous Materials Consultant	2	\$ 66,174	\$ -	\$ -	\$ -
Construction Testing		\$ -	\$ -	\$ -	\$ -
Constructability Review		\$ -	\$ -	\$ -	\$ -
Plan Review & Building Permits	2	\$ 39,704	\$ -	\$ -	\$ -
Special Inspection and Testing		\$ -	\$ -	\$ -	\$ -
Miscellaneous Fees		\$ -	\$ -	\$ -	\$ -
Ed Specs		\$ -	\$ -	\$ -	\$ -
Kitchen		\$ -	\$ -	\$ -	\$ -
Miscellaneous					
Legal Advertisements	2	\$ 1,323	\$ -	\$ -	\$ -
Furniture, Fixtures, and Equipment (FF&E)		\$ -	\$ -	\$ -	\$ -
Technology		\$ -	\$ -	\$ -	\$ -
Technology (Design)		\$ -	\$ -	\$ -	\$ -
Acoustics		\$ -	\$ -	\$ -	\$ -
Criminal Background Checks		\$ 662	\$ -	\$ -	\$ -
System Development Charges		\$ -	\$ -	\$ -	\$ -
Value Engineering		\$ -	\$ -	\$ -	\$ -
Utility Connection Fee		\$ -	\$ -	\$ -	\$ -
Unallocated Owner Contingency	2	\$ 413,588	\$ -	\$ -	\$ -
Inflation		\$ 258,837	\$ -	\$ -	\$ -
Sub Total Soft Cost		\$ 1,264,057	\$ -	\$ -	\$ -
Total Project Cost		\$ 4,572,762	\$ -	\$ -	\$ -

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
FEBRUARY 28, 2025**

Project Expense		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Hard Cost					
Maximum Allowable Construction Cost (MACC)	10	\$ 2,850,000	\$ 294,631	\$ 12,311	\$ 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	\$ 294,631	\$ 149,518	\$ 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		\$ -	\$ -	\$ -	\$ -
Printing & Plan Distribution		\$ 2,100	\$ -	\$ -	\$ -
Hazardous Materials Consultant		\$ -	\$ -	\$ -	\$ -
Construction Testing		\$ -	\$ -	\$ -	\$ -
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		\$ -	\$ -	\$ -	\$ -
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	7,8,9,10	\$ 228,396	\$ -	\$ 74,433	\$ 74,433
Sub Total Soft Cost		\$ 1,034,996	\$ -	\$ 352,785	\$ 352,785
Total Project Cost		\$ 4,034,996	\$ 294,631	\$ 502,303	\$ 796,934

1. Reallocated \$350,000 to new projects (transportation, bellview, maintenance, and district office)
2. Reallocated \$2,000,000 to AHS (09.30.21)
3. Reallocated Bond Issuance Costs back to Program Level (06.30.22)
4. Reallocated \$50k from Security to Transportation and \$40k to AMS (06.30.22)
5. Reallocated \$24k from Security to Maintenance (08.31.22)
6. Reallocated \$89k from Security to BES for Sentinel (03.31.23)
7. Reallocated \$26k from Security to AMS for Ednetics (03.31.23)
8. Reallocated \$24k from Security to Maintenance for Ednetics (03.31.23)
9. Reallocated \$17k from Security to Transportation for Ednetics(03.31.23)
10. Reallocated \$360k from Security to Program Level (04.30.23)



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
DW HVAC & MEP BUDGET
FEBRUARY 28, 2025**

		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Project Expense					
Hard Cost					
Maximum Allowable Construction Cost (MACC)	3	\$ 13,569,000	\$ -	\$ -	\$ -
Asbestos		\$ 257,742	\$ -	\$ -	\$ -
Seismic Retro Upgrade			\$ -	\$ -	\$ -
1.5% Solar (Total Project Major Building)			\$ -	\$ -	\$ -
Construction Contingency	3	\$ 856,140	\$ -	\$ -	\$ -
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		\$ -	\$ -	\$ -	\$ -
Sustainability		\$ -	\$ -	\$ -	\$ -
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		\$ 5,000	\$ -	\$ -	\$ -
Hazardous Materials Consultant	3	\$ 72,634	\$ -	\$ -	\$ -
Construction Testing		\$ -	\$ -	\$ -	\$ -
Constructability Review	3	\$ 72,634	\$ -	\$ -	\$ -
Plan Review & Building Permits	3	\$ 145,267	\$ -	\$ -	\$ -
Special Inspection and Testing	3	\$ 29,053	\$ -	\$ -	\$ -
Miscellaneous Fees		\$ -	\$ -	\$ -	\$ -
Ed Specs		\$ -	\$ -	\$ -	\$ -
Kitchen		\$ -	\$ -	\$ -	\$ -
Miscellaneous					
Legal Advertisements		\$ 1,500	\$ -	\$ -	\$ -
Furniture, Fixtures, and Equipment (FF&E)		\$ -	\$ -	\$ -	\$ -
Technology		\$ -	\$ -	\$ -	\$ -
Technology (Design)		\$ 72,634	\$ -	\$ -	\$ -
Acoustics	3	\$ 36,317	\$ -	\$ -	\$ -
Criminal Background Checks		\$ 1,000	\$ -	\$ -	\$ -
System Development Charges		\$ -	\$ -	\$ -	\$ -
Value Engineering	3	\$ 72,634	\$ -	\$ -	\$ -
Utility Connection Fee	3	\$ 116,214	\$ -	\$ -	\$ -
Unallocated Owner Contingency	4	\$ 1,815,843	\$ -	\$ -	\$ -
Inflation	4	\$ 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 \$475,000 to AHS -Phase II (07.01.21)
3. Reallocated \$972,316 to AHS -Phase II (07.01.21)
4. Reallocated \$486,606 to WES (02.28.22)
5. Reallocated Bond Issuance Costs back to Program Level (06.30.22)



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
DW TECHNOLOGY BUDGET
FEBRUARY 28, 2025**

		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Project Expense					
Hard Cost					
Maximum Allowable Construction Cost (MACC)	8/9	\$ 3,420,000	\$ 3,912,749	\$ (513,525)	\$ 3,399,224
Asbestos		\$ -	\$ -	\$ -	\$ -
Seismic Retro Upgrade		\$ -	\$ -	\$ -	\$ -
1.5% Solar (Total Project Major Building)		\$ -	\$ -	\$ -	\$ -
Construction Contingency		\$ 180,000	\$ -	\$ -	\$ -
Construction Sub Total		\$ 3,600,000	\$ 3,912,749	\$ (513,525)	\$ 3,399,224
Soft Cost					
Administrative Cost					
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		\$ -	\$ -	\$ -	\$ -
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	\$ 1,847	\$ (170)	\$ 1,677
Acoustics		\$ -	\$ -	\$ -	\$ -
Criminal Background Checks		\$ 1,000	\$ -	\$ -	\$ -
System Development Charges		\$ -	\$ -	\$ -	\$ -
Value Engineering		\$ -	\$ -	\$ -	\$ -
Utility Connection Fee		\$ -	\$ -	\$ -	\$ -
Unallocated Owner Contingency	6	\$ 360,000	\$ -	\$ -	\$ -
Inflation		\$ 253,572	\$ -	\$ -	\$ -
Sub Total Soft Cost		\$ 879,772	\$ 1,847	\$ (170)	\$ 1,677
Total Project Cost		\$ 4,479,772	\$ 3,914,597	\$ (513,696)	\$ 3,400,901

* 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 (06.30.22)

6. Reallocated costs to MACC (06.30.22)

7. Reallocated from Invest Inc (08.31.22)

8. Reallocated 300k from Invest Inc (09.30.22)

9. Reallocated within Budget (09.30.22)



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
TRANSPORTATION BUDGET
FEBRUARY 28, 2025**

		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Project Expense					
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		\$ -	\$ -	\$ -	\$ -
Constructability Review		\$ -	\$ -	\$ -	\$ -
Plan Review & Building Permits		\$ -	\$ 17,903	\$ 7,152	\$ 25,055
Special Inspection and Testing		\$ -	\$ -	\$ -	\$ -
Miscellaneous Fees	8	\$ -	\$ 4,388	\$ 613	\$ 5,000
Ed Specs		\$ -	\$ -	\$ -	\$ -
Kitchen		\$ -	\$ -	\$ -	\$ -
Miscellaneous					
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
Total Project Cost		\$ -	\$ 668,205	\$ 27,465	\$ 695,669

1. Reallocated from DW Security and HVAC (04.18.21)
2. Reallocated within Budget(12.31.21)
3. Reallocated to Maintenance Bldg (02.28.22)
4. 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)
8. Reallocated within Budget (09.30.22)
9. Reallocated from Security (03.31.23)



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
BELLVIEW BUDGET
FEBRUARY 28, 2025**

		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Project Expense					
Hard Cost					
Maximum Allowable Construction Cost (MACC)	6	\$ -	\$ 352,879	\$ 54,763	\$ 407,642
Asbestos		\$ -	\$ -	\$ -	\$ -
Seismic Retro Upgrade		\$ -	\$ -	\$ -	\$ -
1.5% Solar (Total Project Major Building)		\$ -	\$ -	\$ -	\$ -
Phase 2	5,6	\$ -	\$ 1,237,830	\$ 51,810	\$ 1,289,640
Construction Contingency	6	\$ -	\$ -	\$ 144,186	\$ 144,186
Construction Sub Total		\$ -	\$ 1,590,709	\$ 250,759	\$ 1,841,468
Soft Cost					
Administrative Cost					
Legal Fees		\$ -	\$ -	\$ -	\$ -
Bond Counsel		\$ -	\$ -	\$ -	\$ -
Bond Issuance Cost		\$ -	\$ -	\$ -	\$ -
Builders Risk Insurance		\$ -	\$ -	\$ -	\$ -
Project Management		\$ -	\$ -	\$ -	\$ -
Reimbursable Expenses		\$ -	\$ -	\$ -	\$ -
Communications		\$ -	\$ -	\$ -	\$ -
Sustainability		\$ -	\$ -	\$ -	\$ -
Site Cost					
Site Survey	4	\$ -	\$ 2,270	\$ -	\$ 2,270
Geo-Tech Report		\$ -	\$ -	\$ -	\$ -
Planning Cost					
Design Fees	4,7	\$ -	\$ 55,275	\$ (6,582)	\$ 48,693
A & E Reimbursable Expenses		\$ -	\$ -	\$ 5,000	\$ 5,000
Commissioning	4,7	\$ -	\$ 141,992	\$ (18,992)	\$ 123,000
Printing & Plan Distribution	7	\$ -	\$ -	\$ -	\$ -
Hazardous Materials Consultant		\$ -	\$ 4,540	\$ 460	\$ 5,000
Construction Testing		\$ -	\$ -	\$ -	\$ -
Constructability Review		\$ -	\$ -	\$ -	\$ -
Plan Review & Building Permits		\$ -	\$ 8,508	\$ 21,405	\$ 29,913
Special Inspection and Testing		\$ -	\$ -	\$ -	\$ -
Miscellaneous Fees		\$ -	\$ 32,270	\$ (13,270)	\$ 19,000
Ed Specs		\$ -	\$ -	\$ -	\$ -
Kitchen		\$ -	\$ -	\$ -	\$ -
Miscellaneous					
Legal Advertisements		\$ -	\$ 404	\$ 2,096	\$ 2,500
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		\$ -	\$ 245,260	\$ (9,884)	\$ 235,376
Total Project Cost		\$ -	\$ 1,835,969	\$ 240,875	\$ 2,076,844

1. Reallocated from DW Security and HVAC (04.18.21)
2. Reallocate within budget (12.31.21)
3. Reallocate within budget (06.30.22)
4. Reallocate within budget (09.30.22)
5. Reallocate from Premium and DW Security (03.31.23)



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
MAINTENANCE BLDG BUDGET
FEBRUARY 28, 2025**

		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Project Expense					
Hard Cost					
Maximum Allowable Construction Cost (MACC)		\$ -	\$ 653,092	\$ -	\$ 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		\$ -	\$ -	\$ -	\$ -
Miscellaneous Fees	6	\$ -	\$ 6,855	\$ 1,445	\$ 8,300
Ed Specs		\$ -	\$ -	\$ -	\$ -
Kitchen		\$ -	\$ -	\$ -	\$ -
Miscellaneous					
Legal Advertisements		\$ -	\$ 407	\$ 1,593	\$ 2,000
Furniture, Fixtures, and Equipment (FF&E)		\$ -	\$ -	\$ -	\$ -
Technology	8,9	\$ -	\$ 23,801	\$ 199	\$ 24,000
Technology (Design)		\$ -	\$ -	\$ -	\$ -
Acoustics		\$ -	\$ -	\$ -	\$ -
Criminal Background Checks		\$ -	\$ -	\$ -	\$ -
System Development Charges		\$ -	\$ -	\$ -	\$ -
Value Engineering		\$ -	\$ -	\$ -	\$ -
Utility Connection Fee		\$ -	\$ -	\$ -	\$ -
Unallocated Owner Contingency	6	\$ -	\$ -	\$ 26,735	\$ 26,735
Inflation		\$ -	\$ -	\$ -	\$ -
Sub Total Soft Cost		\$ -	\$ 124,227	\$ 37,823	\$ 162,050
Total Project Cost		\$ -	\$ 801,209	\$ 55,547	\$ 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
FEBRUARY 28, 2025**

		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Project Expense					
Hard Cost					
Maximum Allowable Construction Cost (MACC)	13	\$ 10,576,000	\$ 15,367,756	\$ (232,685)	\$ 15,135,071
Asbestos		\$ 189,259		\$ -	\$ -
Seismic Retro Upgrade				\$ -	
1.5% Solar (Total Project Major Building)				\$ -	\$ -
Construction Contingency	13	\$ 528,825	\$ -	\$ -	\$ -
Construction Sub Total		\$ 11,294,084	\$ 15,367,756	\$ (232,685)	\$ 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		\$ -	\$ -	\$ -	\$ -
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	\$ 99,456	\$ 1,978	\$ 101,434
Ed Specs		\$ 22,588	\$ -	\$ -	\$ -
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	\$ -	\$ -	\$ -
Value Engineering		\$ 56,470	\$ -	\$ -	\$ -
Utility Connection Fee		\$ -	\$ -	\$ -	\$ -
Unallocated Owner Contingency		\$ 1,129,408	\$ -	\$ -	\$ -
Inflation		\$ 921,871	\$ -	\$ -	\$ -
Sub Total Soft Cost		\$ 4,992,297	\$ 2,935,673	\$ 60,093	\$ 2,995,766
Total Project Cost		\$ 16,286,381	\$ 18,303,429	\$ (172,592)	\$ 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
WALKER ELEMENTARY SCHOOL BUDGET
FEBRUARY 28, 2025**

		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Project Expense					
Hard Cost					
Maximum Allowable Construction Cost (MACC)	15	\$ 8,533,000	\$ 26,829,423	\$ 197,268	\$ 27,026,691
Asbestos		\$ 42,535	\$ -	\$ -	
Seismic Retro Upgrade		\$ 2,250,000	\$ 1,535,626	\$ 77,795	\$ 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	\$ 30,130,377	\$ 87,160	\$ 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	\$ 55	\$ 1,000
Hazardous Materials Consultant		\$ 90,022	\$ 147,085	\$ 4,537	\$ 151,622
Construction Testing		\$ -	\$ -	\$ -	\$ -
Constructability Review		\$ 45,011	\$ 75,000	\$ -	\$ 75,000
Plan Review & Building Permits		\$ 90,022	\$ 892,242	\$ 4,718	\$ 896,960
Special Inspection and Testing	14	\$ 63,015	\$ 139,809	\$ (26,719)	\$ 113,090
Miscellaneous Fees	16,17	\$ 36,009	\$ 418,679	\$ (132,529)	\$ 286,150
Ed Specs		\$ 18,004	\$ -	\$ -	\$ -
Kitchen		\$ -	\$ -	\$ -	\$ -
Miscellaneous					
Legal Advertisements		\$ 2,000	\$ -	\$ -	\$ -
Furniture, Fixtures, and Equipment (FF&E)	14	\$ 450,109	\$ 868,562	\$ 3,338	\$ 871,900
Technology	14	\$ 90,022	\$ 238,419	\$ 4,202	\$ 242,621
Technology (Design)		\$ 45,011	\$ -	\$ -	\$ -
Acoustics		\$ 13,503	\$ -	\$ -	\$ -
Criminal Background Checks		\$ 1,200	\$ -	\$ -	\$ -
System Development Charges	16	\$ -	\$ -	\$ -	\$ -
Value Engineering		\$ -	\$ -	\$ -	\$ -
Utility Connection Fee		\$ -	\$ -	\$ -	\$ -
Unallocated Owner Contingency		\$ 1,125,273	\$ -	\$ -	\$ -
Inflation		\$ 746,863	\$ -	\$ -	\$ -
Sub Total Soft Cost		\$ 4,442,393	\$ 4,983,854	\$ (168,653)	\$ 4,815,200
Total Project Cost		\$ 15,694,578	\$ 35,114,231	\$ (81,494)	\$ 35,032,737

10. Reallocated Bond Issuance Costs back to Program Level (06.30.22)
11. Reallocated within Budget (06.30.22)
12. Reallocated within Budget (08.31.22)
13. Increase budget with Investment Income (08.31.22)
14. Increase budget with Investment Income (03.31.23)
15. Reallocated within Budget (03.31.23)
16. Costs were recategorized (04.30.23)
17. Reallocated within Budget (04.30.23)



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
ASHLAND MIDDLE SCHOOL BUDGET
FEBRUARY 28, 2025**

		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Project Expense					
Hard Cost					
Maximum Allowable Construction Cost (MACC)	18	\$ 20,500,000	\$ 35,813,522	\$ (366,146)	\$ 35,447,376
Asbestos		\$ 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	\$ 35,813,522	\$ (366,146)	\$ 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	\$ 2,359,606	\$ 83,084	\$ 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	\$ 300,136	\$ (20,886)	\$ 279,250
Ed Specs		\$ 32,940	\$ -	\$ -	\$ -
Kitchen		\$ 32,940	\$ -	\$ -	\$ -
Miscellaneous					
Legal Advertisements		\$ 2,000	\$ -	\$ -	\$ -
Furniture, Fixtures, and Equipment (FF&E)		\$ 1,098,014	\$ 1,154,444	\$ (4,444)	\$ 1,150,000
Technology	16	\$ 109,801	\$ 56,821	\$ 15,964	\$ 72,785
Technology (Design)		\$ 109,801	\$ -	\$ -	\$ -
Acoustics		\$ 32,940	\$ -	\$ -	\$ -
Criminal Background Checks		\$ 2,000	\$ -	\$ -	\$ -
System Development Charges		\$ 219,603	\$ 4,350	\$ (600)	\$ 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	\$ 5,504,880	\$ 118,137	\$ 5,623,017
Total Project Cost		\$ 31,990,635	\$ 41,318,402	\$ (248,009)	\$ 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
WILLOW WIND LEARNING CENTER
FEBRUARY 28, 2025**

Project Expense		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Hard Cost					
Maximum Allowable Construction Cost (MACC)	4,8	\$ -	\$ 1,732,696	\$ 1,732	\$ 1,734,428
Other Contractor Costs		\$ -	\$ -	\$ -	\$ -
		\$ -	\$ -	\$ -	\$ -
		\$ -	\$ -	\$ -	\$ -
Construction Contingency		\$ -	\$ -	\$ -	\$ -
Construction Sub Total		\$ -	\$ 1,732,696	\$ 1,732	\$ 1,734,428
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	5	\$ -	\$ 128,412	\$ (351)	\$ 128,061
A & E Reimbursable Expenses		\$ -	\$ -	\$ -	\$ -
Commissioning		\$ -	\$ 21,500	\$ 284	\$ 21,784
Printing & Plan Distribution		\$ -	\$ -	\$ -	\$ -
Hazardous Materials Consultant		\$ -	\$ 10,894	\$ -	\$ 10,894
Construction Testing		\$ -	\$ -	\$ -	\$ -
Constructability Review		\$ -	\$ -	\$ -	\$ -
Plan Review & Building Permits		\$ -	\$ 37,164	\$ (1,844)	\$ 35,320
Special Inspection and Testing		\$ -	\$ 3,833	\$ 0	\$ 3,833
Miscellaneous Fees	6,7	\$ -	\$ 54,272	\$ 3,994	\$ 58,266
Ed Specs		\$ -	\$ -	\$ -	\$ -
Kitchen		\$ -	\$ -	\$ -	\$ -
Miscellaneous					
Legal Advertisements		\$ -	\$ -	\$ -	\$ -
Furniture, Fixtures, and Equipment (FF&E)		\$ -	\$ 8,535	\$ 465	\$ 9,000
Technology		\$ -	\$ -	\$ -	\$ -
Technology (Design)		\$ -	\$ -	\$ -	\$ -
Acoustics		\$ -	\$ -	\$ -	\$ -
Criminal Background Checks		\$ -	\$ -	\$ -	\$ -
System Development Charges		\$ -	\$ 15,342	\$ -	\$ 15,342
Value Engineering		\$ -	\$ -	\$ -	\$ -
Utility Connection Fee		\$ -	\$ -	\$ -	\$ -
Unallocated Owner Contingency	5	\$ -	\$ -	\$ -	\$ -
Inflation		\$ -	\$ -	\$ -	\$ -
Sub Total Soft Cost		\$ -	\$ 279,952	\$ 2,548	\$ 282,500
Total Project Cost		\$ -	\$ 2,012,648	\$ 4,280	\$ 2,016,928

2. ReAllocated costs within budget (08.01.21)
2. ReAllocated costs within budget (08.01.21)
3. \$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
FEBRUARY 28, 2025**

		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Project Expense					
Hard Cost					
1.5% Solar (Walker Elementary)		\$ -	\$ 280,779	\$ 1,619	\$ 282,398
1.5% Solar (Helman Elementary)		\$ -	\$ 250,000	\$ -	\$ 250,000
1.5% Solar (Ashland Middle School)	2,3,4	\$ -	\$ 401,106	\$ 17,294	\$ 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		\$ -	\$ 931,886	\$ 718,912	\$ 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	\$ -	\$ 13,100	\$ (9,100)	\$ 4,000
Geo-Tech Report		\$ -	\$ -	\$ -	\$ -
Planning Cost					
Design Fees	2,3,4	\$ -	\$ 80,100	\$ (10,500)	\$ 69,600
A & E Reimbursable Expenses		\$ -	\$ -	\$ -	\$ -
Commissioning		\$ -	\$ -	\$ -	\$ -
Printing & Plan Distribution		\$ -	\$ -	\$ -	\$ -
Hazardous Materials Consultant		\$ -	\$ -	\$ -	\$ -
Construction Testing		\$ -	\$ -	\$ -	\$ -
Constructability Review		\$ -	\$ -	\$ -	\$ -
Plan Review & Building Permits	3,4,5	\$ -	\$ 43,827	\$ 14,173	\$ 58,000
Special Inspection and Testing		\$ -	\$ -	\$ -	\$ -
Miscellaneous Fees		\$ -	\$ 1,989	\$ (1,989)	\$ -
Ed Specs		\$ -	\$ -	\$ -	\$ -
Kitchen		\$ -	\$ -	\$ -	\$ -
Miscellaneous					
Legal Advertisements		\$ -	\$ -	\$ -	\$ -
Furniture, Fixtures, and Equipment (FF&E)		\$ -	\$ -	\$ -	\$ -
Technology		\$ -	\$ -	\$ -	\$ -
Technology (Design)		\$ -	\$ -	\$ -	\$ -
Acoustics		\$ -	\$ -	\$ -	\$ -
Criminal Background Checks		\$ -	\$ -	\$ -	\$ -
System Development Charges		\$ -	\$ -	\$ -	\$ -
Value Engineering		\$ -	\$ -	\$ -	\$ -
Utility Connection Fee		\$ -	\$ -	\$ -	\$ -
Unallocated Owner Contingency		\$ -	\$ -	\$ -	\$ -
Inflation		\$ -	\$ -	\$ -	\$ -
Sub Total Soft Cost		\$ -	\$ 139,016	\$ (7,416)	\$ 131,600
Total Project Cost		\$ -	\$ 1,070,902	\$ 711,496	\$ 1,782,398

- | | |
|---|-----------------|
| 1. ReAllocated from Investment Inc (09.30.22) | \$1,897,106 |
| 2. ReAllocated within Budget (09.30.22) | \$ (114,708.00) |
| 3. ReAllocated within Budget (04.30.23) | |
| 4. ReAllocated within Budget (06.30.23) | |



A significant consideration for this bond program was ‘Safety infrastructure to enhance student and staff well-being.’ This was further defined in supplemental documentation to the SEL803 as ‘safety enhancements district-wide.’ To define the projects and assign budgets, the team initially met with the superintendent and board members in the summer of 2019. To further establish how safety and security measures would be implemented, the program executive team convened with a group consisting of the superintendent, a board member, a local police officer, and staff responsible for safety. The outcome of this meeting was the definition of safety and security under three key pillars:

1. **Access Control**
2. **Improved Visibility**
3. **Secure and Welcoming Environment**

Through defining sessions with this group, informational recommendations from experts, and input from staff, each of these pillars was practically implemented:

Access Control

One of the primary areas of focus was ensuring that school buildings remain secure while allowing for efficient and safe entry for students, staff, and visitors. Investments in fencing, gated entry points, and key card access systems have helped regulate who can enter school campuses at any given time. Additionally, secure vestibules were constructed at main entryways, requiring visitors to check in before gaining access to the rest of the building. These measures have created an added layer of security and prevented unauthorized access while maintaining smooth and controlled movement throughout school facilities.

Improved Visibility

Another critical improvement was enhancing visibility in and around school campuses to better monitor activity and respond quickly to any concerns. The installation of high-quality security cameras across all school sites significantly improved visibility, helping administrators and security personnel maintain a clear view of key areas. Additionally, the relocation of front office and administrative staff to new, strategically positioned areas allowed for better oversight of school exteriors, entryways, and high-traffic zones. These changes strengthened situational awareness, enabling school staff to be more proactive in identifying and addressing safety concerns before they escalate.

Secure and Welcoming Environment

While security enhancements were a priority, the District was mindful of creating an environment that feels safe and welcoming rather than imposing. Thoughtful design choices ensured that safety measures blended seamlessly into school architecture rather than resembling a high-security facility. Secure entryways and fencing were integrated in ways that complemented existing structures, while interior spaces remained bright and open to foster a positive atmosphere. This balanced approach reassures students, staff, and families that security is a top priority without compromising the warmth and inclusivity that define our schools. By investing in these improvements, the District took a proactive



stance on safety while preserving the inviting and supportive environment that the community values.

To accomplish these 'safety and security' standards, budgets were developed for each location. Within the SEL803, four major projects were outlined at:

- Ashland Middle School
- Helman Elementary School
- Ashland High School (Humanities Seismic and Science Building renovation)
- Walker Elementary School

In addition to these major projects, District-Wide budgets were established for:

- Technology
- Restrooms
- Security
- HVAC and MEP

These District-Wide budgets were set aside for improvements to sites not impacted by major projects, including:

- Bellview
- Lincoln School
- Willow Wind
- Helman Elementary School (limited to front office and new addition)
- Ashland High School (limited to seismic and science renovations)
- District Office
- Transportation

- Maintenance

Funds from the District-Wide budgets were allocated to projects as they were scoped and initiated.

Budget Allocation and Investment Impact

Over the past six years, the Ashland School District has committed to ensuring the safety and security of students, staff, and the community. With a \$2.85 million budget allocated from the School Bond initiative passed by local voters, the District strategically leveraged resources to implement **\$26,480,369** in critical safety improvements across schools and facilities. These upgrades were guided by the School Board's priorities and focused on Access Control, Improved Visibility, and Creating a Secure Yet Welcoming Environment. By thoughtfully balancing security enhancements with the need for a positive learning atmosphere, the District significantly strengthened school safety while maintaining their inviting nature.

The total spent across the following categories was **\$26,480,369**:

- Relocation of main offices to provide maximized visibility to parking lots
- Safety vestibules
- Building lockdown systems



- Electronic door access
- Video electronic door access
- Security camera system
- Fencing
- IP speakers and clocks for emergency notification systems
- 3D scans of building interiors
- Upgraded fire suppression system
- Upgraded fire alarm system
- Playground safety enhancements
- Seismic upgrades at existing buildings
- Exterior lighting at buildings and parking lots

Conclusion

The Ashland School District has demonstrated a responsible and strategic approach in utilizing bond funds to enhance safety and security. Every decision was made in alignment with the priorities established by the School Board, expert recommendations, and community input. The improvements implemented ensure that students, staff, and visitors experience a secure yet welcoming environment, where safety measures do not compromise the inclusive and inviting nature of the schools. The investments made reflect a commitment to student and staff well-being while maximizing the impact of every dollar allocated for safety and security.



**ASHLAND SCHOOL DISTRICT
CAPITAL BOND PROGRAM
SAFETY AND SECURITY UPGRADES
MARCH 15, 2025**

AMS **\$ 3,963,153**

Main offices moved to provide maximized visibility to parking lot	690	\$ 500	\$ 345,000
Safety Vestibule	160	\$ 500	\$ 80,000
Building Lockdown	6	\$ 4,000	\$ 24,000
Electronic Door Access	41	\$ 5,500	\$ 225,500
Video Electronic Door Access		\$ 5,000	\$ -
Security camera system	63	\$ 5,000	\$ 315,000
Fencing (AMS TRAILS Campus)			\$ 190,640
IP Speakers and Clocks (for emergency notification systems)	196	\$ 3,000	\$ 588,000
3D Scans of building interiors			\$ 33,566
Upgrade Fire Suppression			\$ 589,541
Upgraded fire alarm system			\$ 401,505
Playground			\$ -
Seismic upgrades at existing building			\$ 1,032,927
Exterior lighting at building and parking lot (AMS TRAILS Campus)			\$ 137,474

TRAILS **\$ 688,292**

Main offices moved to provide maximized visibility to parking lot	384	\$ 500	\$ 192,000
Safety Vestibule	192	\$ 500	\$ 96,000
Building Lockdown	3	\$ 4,000	\$ 12,000
Electronic Door Access	28	\$ 5,500	\$ 154,000
Video Electronic Door Access		\$ 5,000	\$ -
Security camera system	15	\$ 5,000	\$ 75,000
Fencing			\$ -
IP Speakers and Clocks (for emergency notification systems)	44	\$ 3,000	\$ 132,000
3D Scans of building interiors			\$ 17,292
Upgraded Fire Suppression (AMS TRAILS Campus)			
Upgraded fire alarm system (AMS TRAILS Campus)			
Playground			\$ 10,000
Seismic upgrades at existing building			\$ -

Exterior lighting at building and parking lot
(AMS | TRAILS Campus)

Walker **\$ 7,416,658**

Main offices moved to provide maximized visibility to parking lot	1960	\$ 500	\$ 980,000
Safety Vestibule	120	\$ 500	\$ 60,000
Building Lockdown	2	\$ 4,000	\$ 8,000
Electronic Door Access	39	\$ 5,000	\$ 195,000
Video Electronic Door Access	1	\$ 5,000	\$ 5,000
Security camera system	46	\$ 5,000	\$ 230,000
Fencing			\$ 280,348
IP Speakers and Clocks (for emergency notification systems)	81	\$ 3,000	\$ 243,000
3D Scans of building interiors			\$ 18,200
Upgrade Fire Suppression			\$ 410,471
Upgraded fire alarm system			\$ 305,300
Playground			\$ 292,729
Seismic upgrades at existing building			\$ 4,316,151
Exterior lighting at building and parking lot			\$ 30,000
Security Grills (Roil up)			\$ 42,459

Helman **\$ 1,055,036**

Main offices moved to provide maximized visibility to parking lot		\$ 500	\$ -
Safety Vestibule		\$ 500	\$ -
Building Lockdown	1	\$ 4,000	\$ 4,000
Electronic Door Access	17	\$ 5,000	\$ 85,000
Video Electronic Door Access	1	\$ 5,000	\$ 5,000
Security camera system	28	\$ 5,000	\$ 140,000
Fencing			\$ 266,765
IP Speakers and Clocks (for emergency notification systems)	65	\$ 3,000	\$ 19,800
3D Scans of building interiors			\$ 19,800
Upgrade Fire Suppression			\$ 107,018
Upgraded fire alarm system			\$ 118,350
Playground			\$ 273,294
Seismic upgrades at existing building			\$ -
Exterior lighting at building and parking lot			\$ -
Security Grills (Roil up)			\$ 16,009

Ashland High School				\$ 13,037,230
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Main offices moved to provide maximized

visibility to parking lot		\$ 500	\$ -
Safety Vestibule		\$ 500	\$ -
Building Lockdown	12	\$ 4,000	\$ 48,000
Electronic Door Access	108	\$ 5,000	\$ 540,000
Video Electronic Door Access		\$ 5,000	\$ -
Security camera system	135	\$ 5,000	\$ 675,000
Fencing			\$ 591,025
IP Speakers and Clocks (for emergency notification systems)	183	\$ 3,000	\$ 549,000
3D Scans of building interiors			\$ 48,100
Upgrade Fire Suppression			\$ 235,232
Upgraded fire alarm system			\$ 1,005,808
Playground			\$ -
Seismic upgrades at existing building			\$ 6,300,000
Science Roofing			\$ 484,982
ADA Access Improvements			\$ 2,560,083

Bellview				\$ 190,000
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Playground			\$ 40,000
Electronic Door Access	3	\$ 5,000	\$ 15,000
IP Speakers and Clocks (for emergency notification systems)	40	\$ 3,000	\$ 120,000
Security camera system	3	\$ 5,000	\$ 15,000

Other Projects				\$ 130,000
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Maintenance

Electronic Door Access	7	\$ 5,000	\$ 35,000
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Transportation

Electronic Door Access	3	\$ 5,000	\$ 15,000
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Willow Wind

IP Speakers and Clocks (for emergency notification systems)	20	\$ 3,000	\$ 60,000
Security camera system	4	\$ 5,000	\$ 20,000

Total				\$ 26,480,369
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ASHLAND PUBLIC SCHOOLS

JACKSON COUNTY SCHOOL DISTRICT #5

BOARD OF DIRECTORS

REBECCA DYSON

JILL FRANKO

RUSSELL HATCH

DANIEL RUBY

EVA SKURATOWICZ

Dr. Joseph Hattrick
Superintendent



Inspire Learning for Life

MICHELLE CUDDEBACK
Assistant Superintendent

STEVE MITZEL
Executive Director, Operations

SHERRY ELY
Interim Business Services Manager

APRIL HARRISON
Director, Student Services

Ashland School District Teacher Appreciation Week

WHEREAS, teachers are the architects of our future, shaping young minds and hearts with knowledge, creativity, and passion; and

WHEREAS, teachers embrace students from every walk of life, celebrating diversity and fostering growth in every individual; and

WHEREAS, the promise of a brighter tomorrow depends on the gift of education given today, lighting the way for all students to succeed; and

WHEREAS, our teachers go above and beyond—pouring their time and energy into planning engaging lessons, offering guidance, and creating opportunities for every student to shine, inside and outside the classroom; and

WHEREAS, our community stands united in admiration and gratitude for the remarkable work our teachers do to nurture the minds and spirits of our children;

NOW, THEREFORE, BE IT RESOLVED that the Ashland School District Board of Directors proclaims **May 5-9, 2025**, as **TEACHER APPRECIATION WEEK**; and

BE IT FURTHER RESOLVED that we invite every member of our vibrant community to take part in this celebration—whether through a kind word, a note of thanks, or a heartfelt gesture—to honor our teachers for their unwavering dedication and the lasting impact they make on our lives.

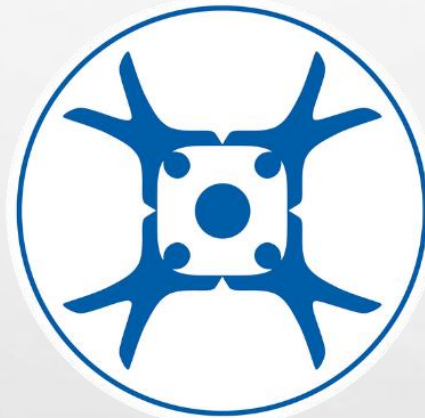
Adopted this 10th day of April, 2025.

Signed:

Rebecca Dyson, Chair
Ashland School District Board of Directors

Joseph Hattrick
Superintendent

BUDGET REDUCTION PLAN FOR THE 2025-26 SCHOOL YEAR



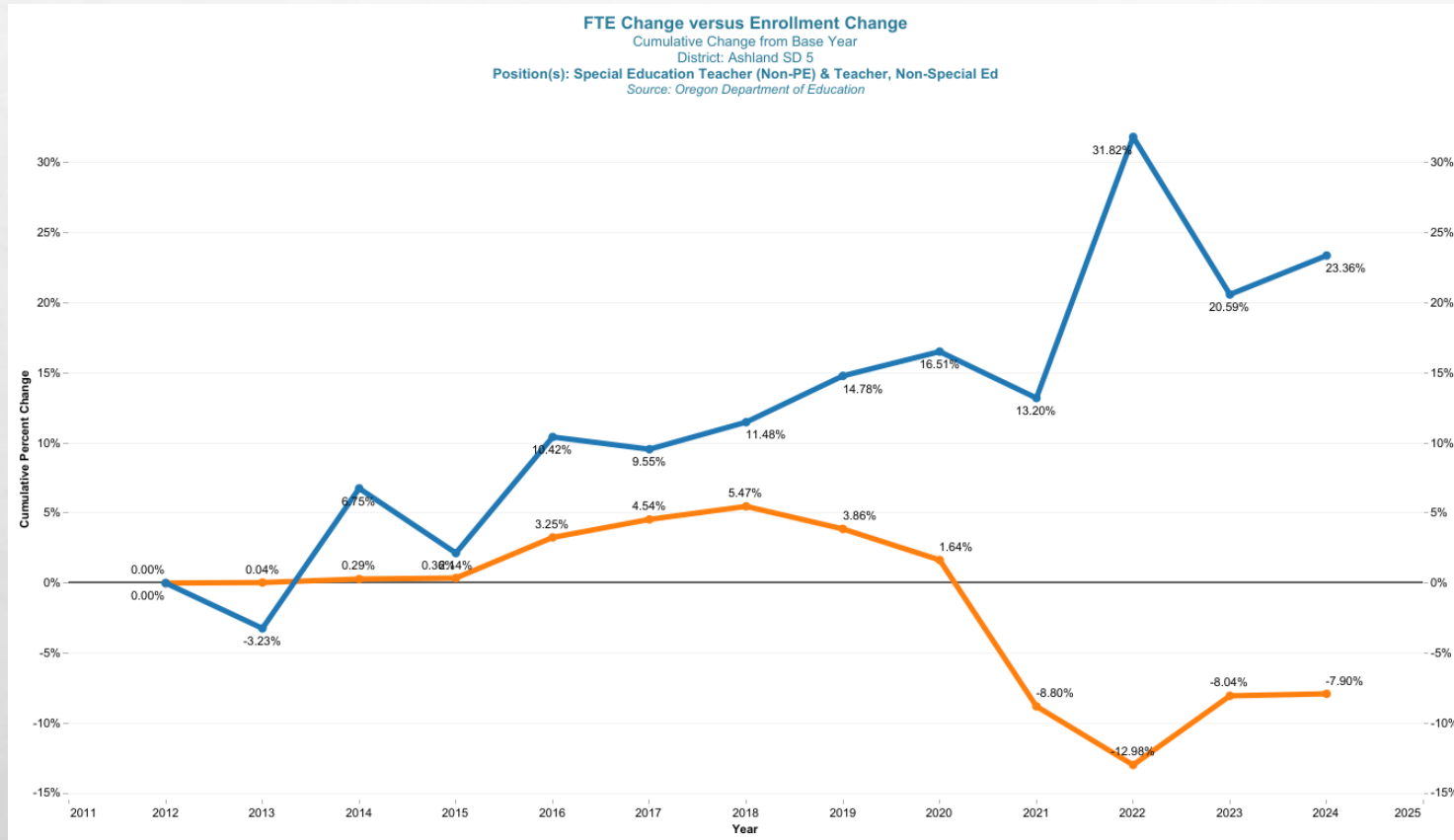
Ashland School District
inspiring learning for life

April 10, 2025

AGENDA

- OVERVIEW OF THE PRIMARY ISSUE
- 2024-25 INTERVENTIONS
- GOAL OF PHASE II THEMATIC OVERVIEW OF THE 2025-26 PLAN
- OVERVIEW BY SITE/DEPARTMENT
- FUTURE CONSIDERATIONS
- NEXT STEPS
- IMPLEMENTATION TIMELINE
- QUESTIONS

OVERVIEW OF ISSUE



General Trend of Overspending

Enrollment Decrease

Staffing Increase (ESSER Funds)

No Reduction of Staff when funds sunset.

ACTION PLAN SUCCESSFULLY IMPLEMENTED


SAVINGS GOAL:
 \$2,200,000
 

Reductions (12/20/2024-6/30/2025)	
Furlough 6 days	-\$824,000
Fields trips cost neutral	-\$30,000
Contracted Service Reduction due to service level needs (1.0 FTE).	-\$85,000
Extra-duty contract reductions	-\$100,000
Sem. 2 Staff Reductions (attrition)	
• 1.0 licensed	-\$50,000
• 2.75 FTE	-\$120,000
• Continue hiring freeze/pause	
Spending freeze/discretionary	-\$100,000
Admin Professional Development & Travel	-\$30,000
TOTAL REDUCTIONS	\$1,339,000

Revenues	
Anonymous donor	+\$890,000

TOTAL PROJECTED SAVINGS FOR 2024-25

\$2,229,000

RESTRUCTURING FOR EFFICIENCY

ASHLAND SCHOOL DISTRICT'S ~27 FTE REDUCTION PLAN

- THIS PRESENTATION OUTLINES OUR COMPREHENSIVE PLAN TO REDUCE ~27 FULL-TIME EQUIVALENT (FTE) POSITIONS ACROSS ASHLAND SCHOOL DISTRICT. WE'LL EXAMINE IMPACTS BY SCHOOL SITE AND DEPARTMENT.

REORGANIZATION STRATEGIES FOR 2025-2026

Ashland School District's comprehensive approach to address financial challenges while preserving educational quality.

STRATEGIC FTE REDUCTIONS

- CAREFULLY PLANNED STAFF REDUCTIONS ACROSS ALL DISTRICT SCHOOLS TO MAXIMIZE EFFICIENCY.
- UTILIZED DATA TO LOOK AT PRE-PANDEMIC STAFFING LEVELS PRIOR TO RECEIVING ESSER FUNDS.

OPERATIONAL REORGANIZATION

- RESTRUCTURING SERVICES TO MAINTAIN ESSENTIAL SUPPORT WHILE REDUCING OPERATIONAL COSTS.
- IDENTIFY INSTRUCTIONAL LEARNING STRATEGIES PAIRED WITH PROFESSIONAL DEVELOPMENT THAT RESEARCH DEMONSTRATES RESULTS IN HIGHER STUDENT OUTCOMES - BLENDED CLASSROOMS.

PROGRAM OPTIMIZATION

- ENSURING ALL SCHOOLS HAVE AN AVERAGE AND/OR MINIMUM OF 25 STUDENTS/CLASS.
- ENSURE PROFESSIONAL DEVELOPMENT PROVIDES SUPPORTS FOR STAFF THROUGH PROGRAM CHANGES.

ASHLAND HIGH SCHOOL REDUCTIONS

3.17 CERTIFIED FTE REDUCTION

- 1.0 HUMANITIES (TEMPORARY)
- 1.0 MATH (TEMPORARY)
- 1.17 MISCELLANEOUS FTE

GOA RESTRUCTURING

- POTENTIAL REDUCTION
- EVALUATING ONLINE PROGRAM

BELL SCHEDULE TIMELINE

- MAINTAIN CURRENT SCHEDULE FOR 25-26
- FORM COMMITTEE IN FALL '25
- IMPLEMENT CHANGES FOR 26-27 (FTE POTENTIAL REDUCTION)

ASHLAND MIDDLE SCHOOL REDUCTIONS

TOTAL REDUCTIONS

- 3.93 FTE CERTIFIED STAFF
- 2.5 FTE CLASSIFIED STAFF

TOTAL: 6.43 FTE REDUCTION

TEAM STRUCTURE CHANGES

- REMOVING 4TH HOMEROOM FROM 6TH GRADE
- CREATING TWO 5-PERSON TEAMS IN 7TH/8TH GRADES
- ALT ED PROGRAM WITH TWO TEACHERS FOR 22 STUDENTS (BRINGS 7TH/8TH CLASS SIZE TO ~30)

PROGRAM ADJUSTMENTS

- REDUCING ENCORE SECTIONS (1.0-1.25 FTE)
- REMOVING LEADERSHIP AS AN ENCORE OPTION
- MAINTAINING CURRENT SCHEDULE STRUCTURE

BELLVIEW ELEMENTARY SCHOOL

TOTAL FTE REDUCTION = 2.08 FTE

1.0 CERTIFIED CLASSROOM
TEACHER

1.08 FTE CLASSIFIED EDUCATIONAL
ASSISTANTS

CURRENTLY HAVE 11 CLASSROOMS

- REDUCE TO 10 CLASSROOMS RESULTING IN LARGER CLASS SIZES ACROSS GRADES

STUDENT ENROLLMENT = 251

- MAINTAIN CURRENT PROGRAMS WITH FEWER STAFF

SPECIALISTS WILL TAKE ONE GRADE OF CORE INSTRUCTION FOR BLENDED BANDS. INTERVENTION BLOCKS WILL BE COMBINED FOR BLENDED GRADES WITH ALL AVAILABLE ADULTS RUNNING GROUPS.

HELMAN ELEMENTARY SCHOOL REDUCTIONS

STAFFING IMPACT = 4.6375 FTE REDUCTION

PROGRAM STRUCTURE = 10 CLASSROOMS (K-5) WITH BLENDED K/1 AND 2/3 GRADES.

REDUCTION INCLUDES 2.0 FTE CLASSROOM TEACHERS, 2.6375 FTE CLASSIFIED STAFF.

CURRENT ENROLLMENT REMAINS AT 264 STUDENTS.

WALKER ELEMENTARY SCHOOL REDUCTIONS

STAFF REDUCTION IMPACT

1.78 TOTAL FTE REDUCTION

- 1.0 FTE CLASSROOM TEACHER
- .78 FTE CLASSIFIED

CLASS STRUCTURE

10 TOTAL CLASSROOMS WITH

- KINDERGARTEN
- 1ST
- 2/3 BLENDS
- 4/5 BLENDS

Walker Elementary maintains 244 students with reduced staffing. Class sizes range from 18-19 students in primary grades to 26-27 in upper elementary. Will continue to monitor enrollment to adjust as necessary.

WILLOW WIND COMMUNITY LEARNING CENTER

NO SCHEDULE CHANGE

- MAINTAIN TEACHER PREP TIME OUTSIDE OF THE STUDENT DAY AT SCHOOL'S REQUEST TO INCREASE EFFICIENCIES.

ENROLLMENT GROWTH THROUGH CLASS SIZE ADJUSTMENT

- INCREASE OF ~15 STUDENTS
- 25 STUDENTS PER CLASS

SUPPORT STAFF REDUCTION

- .975 REDUCTION IN CLASSIFIED STAFF

TRAILS OUTDOOR SCHOOL

PROGRAM ENHANCEMENTS

- MAXIMIZE USE OF VOLUNTEERS FOR FIELD TRIPS
- MAINTAIN CORE OUTDOOR EDUCATION FOCUS

STAFFING REDUCTIONS (1.3 TOTAL)

- .3 FTE CLASSIFIED
- 1.0 FTE CERTIFIED

ENROLLMENT STABILIZATION

- ONLY FILL OPENINGS IN CLASSES BELOW CLASS SIZE TARGET OF 25.

STUDENT SERVICES REORGANIZATION

NEW PROGRAM DEVELOPMENT

- CREATING SITE-BASED CLASSROOM AT AHS.

EDUCATIONAL ASSISTANT REDISTRIBUTION

- REALLOCATING SUPPORT ACROSS SITES AND PROGRAMS

ADMINISTRATIVE CHANGES

- SPED CLERK STIPEND REDUCTION

TOTAL REDUCTION ACROSS STUDENT SERVICES IS APPROXIMATELY 5.15 FTE POSITIONS, PRIMARILY FROM EDUCATIONAL ASSISTANT REALLOCATION.

FUTURE CONSIDERATIONS

FACILITY OPTIMIZATION

- POTENTIAL BUILDING MERGER, CONSOLIDATION, OR CLOSURE*
- ADDING ADDITIONAL PRE-K OPTIONS TO EXISTING BUILDINGS

PROGRAM DEVELOPMENT

- INCREASE ENROLLMENT
- ENHANCE DISTRICT VIRTUAL PROGRAM
- EXPLORE POTENTIAL FOR THE DEVELOPMENT OF A DISTRICT-SPONSORED ONLINE CHARTER.

BUDGET OPPORTUNITIES

- DETERMINE LOAN NEXT STEPS
- CONTINUE TO EVALUATE LINE-ITEM REDUCTIONS
- CONTINUE TO IDENTIFY ADDITIONAL SOURCES OF REVENUE
 - GRANTS, DONORS, FUNDRAISERS, PARTNERS, AND ENROLLMENT

* Dependent on enrollment growth

NEXT STEPS

- **UNION COLLABORATION**

- CONTINUE ENGAGEMENT WITH BOTH LABOR UNIONS TO ENSURE TRANSPARENT COMMUNICATION AND COLLABORATIVE IMPLEMENTATION.
- DETERMINE REDUCTION IN FORCE LIST.

STAFF TRANSITION PLANNING

- MEET WITH IMPACTED STAFF AND PROVIDE SUPPORTS INCLUDING REGIONAL OPPORTUNITIES THAT ARE AVAILABLE.

IMPLEMENTATION TIMELINE



Throughout this transition, we'll maintain transparent communication with families and staff while providing ongoing support and resources for those affected by these changes.

QUESTIONS AND DISCUSSION

MONTHLY SCHOOL BOARD FINANCIAL REPORT

Ashland School District No. 5
Financial Data through the Month Ending March 31, 2025



April 10, 2025
Board Meeting

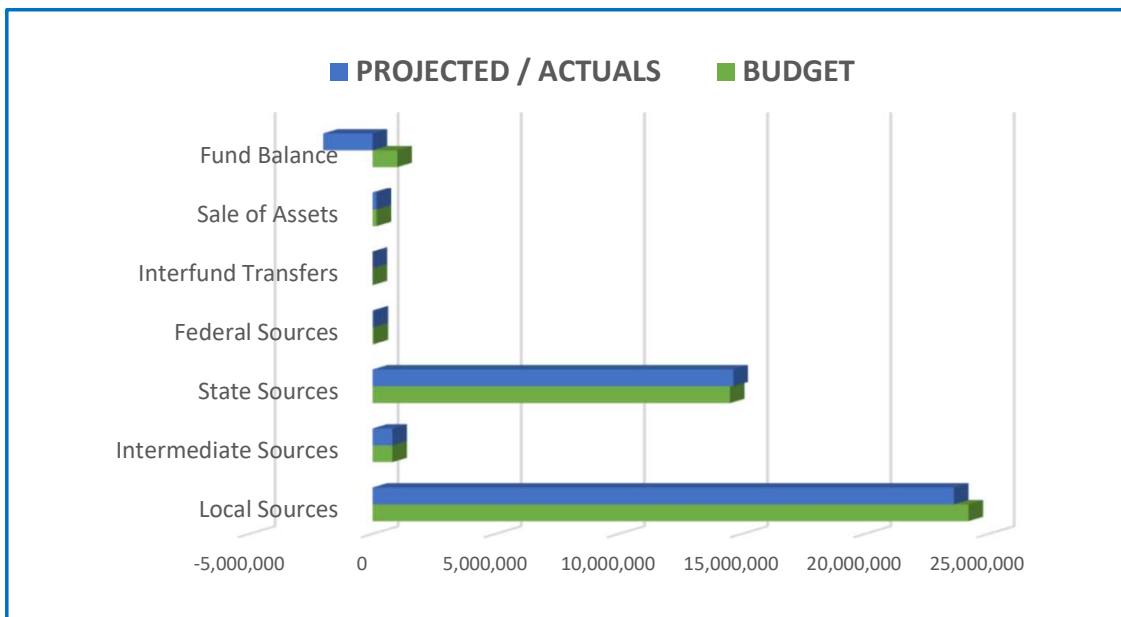
Presented By: Sherry Ely, Director of Business Services

2024.2025 GENERAL FUND (100)

REVENUE

Financial Data Ending March 31, 2025

REVENUE SOURCES BY FUNCTION		BUDGET	PROJECTED / ACTUALS	VARIANCE - Over Budget/(Under Budget)
Local Sources	1000	24,185,000.00	23,591,623.47	(593,376.53)
Intermediate Sources	2000	800,000.00	800,000.00	0.00
State Sources	3000	14,508,000.00	14,647,906.58	139,906.58
Federal Sources	4000	40,000.00	40,000.00	0.00
Interfund Transfers	5200	0.00	0.00	0.00
Sale of Assets	5300	160,000.00	160,000.00	0.00
Fund Balance	5400	1,000,000.00	(2,004,189.00)	(3,004,189.00)
		40,693,000.00	37,235,341.05	(3,457,658.95)



NOTES

Current year revenues are, for the most part, in line with budget. We did see a modest uptick in March local revenue collections as well as a slight reduction in State School Funding for March - this resulted in a very slight reduction in revenue collections through the end of March.

On a positive note - compared to February, the District has reduced the deficit, compared to February, by \$371,820. The reduction in expenses has reduced the anticipated negative ending fund balance to \$2,266,239. With the savings that I believe we will see in April through June - this will have a further positive impact on the ending fund balance.

Local Sources Include: Property Taxes, Reimbursements, Fees, and other Misc. Revenue.

Intermediate Sources Include: Flowthrough from ESD.

Federal Sources include: Federal Forest Fees

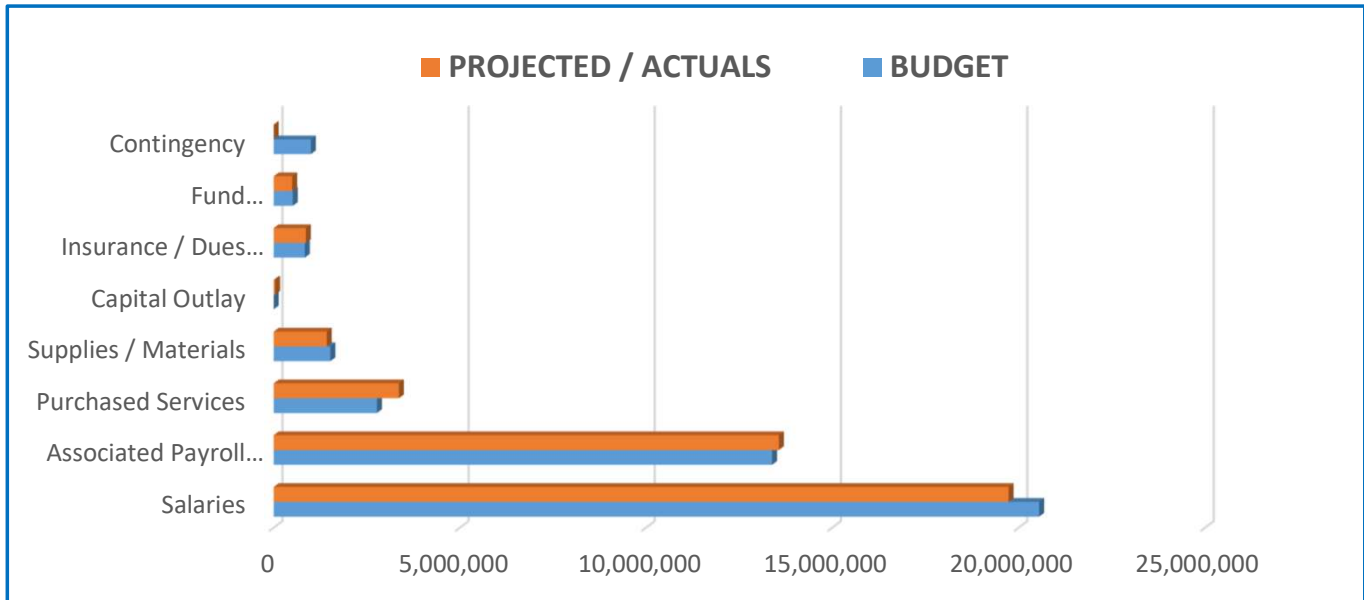
Sale of Assets include: Payment for the Sale of Briscoe

2024.2025 GENERAL FUND (100)

EXPENSES

Financial Data Ending March 31, 2025

EXPENSES BY OBJECT		VARIANCE - Under Budget/(Over Budget)		
		BUDGET	PROJECTED / ACTUALS	
Salaries	100	20,553,696.00	19,734,042.73	819,653.27
Associated Payroll Costs	200	13,388,754.00	13,570,085.96	(181,331.96)
Purchased Services	300	2,774,708.00	3,366,481.51	(591,773.51)
Supplies / Materials	400	1,522,417.00	1,425,257.83	97,159.17
Capital Outlay	500	0.00	41,166.32	(41,166.32)
Insurance / Dues / Fees/Loan Pmnt	600	838,425.00	864,545.95	(26,120.95)
Fund Transfers/Flow Thru	700	515,000.00	500,000.00	15,000.00
Contingency	800	1,000,000.00	0.00	1,000,000.00
		40,593,000.00	39,501,580.30	1,091,419.70



NOTES

There is always a potential to use contingency as the school year winds down if unanticipated expenditures occur or if we have an appropriation issue in one of the major General Fund Function categories.

We did see a reduction in March expenses in the Associated Payroll And Purchased Service categories; however we did see an increase in the 6xx object category - this was due to a bus lease payment that I was unaware of - it is not an expense that occurred at this same time last year.

Overall - expenditures are trending toward moderate savings, and I anticipate we will see additional savings April through June - which will result in reducing the projected negative ending fund balance.

Source	2024-25 Budget	Actual YTD Rev. 03.31.2025	Projected through 6/30/2025	Total Estimated 2024-25	(Over)/Under Budget	2023-24 Budget	Actual YTD Rev. 6/30/2024
SSF Funding							
1111 Current Year Property Taxes	17,475,000	16,036,275	754,100	16,790,375	684,625	16,637,078	16,950,000
1112 Prior Year Property Taxes	-	-	-	-	-	43,160	-
1190 Penalties & Interest on Taxes		9,337		9,337		10,921	
3101 State School Support Funds	14,004,000	11,706,097	2,443,071	14,149,168	(145,168)	13,652,197	12,475,000
3101 SSF - Due to ODE		-	-		-		
3103 Common School Fund	354,000	174,368	174,371	348,739	5,261	339,114	335,000
Total SSF Funding	31,833,000	27,926,077	3,371,542	31,297,619	544,718	30,682,470	29,760,000
Total SSF Revenue	\$ 31,833,000	\$ 27,926,077	\$ 3,371,542	\$ 31,297,619	\$ 544,718	\$ 30,682,470	29,760,000
Non State School Support Formula Sources							
Local Sources							
1120 Local Option	5,200,000	4,535,537	207,753	4,743,290	456,710	4,792,851	4,800,000
1123 Local Option Penalties & Interest		2,645		2,645	(2,645)	3,178	
1311 and 1312 Tuition	50,000	28,696	22,260	50,956	(956)	65,604	50,000
1412 Transportation Fees	25,000	12,456	21,190	33,646	(8,646)	18,576	25,000
1510 Earnings on Investments	900,000	491,044	270,000	761,044	138,956	857,986	650,000
1740 Fees	-	1,100		1,100	(1,100)	1,050	-
1910 Rentals	75,000	14,231	54,769	69,000	6,000	55,828	85,000
1920 Donations from Private Sources	25,000	907,651		837,750	(812,750)	141	25,000
1940 Serv Provided to Other districts	25,000	6,385	18,615	25,000	-	6,131	50,000
1960 Recovery of Prior Year Expenditures	10,000	11,317	164	11,481	(1,481)	(12,367)	10,000
1980 Fees Charged to Grants	300,000	53,850	102,150	156,000	144,000	153,744	300,000
1990 Miscellaneous Local Revenue	100,000	77,691	22,309	100,000	-	66,421	155,000
Total Non Formula Local Sources	6,710,000	6,142,602	719,210	6,791,911		6,009,144	1,350,000
Intermediate Sources							-
2199 - Other Inter. Sources	800,000	346,302	453,698	800,000		532,048	700,000
Total Intermediate Sources	800,000	346,302	453,698	800,000	-	532,048	700,000
State/Federal Sources							
3299 Rest. From state	150,000	-	150,000	150,000		65,766	50,000
4700 Federal Rev	10,000	-	10,000	10,000			10,000
4801 Federal Forest	30,000	-	30,000	30,000		30,054	30,000
Total State/Federal Sources	190,000	-	190,000	190,000	-	95,820	90,000
Other Sources							-
5300 Sale/Loss of Fixed Assets	160,000	-	160,000	160,000	-	160,000	160,000
5400 Beginning Fund Balance	1,000,000	(2,004,189)		(2,004,189)	3,004,189	1,580,008	2,490,000
Total Other Sources	1,160,000	(2,004,189)	160,000	(1,844,189)	3,004,189	1,740,008	2,650,000
Total Non SSF Revenue	\$ 8,860,000	\$ 4,484,715	\$ 1,522,908	\$ 5,937,722	\$ 3,004,189	\$ 8,377,019	\$ 4,790,000
Total Resources	\$ 40,693,000	\$ 32,410,793	\$ 4,894,450	\$ 37,235,341	\$ 3,548,907	\$ 39,059,489	\$ 34,550,000
		Less Estimated Requirements		\$ 39,501,580	\$ 39,239,530		
		Estimated Ending Fund Balance		\$ (2,266,239)			

	2024-25 Budget	Actual YTD EXP 03.31.2025	Projected through 06.30.2025	Total Estimated 2024-25	(Over)/ Under Budget	% Committed	2023-24 Budget	Actual YTD Exp. 6/30/2024
Instruction								
1111 Elementary, K-5 or K-6	6,538,880	3,803,306	2,604,796	6,408,102	130,778	98.00%	6,788,573	7,515,609
1113 Elementary Extracurricular	5,487	5,774	1,158	6,932			4,504	8,199
1121 Middle/Junior High Programs	4,073,028	2,323,673	1,667,894	3,991,567	81,461	98.00%	3,889,808	4,221,220
1122 Middle/Junior High School Extracurricular	250,513	178,797	66,705	245,502	5,010	98.00%	196,801	233,407
1131 High School Programs	5,378,092	2,967,599	2,303,775	5,271,374	106,718	98.02%	5,166,672	5,431,969
1132 High School Extracurricular	1,001,076	557,035	403,997	961,033	40,043	96.00%	831,536	810,409
1210 Programs for the Talented and Gifted	11,872	3,706	5,228	8,934	2,938	75.25%	10,140	7,111
1220 Restrictive Pgms for Students w/Disabilities	77,941	43,746	23,169	66,915	11,026	85.85%	84,183	66,928
1227 Extended School Year	5,000	2,961	1,039	4,000			5,000	4,314
1250 Programs for Students w/Severe Disabilities	4,250,890	2,317,262	1,848,610	4,165,872	85,018	98.00%	3,326,905	3,777,768
1280 Alternative Education	1,695,037	970,029	691,107	1,661,136	33,901	98.00%	1,675,890	1,935,584
1291 English Second Language Programs	144,493	82,846	58,758	141,603	2,890	1	179,627	226,686
Total Instruction	\$ 23,432,308	\$ 13,256,735	\$ 9,676,236	\$ 22,932,971	\$ 499,782		\$ 22,159,638	\$ 24,239,204
Support Services								
2110 Attendance and Social Work Services	60,641	43,746	16,123	59,869	772	98.73%	57,626	48,822
2115 Student Safety	-	-	-	-	-		13,560	-
2120 Guidance Services	815,859	473,148	342,712	815,859	-	100.00%	745,033	810,331
2130 Health Services	307,844	97,648	210,196	307,844	-	100.00%	307,864	310,533
2140 Psychological Services	151,482	154	-	154	151,328	0.10%	5,000	187,379
2150 Speech Pathology and Audiology Services	443,150	370,579	204,045	574,624	(131,475)	129.67%	333,153	285,925
2190 Service Directions, Student Support Svcs	421,685	366,022	122,159	488,181	(66,496)	115.77%	549,153	514,588
2210 Improvement of Instruction Services	109,473	137,177	42,941	180,118	(70,645)	164.53%	215,977	112,494
2220 Library/Media Center	295,933	192,375	81,913	274,287	21,645	92.69%	458,611	425,067
2230 Assessment and Testing	8,150	84,841	6,316	91,157	(83,007)	1118.49%	8,150	91,157
2240 Staff Development	59,565	16,854	42,711	59,565	-	100.00%	78,760	125,162
2310 Board of Education	200,218	250,843	2,250	253,093	(52,875)	126.41%	174,600	334,356
2320 Office of the Superintendent Services	460,536	340,058	120,478	460,536	-	100.00%	438,827	497,973
2410 Office of the Principal Services	3,249,747	2,243,558	1,012,689	3,256,247	(6,499)	100.20%	3,091,612	3,232,871
2490 Other Support Services—School Administration	900	74,402	54,866	129,268	(128,368)		189,198	187,235
2520 Fiscal Services	698,012	546,278	148,244	694,522	3,490	99.50%	649,782	768,041
2540 Fiscal Services	4,285,988	3,312,718	930,410	4,243,128	42,860		3,874,114	4,355,947
2543 Care and Upkeep of Grounds Services	39,000	29,573	5,158	34,731	4,269	89.05%	39,000	34,731
2550 Student Transportation Services	1,212,286	1,087,633	215,505	1,303,138	(90,852)	107.49%	1,173,752	1,589,411
2640 Staff Services	406,258	224,218	182,040	406,258	-	100.00%	400,788	519,107
2660 Technology Services	2,130,580	1,683,950	427,377	2,111,327	19,253	99.10%	2,140,983	2,121,636
2700 Supplemental Retirement	283,386	249,693	75,009	324,703	(41,316)		302,316	262,078
Total Support Services	\$ 15,640,692	\$ 11,825,468	\$ 4,243,142	\$ 16,068,610	\$ (427,917)		\$ 15,247,862	\$ 16,814,843
Community Services								
3300 Welfare Activities Services	5,000	-	-	-	-		5,000	-
Total Community Services	\$ 5,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,000	\$ -
Other Requirements								
5200 Transfers of Funds	500,000	-	500,000	500,000	-	100.00%	350,000	6,484
5300	15,000	-	-	-	-		15,000	-
6000 Contingency	1,000,000	-	159	-	1,000,000	100.00%	500,000	-
7000 Unappropriated Ending Fund Balance	-	-	-	-	-	100.00%	1,500,000	-
Total Other Requirements	\$ 1,515,000	\$ -	\$ 500,000	\$ 500,000	\$ 1,000,000		\$ 2,365,000	\$ 6,484
Total Requirements	\$ 40,593,000	\$ 25,082,203	\$ 14,419,378	\$ 39,501,580	\$ 1,071,865		\$ 39,777,500	\$ 41,060,531

General Fund (100)		Appropriations	YTD	Encumbrances	Totals	Resolutions	(Over)/Under Budget
1000 Instruction	\$	23,432,308	\$ 13,256,735	\$ 9,676,236	\$ 22,932,971		\$ 499,337
2000 Support Services	\$	15,640,692	\$ 11,825,468	\$ 4,243,142	\$ 16,068,610		\$ (427,917)
3000 Community Services	\$	5,000	\$ -	\$ -	\$ -		\$ 5,000
5200 Transfers	\$	500,000	\$ -	\$ 500,000	\$ 500,000		\$ -
6000 Contingency	\$	1,000,000	\$ -	\$ -	\$ -		\$ 1,000,000
Sub Total	\$	40,578,000	\$ 25,085,933	\$ 14,419,378	\$ 39,501,580		\$ 1,076,420
Special Revenue Funds							
1000 Instruction	\$	4,752,000	\$ 1,979,607	\$ 1,092,590	\$ 3,072,197		\$ 1,679,803
2000 Support Services	\$	2,648,000	\$ 1,186,337	\$ 691,020	\$ 1,877,357		\$ 770,643
3000 Community Services	\$	1,291,590	\$ 901,669	\$ 214,620	\$ 1,116,289		\$ 175,301
4000 Facility Acquisition	\$	40,000	\$ -	\$ -	\$ -		\$ 40,000
5200 Transfers	\$	25,000	\$ -	\$ -			
Sub Total	\$	8,756,590	\$ 4,067,613	\$ 1,998,230	\$ 6,065,843		\$ 2,665,747
PERS Bond Debt Service (302, 303, 304)							
5100 Debt Service	\$	7,813,900	\$ 2,337,200	\$ 5,727,200	\$ 8,064,400		\$ (250,500)
Sub Total	\$	7,813,900	\$ 2,337,200	\$ 5,727,200	\$ 8,064,400		\$ (250,500)
Facilities (400)							
2000 Support Services	\$	1,110,000	\$ 282,261	\$ 65,935	\$ 348,196		\$ 761,804
4000 Facilities Acquisition	\$	24,150,000	\$ 11,896,882	\$ 4,000,000	\$ 15,896,882		\$ 8,253,118
5200 Transfers	\$	-	\$ -	\$ -	\$ -		\$ -
Sub Total	\$	25,260,000	\$ 12,179,143	\$ 4,065,935	\$ 16,245,078		\$ 9,014,922
Internal Service Funds (600)							
2000 Support Services	\$	8,465,000	\$ 6,280,390	\$ 2,819,898	\$ 9,100,288		\$ (635,288)
5200 Transfers	\$	25,000	\$ -	\$ -	\$ -		\$ 25,000
Sub Total	\$	8,490,000	\$ -	\$ -	\$ 9,100,288		\$ (610,288)
Trust & Agency Funds (700)							
1000 Instruction	\$	-			\$ -		\$ -
2000 Support Services	\$	-	\$ -	\$ -	\$ -		\$ -
3000 Community Services	\$	220,000	\$ 164,616	\$ -	\$ 164,616		\$ 55,384
6000 Contingency	\$	10,000		\$ -	\$ -		\$ 10,000
Sub Total	\$	230,000	\$ 164,616	\$ -	\$ 164,616		\$ 65,384
Total Appropriations		\$ 91,128,490	\$ -	\$ 160 -	\$ 79,141,806	\$ -	\$ 11,961,684
Total Unappropriated		\$ 4,715,000	\$ -	\$ -	\$ -		\$ 4,715,000
TOTAL		\$ 95,843,490	\$ -	\$ -	\$ 79,141,806		\$ 16,676,684

Ashland SD 5 - Outcomes and Strategies 25-27



	Identifier	Outcome or Strategy
1	Outcome Early Lit	Increase proficiency in 3rd grade reading for all students and students in focal groups to 68% by 2028.
2	Strategy Early Lit 1	Provide research based literacy instruction to all students K-3
3	Strategy Early Lit 2	Fully implement newly adopted K-3 ELA curriculum
4	Strategy Early Lit 3	Implement a K–12 multi-tiered system of support in academics and attendance using a reliable assessment data system to measure student progress.
5	Outcome A	Increase graduation rates for all students and students in focal groups to 95% by 2028.
6	A1	Provide equitable access to academic instruction for all students and particularly those in focal groups in grades K-12
7	A2	Provide equitable access to social, behavioral, and mental health supports for students in grades K-12
8	A3	Provide high-quality, research-based professional development for staff to better understand and support all students, with particular attention to students who have currently and historically been underserved.
9	A4	Create systems to measure the degree to which staff implement the professional development received and its impact on student achievement
10	A5	Implement a K–12 multi-tiered system of support in academics, behavior, mental health, and attendance using a reliable assessment data system to measure student progress.
11	Outcome B	Increase the number of students prepared for postsecondary success
12	B1	Provide training and support to staff on removing barriers to enrollment in courses and pathways, with particular attention to students who have currently and historically been underserved.
13	B2	Increase student, family, and community awareness of educational opportunities and programs offered within ASD.
14	B3	Remove financial barriers to programs for students especially focal group students
15	B4	Strengthen collaboration with regional partners who represent or serve underserved populations through partnerships, trainings, and college and career exploration
16	Outcome C	Increase the rate that students, staff, and families report experiencing a safe, welcoming, supportive, and inclusive environment
17	C1	Develop a system to analyze yearly climate surveys, bias incidents reports, attendance, and discipline data, with particular attention to focal groups, to establish goals and draft plans
18	C2	Provide interpretation and translation services for families and staff who communicate in a language in other than English
19	C3	Reduce barriers for stakeholders to increase access and participation to the Superintendent's Advisory Council.

Ashland SD 5 - Budget Integrated Prog 25-27



	Prepopulation Response	Activity ID #	Outcome and Strategy	Activity	Partnership	25-27 Biennium FTE Total	FTE Type	Early Literacy Success Allowable Use Code	EIIS Allowable Expenditure Area	HSS Activity Category	SIA Allowable Use Category	Object Code	FTE 25-26	Early Literacy Success Activity Budget 25-26	EIIS Activity Budget 25-26	HSS Activity Budget 25-26	SIA Activity Budget 25-26	Total Activity Budget 2025-26 (autosum)	FTE 26-27	Early Literacy Success Activity Budget 25-27	
1				Total Allocation																	
2				Unbudgeted (Autocalculate)										\$157,438.20	\$7,594.83	\$756,061.83	\$2,507,495.33	\$3,428,590.19		\$163,864.25	
3				Total Budgeted Amounts (Autosum)										\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00	
														\$157,438.20	\$7,594.83	\$756,061.83	\$2,507,495.33	\$3,428,590.19		\$163,864.25	
4		1		Indirect/Administration									690		7872		30242.47	125374.77		\$8,193.21	
5		2 A2		Retain .5 behavioral health specialists			1	Supports: Behavioral Specialist			H&S	111		0.5			45000	\$45,000.00	0.5		
6		5 A2, A5		Retain Elementary Child Development Specialists			4	Supports: School Counselor/School Social			H&S	111		2			261201.9	\$261,201.90	2		
7		6 A2, A5, B1, D1		Retain secondary counselors			4	Supports: School Counselor/School Social		DP STA	H&S	111		2		\$202,219.36	\$250,727.77		2		
8		7 A2		Retain Youth Advocates			7	Supports: Social Emotional Learning (SEL)			H&S	112		3.5			172391.48	\$172,391.48	3.5		
9		8 A1, A5		Maintain the increased FTE to Support English Language Learners			2.2	Language: English Language			WRE	111		1.1			112495.92	\$112,495.92	1.1		
10		9 A3, A4, A5, B1,		Retain 1 instructional and data coach			2	Supports: Other			RCS	111		1			121000	\$121,000.00	1		
11		10 A1, A5		Retain intervention teachers			4.306	Supports: Intervention Specialist			RCS	111		2.153			225076.53	\$225,076.53	2.153		
12		12 A1		Retain Instructional Supports			15.6	Supports: Intervention Specialist			RCS	111		7.8			770175.55	\$770,175.55	7.8		
13		17 B1, B2,B3		Retain expanded opportunities for student participation			3.33	Arts (Applied): CTE (Approved Program of		CTE STA *Start Up/Approved		111		3.33			430000	\$430,000.00			
14		19 B3		Provide financial assistance for any associated costs for students						CLO OCG *Must lead to college		640					15000	\$15,000.00			
15		20 B4		Continue partnership with Project Youth+						DP OCG		31X					12000	\$12,000.00			
16		21 D1		Retain middle school counseling support			2	Supports: School Counselor/School Social		DP MS8	H&S	111		1			27500	\$137,500.00	1		
17		22 A1		Continue purchasing credit recovery curriculum opportunites for high						DP CUR		640					16000	\$16,000.00			
18		23 A1		Retaining Ashland Connect and GOA Instructional Staff			2.4	Supports: Other		DP CUR		111		1.2			152000	\$152,000.00	1.2		
19		24 A1		Retain Grant Implementation Specialist			0.4	Supports: Other		DP STA	WRE	113		0.2			37035	\$37,035.00	0.2		
20		25 A1, A5		Staff time to develop or purchase curriculum for online program						DP ESF							46900	\$70,000.00			
21		26 A1		Purchase Intervention and Instructional Materials				CTPD									23100	\$10,000.00			
22		27 EL1, EL3		Purchase Supplemental Instructional Materials for K-5 ELA				CRCM			IIT						10000	\$50,000.00		10000	
23		28 EL1, EL2, EL3		Provide Professional Development				CTPD			WRE						15443.77	\$30,009.97		54767.65	
24		29 EL3, EL1		Pay for Summer Learning for K-3				ELPSS										20000	\$20,000.00		25903.39
25		30 EL1, EL3		Hiring Staff to Provide High Dosage Tutoring for K-3			4	Qualified Tutor (Early Literacy)	SGHDT					2			65000	\$65,000.00	2	65000	
26		31 B3, B4		Purchase Consumables						CTE ESF *Start Up/Approved	WRE						10000	\$10,000.00			
27		32 A1, A5		Hire Attendance Advocate			2	Other: Other staff position not listed		DP STA	IIT			1			60000	\$60,000.00	1		
28		33 A1, A5		Hire Secondary Instructional Coach			2	Other: Other staff position not listed			WRE			1			131892	\$131,892.00	1		
29		34 C1		Pay Staff to meet in MTSS Teams					TRN		WRE					7594.83		\$7,594.83			
30		35 A1,A5		Provide Instructional Staff for Small Group Instruction for Middle School			2				IIT			1			45000	\$45,000.00	1		
31		36 C3		Provide Childcare, staff time, food and materials for Superintendent's							OCG						8000	\$8,000.00			

Ellis Activity Budget 26-27	HSS Activity Budget 26-27	SIA Activity Budget 26-27	Total Activity Budget 2026-27 (autosum)	2025-27 Biennium Activity Budget	Last Updated
\$7,594.83	\$786,921.50	\$2,609,842.08	\$3,568,222.66	\$6,996,812.85	03/19/25 4:55 PM
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	04/09/25 8:27 AM
\$7,594.83	\$786,921.50	\$2,609,842.08	\$3,568,222.66	\$6,996,812.85	04/09/25 8:27 AM
	\$31,476.86	\$130,492.10	\$170,162.17	\$333,651.41	04/08/25 9:53 AM
		47000	\$47,000.00	\$92,000.00	04/08/25 9:58 AM
		280000	\$280,000.00	\$541,201.90	04/08/25 10:40 AM
	215000	52000	\$267,000.00	\$517,727.77	04/08/25 10:04 AM
		184720.13	\$184,720.13	\$357,111.61	04/08/25 10:10 AM
		117000	\$117,000.00	\$229,495.92	04/08/25 10:40 AM
		126000	\$126,000.00	\$247,000.00	04/08/25 10:20 AM
		250000	\$250,000.00	\$475,076.53	04/08/25 10:13 AM
		790000	\$790,000.00	\$1,560,175.55	04/08/25 4:38 PM
	437344.64		\$437,344.64	\$867,344.64	04/09/25 9:17 AM
	15000		\$15,000.00	\$30,000.00	04/08/25 9:37 AM
	12000		\$12,000.00	\$24,000.00	04/07/25 10:26 AM
	27000	115000	\$142,000.00	\$279,500.00	04/08/25 10:20 AM
	16000		\$16,000.00	\$32,000.00	04/07/25 10:53 AM
		160000	\$160,000.00	\$312,000.00	04/08/25 10:40 AM
		40000	\$40,000.00	\$77,035.00	04/08/25 9:37 AM
	23100	46900	\$70,000.00	\$140,000.00	04/09/25 10:44 AM
		9638.72	\$9,638.72	\$19,838.72	04/09/25 8:19 AM
			\$10,000.00	\$60,000.00	04/08/25 8:41 AM
		12863.13	\$67,630.76	\$97,640.75	04/09/25 8:27 AM
			\$25,903.99	\$45,903.99	04/08/25 10:28 AM
			\$65,000.00	\$130,000.00	04/09/25 11:14 AM
	10000		\$10,000.00	\$20,000.00	04/09/25 11:14 AM
			\$0.00	\$60,000.00	04/09/25 11:14 AM
		135028	\$135,028.00	\$266,920.00	04/09/25 11:14 AM
7594.83		60000	\$67,594.83	\$75,189.66	04/09/25 11:14 AM
		45000	\$45,000.00	\$90,000.00	04/09/25 11:14 AM
		8000	\$8,000.00	\$16,000.00	04/09/25 11:14 AM

Ashland SD 5 - Tiered Planning 25-27



Outcome and Strategy	Activity	Partnership	FTE	FTE Type	Perkins Function Code	Early Literacy Success Allowable Use Code	EIIS Allowable Expenditure Area	HSS Activity Category	SIA Allowable Use Category	Object Code	FSI (CSI/TSI) Activity Budget	Perkins Activity Budget	Early Literacy Success Activity Budget	EIIS Activity Budget	HSS Activity Budget	SIA Activity Budget	Total Activity Budget (autosum)	Last Updated (Autogenerated)
1	Total Budgeted Amounts (Autosum)										\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	07/27/24 4:15 PM
2	Provide Training for staff for meeting the needs of diverse								WRE		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10,000.00	\$10,000.00	04/08/25 12:14 PM
3	Hire Instructional Support for Additional and Intensified								IIT		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$60,000.00	\$60,000.00	04/08/25 12:29 PM
4	Provide Staffing and Materials for Student Affinity Groups								WRE		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$15,000.00	\$15,000.00	04/08/25 12:55 PM
5	Paid Time for District-Wide MTSS Committee								OCG		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10,000.00	\$10,000.00	04/08/25 12:29 PM
6	Training for Science of Reading for Secondary								WRE		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$20,000.00	\$20,000.00	04/08/25 12:29 PM
7	Childcare, staff time, food Superintendent's Advisory Council								OCG		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10,000.00	\$10,000.00	04/08/25 12:55 PM
8	Maintain Intervention Supports								IIT		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$100,000.00	\$100,000.00	04/08/25 12:29 PM
9	Support Outdoor Education Programs and Activities								WRE		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$20,000.00	\$20,000.00	04/08/25 12:29 PM
10	Purchase Additional ELA Core Curriculum								WRE		\$0.00	\$0.00	\$25,000.00	\$0.00	\$0.00	\$0.00	\$25,000.00	04/08/25 12:29 PM
11	Maintain Staffing for ExtraCurricular Activities to Engage								WRE		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$50,000.00	\$50,000.00	04/09/25 10:53 AM
12	Staff to support online education								IIT		\$0.00	\$0.00		\$0.00	\$100,000.00		\$100,000.00	04/09/25 10:53 AM
13	Purchase technology for online program								WRE		\$0.00	\$0.00		\$0.00		\$20,000.00	\$20,000.00	04/09/25 10:53 AM

Needs Assessment Summary

1. Please offer a description of the needs assessment process you engaged in and the summary of results of that needs assessment. Please name the trends noticed through the state and local data review and indicate which data sources were used, including CTE-related information. Explain how the needs assessment and state and local data has informed specific decisions for this plan and budget. (500 words or less)

The Integrated Plan Leadership Team conducted a thorough needs assessment to guide the district's strategic goals and budget decisions. This process involved the district leadership team, including department heads and administrators, who reviewed and analyzed data from various sources to identify themes, trends, and priorities.

The data sources included student information such as graduation rates, 9th-grade on-track rates, participation in Career and Technical Education (CTE), Dual Credit completion, SBAC performance, local formative measures (like iReady), attendance records, and data from the YouthTruth student climate survey. Additionally, focus group listening sessions were conducted with students from affinity groups representing historically marginalized populations, feedback from the Superintendent Advisory Council, Tribal Consultation, and Family Youth-Truth surveys. Staff data was collected from the YouthTruth and Integrated Application Priority surveys, as well as feedback from staff exit interviews. An ORIS Needs Assessment Review was also conducted, involving community members, teachers, parents, administrators, and district leadership.

Several trends were identified through the review of state and local data. There is a need to improve proficiency in 3rd-grade reading and graduation rates for all students, especially those in focal groups. Enhanced support for attendance and coordinated attendance strategies across the district are necessary. The data indicated that maintaining school-based mental health services continued to be a priority for supporting student well-being. Sustaining and expanding educational opportunities, such as CTE, online learning, and dual-credit programs, is crucial. Ongoing professional development for staff, particularly in math and English Language Arts (ELA), is vital for building instructional capacity.

The needs assessment underscored the importance of prioritizing mental health services, instructional supports, attendance strategies, and educational opportunities. These priorities are reflected in the district's plan and budget decisions, ensuring a comprehensive approach to improving student outcomes. We will continue to maintain and improve our Multiple Tiered Systems of Supports for all students in our district and ensure equitable access to a wide variety of educational pathways.

Equity Advanced (250 words or less per question)

1. Explain how you incorporated your equity lens or tool into your planning and budgeting process. Outline key activities/strategies from your outcome/strategies Smartsheet and identify specific activities to support prioritized focal student groups.
For all decisions made by our district and school administrators, we consider the potential disparate impact on our community by reviewing key questions in our equity lens tool. We are going to review this practice with our Leadership staff to ensure that this practice is still happening with fidelity across the district. Intentionally focusing on improving equitable outcomes is essential for all three of our district strategic goals. At individual school sites, we will ensure that equity lens questions are posted in meeting rooms and referred to during school-based decision making. By policy and in practice, we use disaggregated group data in all data-based decision making with an equity lens. Finally, the questions help ensure that the district's actions are in keeping with the intent of the ASD Equity Policy. Important questions around purpose, inequities, negative effects, positive effects, root causes, sustainability, and evaluation provide a framework for basing decisions on removing barriers and ensuring all focal groups have equitable access. For example, we will explore how a decision would reduce disparities and advance equity. How will it affect different groups? Who are our focal groups? Is or can it be adequately funded? How do we measure the effectiveness and share information with all stakeholders? Are there reasons disparities may have occurred, and how can we ensure positive outcomes?
Having the questions posted on Site Council, Board Meeting, Leadership Team agendas will help keep these questions at the forefront of all of our decision-making processes. These questions will also be used in determining the budget items as we do our budgeting process and determining tiered items. One of our outcomes is focused on reducing barriers for stakeholders to increase access and participation to the Superintendent's Advisory Council. Throughout several of our outcomes we

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have strategies that focus on providing equitable access to academic instruction for all students and particularly those in focal groups in grades K-12. These strategies and activities will be focused on core content areas. One of the activities will be focused on small group instruction for students to accelerate their academic success in the core areas. Professional learning for staff in standards-based instruction, differentiation, scaffolding, and acceleration versus remediation will be supported throughout the district.

2. What professional development or training is planned throughout the biennium for teachers, staff, and administrators to address the cultural, social, emotional, and/or academic needs of students, including those of focal students?

All teachers and instructional support staff in the Ashland School District will participate in Science of Reading professional learning throughout the 25-27 biennium. Elementary teachers gained foundational knowledge in the Science of Reading this year and will continue their learning throughout the biennium. Additionally, secondary teachers will gain knowledge in the Science of Reading and how to support students who are reading below grade level. We will continue our work implementing Universal Design for Learning districtwide, ensuring equitable support and access to grade level learning for all learners. Administrators provide consistent feedback on ensuring that our standards are high for all students.

During the 25-27 biennium the Ashland School District will implement a MTSS structure K-12. We have successful MTSS implementation in our elementary schools and are developing the data team and intervention structure at the secondary level. We will implement a K-12 assessment system next year with all students completing diagnostic assessments three times/year in both Language Arts and Math. Data teams and PLCs will analyze student data from these assessments and other formative measures to reflect on instructional practices and determine appropriate supports for students performing below expectations. Teams will review disaggregated data to ensure a focus on supporting students in focal groups.

For teacher-focused professional development, the district has a committee of teacher representatives from each site who support the implementation of all district-led professional development in alignment with the strategic plan. Representatives from this committee administer surveys prior to planning professional development to assess needs and generate ideas to support effective implementation. At the conclusion of any professional development opportunity, data is collected on the success of the professional development and reviewed by this same team. They then use this feedback to improve any future offerings. All professional development is aligned with the district strategic plan. This was developed by reviewing extensive student outcome data, perception data, and

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feedback from multiple focus groups. This was used to identify the needs we needed to address through professional development. Building-based professional development is also aligned to the district strategic plan and is tailored for each building based on their data and needs. These are developed by building site councils.

For district leaders, all new administrators are provided with mentorship and specific training. As administrators progress in their careers, professional development plans are developed individually with their evaluator based on the needs identified. When there is a need identified for all administrators, districtwide training for administrators is done.

3. ☒ What policies and procedures do you implement to ensure inclusion of children and youth navigating houselessness in all programs and activities? ☒

We want to support any students navigating homelessness without any stigma or isolation. We collaborate closely with the Maslow Project and Options of Southern Oregon to provide for personal, family, medical, lodging, and transportation needs. We provide specialized training to our Child Development Specialists (CDS), office managers, and Student Advocates so that they are better able to support these students. We also engage with this constituent group so that we can hear directly from them about their needs and involve them in decision making. We conduct annual trainings with school-level staff to ensure we provide the best wrap-around support for our students experiencing homelessness. We are also part of the McKinney Vento (MKV) consortia in our region, and we meet regularly as a consortium to collaborate on serving students across district boundaries so as to minimize the impact on their academic and social, and emotional well-being. The Director of Student Services monitors the implementation of our policies. Furthermore, we support all staff in the implementation of appropriate accommodations and universal supports for students experiencing homelessness who also have an IEP. The links below are for two school board policies about students experiencing houselessness.

4. ☒ Describe any efforts to ensure opportunities for all students to participate in CTE programs that are generally considered male or female dominated.

Using a systematic approach to creating the Master Schedule of classes helps ensure required and elective access for all students. Course Fees are waived for any student.

CTE teachers have access to IEP accommodation/modification specifics for each student in special education. They also work with our ELD teacher to provide access to instruction while meeting language needs.

We emphasize the importance of providing a variety of experiences and opportunities to students as they make decisions and explore their interests. AHS

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Manufacturing POS is working with the Medford School District to enroll interested students in the “pre-apprenticeship” program that the Medford School District and the Rogue WorkForce partnership have created in support of exposing students to careers in the Manufacturing and Construction Trades. AHS Academic advising works with the SOESD (CTE/SOCTEC and STEM) to ensure that AHS students take advantage of the tours of RCC’s programs (Manufacturing/Health Sciences and Electronics). AHS Pre-Apprenticeship class is offered for students interested in careers associated with Construction & Manufacturing. Students in 12th Grade CCR (College & Career Readiness) receive foundational information about potential careers. The results of individual YouScience Career Inventory is examined by each student with their counselors, health teachers, and CTE professionals. Counselors monitor students and maintain close contact with them to ensure each student will be successful and have access to a variety of activities. As counselors continue to work with students, they pay close attention to what barriers may be inhibiting a student from accessing work-based learning experiences and work to eliminate barriers. (2.13)

Teachers incorporate language, math & basic employability skills where applicable for all students looking to enter any employment opportunity. Data on students registered for CTE POS continue to balance Male/Female ratios and other focal groups in courses related to nontraditional professions. Each of Ashland’s CTE POS offers integrated projects that allow for hands-on learning and applied learning. CTE POS courses increase in difficulty and complexity at the higher levels preparing students for specific skills and strategies needed to succeed in nontraditional fields. Another way AHS Manufacturing POS is preparing CTE participants for non-traditional fields is by working with the Medford School District to enroll interested students in the “pre-apprenticeship” program that the MSD and the Rogue WorkForce partnership is creating in support of exposing students to careers in the Manufacturing and Construction Trades. The AHS Academic advising works with the SOESD (CTE/SOCTEC and STEM) to ensure that AHS students take advantage of the tours of RCC’s programs (Manufacturing/Health Sciences and Electronics). AHS Pre-Apprenticeship class is offered for students interested in careers associated with Construction & Manufacturing. These opportunities ensure CTE participants understand the fields they want to enter after graduation and help them to prepare to be successful.

Well-Rounded Education (250 words or less per question)

The ☒ symbol represents questions that will be pre-populated with the responses from applicants 23-25 Integrated Plan. Applicants will be able to update responses or accept the pre-populated response.

1. Explain any changes or updates to your program review based on the Program Review Tool and Oregon’s Early Literacy Framework.

PRT1 – The district is implementing Wayfinder along with Sources of Strength.

PRT2 – The district is piloting IXL which has similar features to iReady. The district is determining the most effective tool for the district to implement for the 25-26 school year. The district with support from SOESD provided SOR professional learning in August for Instructional Assistants, SPED Teachers, K-5 Elementary Teachers, and Elementary Student Teachers. The district is adopting Core EL and 95% Group as their K-5 ELA Instructional Materials. In August, staff will receive professional learning on both curriculum from the publishers. In the classroom, ECRI and UFLI will be replaced by 95% Group. UFLI will continue to be used by Interventionists.

PRT3 – The new ELA curriculum has more robust oral language, phonological and morphology now goes through fifth grade which it did not in the previous adoption.

PRT5 – The district provided professional learning through fifth grade.

PRT7 – The district will continue using Easy CBM for fluency since other tools don’t have a way to score fluency easily. The district will use the curriculum’s formative assessments. DIBELS will only be used for nonsense word fluency in kindergarten and first grade as part of the dyslexia screening.

PRT8 – No longer using SEEKS. The curriculum has specific routines for student interactions that emphasize oral language. The early grades will have more oral language instruction from the curriculum. The district will continue to work with SOESD to support SOR professional learning.

2. ☒ How do you ensure curriculum design and the adopted curriculum for all content areas (core or basal and supplemental) consist of a clearly stated scope and sequence of K-12 learning objectives and is aligned to all state and national standards? ☒

The school board has adopted an administrative rule on instructional materials selection (see link below). In summary, a curriculum committee is formed which examines available curriculum options recommended by ODE and makes a recommendation to the school board as to which ones should be adopted for each grade span. It is the duty of that committee to ensure that all adopted curriculum is aligned with state and national standards and has a clearly stated scope and sequence. The district instructional coaches play a lead role in this work. Furthermore, the district is now also using its equity lens when examining curriculum options. This lens was used in the recent math curriculum adoption, and it is currently being used in the ELA adoption. In addition, staff has been trained in a two-part series about using the equity lens to evaluate their existing resources and any

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new supplemental resources that they want to add. Additionally, all K-5 staff have been through training in the Science of Reading. The adoption team based its selections on guidance from ODE and rubrics from The Reading League, an independent organization that supports tools and materials aligned to the science of reading.

3. ☒ Describe your system for ensuring classroom instruction is well-rounded, intentional, engaging, and challenging for all students. ☒

We are fortunate to have access to a number of programs that support well-rounded education at all levels.

At the elementary level, this includes music and PE classes for every elementary student, a robust after-school choir program for 3rd-5th graders, an extra-curricular strings program for 5th graders, very active Oregon Battle of the Books teams, K-12 student affinity groups, and a variety of enrichment programs.

At the middle school level, students participate in a variety of electives, including video production, leadership, art and others. Of course, they also have PE, as well as both orchestra and band. There are a number of intramural athletic opportunities, student clubs, and what we refer to as an Individual Needs Class (INC) class that provides course offerings ranging from intervention to enrichment. At the high school, we have robust drama, band, and orchestra offerings. We also have a number of both OSAA and club sports available to students. We have a competitive robotics team and an extensive list of clubs to choose from. We offer yoga and a wellness space to all students. The elective offerings are robust and cover a variety of interests and passions, with everything from business to interior design.

All students (K-12) have access to the district's Ashland Online options for students/families that prefer an online learning option. (2.1)

Ashland's professional development roadmap focuses on Universal Design for Learning, ensuring access for all learners to explicit, research-based literacy instruction as well as continued support in implementing evidence-based math habits of mind to increase equity in every math classroom. This includes teacher leadership cohorts, expert training, and an instructional focus.

Ashland uses a multitude of data points to ensure that all students are receiving the appropriate level of challenge. This is reviewed by teachers utilizing our data dashboard and by school-level data teams. We also administer universal screeners at specific grade levels to identify students who may be intellectually gifted. If a student is in the need of an additional challenge, TAG plans may be developed as appropriate or the universal support of flexible grouping and flex plans at the high school are available to all students, and teachers ensure that those students who require the challenge are engaged with those plans.

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4. ☒ How do you ensure that students, families, and community members experience a safe and welcoming educational environment, including but not limited to being free from drug use, gangs, violence?

We believe that everyone engaged with our schools—students, staff, parents, volunteers, or community members—should feel safe and welcome. The school board adopted the Every Student Belongs policy to set guidelines for creating welcoming educational environments. This policy specifically states that visitors to campus should be free from bias incidents. Interpreters and translation services are available in person or via Linguava for anyone who prefers to communicate in a language other than English. Furthermore, 99% of our staff have been trained in Foundations of Equity, reflecting our district's core value. Equity work is ongoing to fine-tune our responses to the needs of our constituents, ensuring staff are better prepared to welcome community members and partners from diverse backgrounds.

To enhance safety across the district, we've added a School Resource Officer (SRO) based at Ashland High School. Youth advocates at all sites play an instrumental role in ensuring all students are known, supported, and making safe choices. We partner with La Clinica to provide access to mental and physical health supports, addressing the well-being of our students comprehensively.

Our social-emotional and health curriculums focus on core teachings such as purpose, avoiding risky behaviors, and making healthy choices. We have student advocates at every campus, counseling and child development specialists, and most of our campuses have been redesigned with state-of-the-art security systems to ensure a safe environment free from drug use, gangs, and violence.

5. ☒ How do you ensure students have access to strong school library programs? ☒
- Our elementary libraries are staffed by highly skilled and trained educational assistants and overseen by our district elementary media specialist. Students have scheduled time to go to the library in order to address library media standards at the elementary level. They can also access the library during lunch and recess times. At the secondary level, we have staff designated to each library to ensure full-day access for students. Staff is supported by a contracted media specialist.

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6. How are you monitoring the effectiveness of interventions for students who experience depression, anxiety, stress, and challenges with dysregulation?
7. Schools are running regular attendance reports and meeting with counselors and staff to analyze and make any adjustments necessary to meet identified student needs in their intervention plan. Counselors and staff meet regularly to discuss interventions, data tracking and make recommendations to ensure fidelity of implementation. Staff includes a behavioral specialist, behavior analyst, SRO, youth advocates, and mental health & physical health professionals who all work together supporting students. In addition to regular attendance reports and meetings, there could be additional meetings to discuss a behavior plan in place under the direction of a behavioral specialist who works with k-12 students. Some of the additional monitoring systems include a check in/out process set up by student advocates, and mental health interns who work under the supervision of staff supporting students. The district also works with the Care Coordinator in SOESD to help families get connected to community resources.
8. ☒ How do you identify and support the academic needs of students who are not meeting or exceeding state and national standards for focal student groups? What systems are in place for supporting the academic needs of students, including for focal student groups, who have exceeded state and national standards? ☒

Ashland has developed a Multi-Tiered System of Support to ensure that we are meeting the needs of students who are not yet meeting or exceeding the state and national standards. We utilize universal screenings that are reviewed by school-based data teams. This data is desegregated by focal student groups so that patterns can be identified.

We have a wide variety of interventions provided, depending on the instructional need. Classroom teachers are trained to provide specific interventions within their class to address learning gaps. We also have reading and math interventionists who support students with small group, targeted instruction when needed. We have significant support from child development specialists and behavioral specialists to support social-emotional learning and help build support plans when needed. In grades 6-8, all students engage in an individual needs class. This class is targeted to individual students' needs, whether that be instructional intervention or extension opportunities. In grades 9-12, there are specific classes designed to build skills such as Math Lab and Grizzly Academy. There are opportunities for credit retrieval, classes for targeted study skills support, and individual planning to ensure each student is getting what they need. Counselors at the high school run weekly grade reports to ensure students who are failing classes are provided with timely supports.

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We also administer universal screeners at specific grade levels to identify students who may be intellectually gifted. If a student is in the need of an additional challenge, TAG plans may be developed as appropriate, or the universal support of flexible grouping and flex plans at the high school are available to all students, and teachers ensure that those students who require the challenge are engaged with those plans. We employ clustering, single-subject promotion, individualized planning, flex plans, interest-based independent study, acceleration, and a variety of extension opportunities for students who require additional challenges.

In grades K-8, students all participate in an individual needs block. During this time, individual student needs are addressed, whether that be instructional intervention or extension opportunities. For students who are exceeding grade-level standards, this time is used for specific extension opportunities.

9. If planning to develop a new CTE Program of Study, please name the intended program to be started, timeline, and the steps taken or to be taken.

AHS has created and is currently offering courses in Cinema and Digital Video Production for the 2024-25 school year.

10. ☒ What CTE defined work-based learning experiences are available for students? Describe any efforts you are making to expand these opportunities. ☒

We emphasize the importance of providing a variety of experiences and opportunities to students as they make decisions and explore their interests. AHS Manufacturing POS is working with the Medford School District to enroll interested students in the “pre-apprenticeship” program that the MSD and the Rogue WorkForce partnership are creating in support of exposing students to careers in the Manufacturing and Construction Trades. AHS Academic advising works with the SOESD (CTE/SOCTEC and STEM) to ensure that AHS students take advantage of the tours of RCC’s programs (Manufacturing/Health Sciences and Electronics). AHS Pre-Apprenticeship class is offered for students interested in careers associated with Construction & Manufacturing. Students in 12th Grade CCR (College & Career Readiness) receive foundational information about potential careers. The results of individual YouScience Career Inventory is examined by each student with their counselors, health teachers, and CTE professionals. Counselors monitor students and maintain close contact with them to ensure each student will be successful and have access to a variety of activities. As counselors continue to work with

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students, they pay close attention to what barriers may be inhibiting a student from accessing work-based learning experiences and work to eliminate barriers. The Rogue Workforce Partnerships (Director Heather Stafford) met with our school district Superintendents for feedback on how districts would like to engage with Industry as part of their Community Engagement” (10-17-22). Rogue Workforce/CCL will be offering Career Area Sector Partner Zoom meetings, where district planning teams may ask questions and receive feedback from Industry Leaders. Each district is using Industry Sector Partnership Panel Q&A sessions, Superintendent/Sector Partnership discussions at Superintendent meetings, Community Tours of CTE labs, and a strong Advisory Board for each CTE POS. SOESD and SOREDI have created and are holding an ongoing series of CTE Programs of Study classroom tours by members from Industry that are from the Career Areas that match the CTE Programs’ focus area. The first tour of Ashland High School’s CTE Manufacturing labs was held on 2-23-23, where students and CTE teachers were introduced to 28 Industry members from regional manufacturing companies. Future tours will include Digital Media and Culinary CTE Program.

11. ☒ Do your students have the opportunity to earn CTE college credit while in high school? If yes, no explanation required. If no, please explain. ☒
- Each of Ashland’s CTE POS offers integrated projects that allow for hands-on learning and applied learning. CTE POS courses increase in difficulty at the next level. Many times CTE teachers work closely to create articulation and alignment of the CTE POS with local Community College Partners. There are dual credit agreements with our culinary courses, digital photography, business & entrepreneurship and our video production teacher is developing an articulation agreement to offer dual credit in that pathway as well.

Engaged Community (250 words or less per question)

1. What improvements have you made when engaging with your community, including focal students, families, and staff, in the past two years? What barriers, if any, continue to exist or were experienced?
- We strongly believe in the importance of meaningful, authentic, and ongoing community engagement. We have had success in engaging with our community through meetings with constituent groups and general surveys. We created and distributed a family survey for nuanced feedback and rely on regular family nights at

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schools. We have expanded our capacity to provide targeted support for families through Child Development Specialists and student advocates. We use the Smore e-newsletter platform K-12 to reach many families quickly, with features for language and visual accessibility.

We encountered barriers that we will address by making family nights more accessible with food, childcare, and interpretation. For families whose preferred language is not English or Spanish, we will find better communication options. We can share information via social media, as some families don't use technology as much and may miss digital surveys or newsletters. Upon registration, we ask families if they prefer digital or print communication and accommodate their preferences.

This year, we implemented community listening sessions to discuss the district's budget crisis and gain feedback. We launched a Superintendent's Advisory Council with approximately 35 caregivers for direct engagement and feedback on district issues. Our School Board includes four student leaders, and the Superintendent regularly engages with them to understand Ashland High School students' priorities.

2. List the strategies used to engage with focal students and families about the integrated plan throughout the planning process. (At least two strategies are required.)

District leaders met in person with various focal student groups to share a presentation about the grant's purpose and goal as well as the current positions/programs being funded by these sources. Students asked questions during the presentation and then had the opportunity to share which programs were the highest priority for them as well as suggest which programs should be funded at a lower rate to divert funds to a higher priority. They also made suggestions of possible new activities that could be funded with the grants. In collaboration with the student union advisors, we chose to engage with students in their affinity groups during their regular meeting times in order to meet them in their space of comfort and to give them an opportunity to engage in a personal way with the topic in a setting where they were the majority of those present. Even though these activities still fall under the "Consult" level of the community engagement spectrum, we planned the times thoughtfully in order to get robust, meaningful, and authentic feedback. We met with focal student groups in smaller settings in their meeting rooms and on their schedules so that we could make the time more interactive to really hear their questions, provide responses, and get more direction from them based on their lived experiences which may be different than what district leaders assume they need.

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4. List the strategies used to engage with staff, both classified and certified, about the integrated plan throughout the planning process. (At least two strategies are required.)

District leaders conducted budget listening sessions with staff to share information about the grants' goals and current programs/positions supported by the funds. These sessions provided an opportunity for staff to share their priorities and suggest new options. The feedback from these sessions was analyzed and used to inform the district's strategic goals. This strategy falls under the "Involve" level on the spectrum of community engagement, as it maintains regular meetings and ongoing dialogue with staff.

An ORIS assessment was conducted, which included staff representation along with community members and school district representatives. Additionally, the district administered the Integrated Plan Survey to staff, allowing them to provide input on current programs/positions supported by grant funds, prioritize them, and suggest new spending options. The survey was a flexible yet efficient way to gather staff input, providing insightful results. This type of data collection falls under the "Consult" level of the community engagement spectrum.

Outcome of Engagement

11. Looking at your Community Engagement process holistically, what did you learn from the community and staff? Explain how you applied the input to inform your planning. Complete this response when done with the data party/data analysis during leadership.

Through our comprehensive Community Engagement process, we gathered valuable insights from both the community and staff. The high-level results from our Needs Assessment highlighted several key areas that require attention. Firstly, we learned the importance of retaining mental and behavioral health supports, which was a significant concern raised by both staff and community members. Additionally, retaining instructional supports is paramount to address unfinished learning. We also identified the need to increase attendance district-wide. This feedback underscored the importance of equity and inclusion in our planning. Sustaining and increasing educational opportunities, such as Career and Technical Education (CTE), online learning, and dual-credit programs, is crucial. Sustaining opportunities for community engagement was another critical area highlighted by the community. Continued professional learning for staff, particularly in the use of an equity lens, universal design, Science of Reading, engagement strategies, and social-emotional curriculum, is on the list of high needs. Improving communication with all groups about how the school is performing and the resources available to ensure student

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success was another critical area highlighted by the community. Educators expressed the need for more support in using data to inform instruction and continuous improvement.

By incorporating these insights, we have tailored our strategic goals and budget decisions to address these priorities. This holistic approach ensures that we are meeting the needs of our students, staff, and community effectively.

Strengthened Systems and Capacity (250 words or less per question)

1. ☒ What system do you have to recruit, onboard, and retain quality educators and leaders, including those who are representative of student focal groups?

One of our three strategic goals for the district is to identify and implement effective strategies to recruit and retain quality, diverse, and culturally proficient staff. To achieve this goal, we have been partnering with organizations with expertise in this area to evaluate our current practices and make changes where needed. The HR Director has collaborated with the Southern Oregon ESD HR Director to examine each step of the hiring process through our equity lens to find potential barriers to meeting our strategic goals. Some changes have already been implemented. We developed and offer onboarding training with new certified staff and classified staff. We have a robust mentoring program for new teachers that includes a SOESD mentor, a building mentor, and instructional coach. We conduct exit surveys and analyze staff retention data to assess areas of strength and areas needing improvement, including strategies to reduce turnover. We are asking staff to take the Panorama and YouthTruth survey in an effort to get data and feedback that will help us enhance the positive work environment needed to support staff retention.

2. ☒ What systems are in place to ensure that focal students are being taught by effective and highly qualified teachers as frequently as other students? ☒

It is very important for us to have our focal group students receive strong classroom instruction. To that end, we limit the use of teachers teaching subjects that are out of their field. Also, we provide a robust new teacher orientation that includes ongoing mentoring and support. New teachers have three tiers of mentoring support available to them. They have a new teacher mentor from the Southern Oregon ESD, a school mentor at their school site, and access to the district instructional coaches. We want new teachers to feel supported and to have resources to get their questions answered. Instructional coaches can collaborate on lesson planning and problem-solving and even demo a new instructional

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strategy in the teacher's classroom. Even with all of the support we provide new teachers, we try to place more experienced teachers with our students who need the most instructional support.

Furthermore, each school has data teams that look at overall results, results by focal student groups, as well progress of individual students. We have an MTSS (Multi-tiered System of Support) to help teams determine the root causes of any barriers to learning of individual students. It is important for the school to know if attendance or achievement are being affected by issues such as houselessness or whether a student may have an unidentified special education need so that the right type of support can be provided. In this way, students from focal groups who may be struggling will be identified early and can receive on-time support.

3. ☒ Describe your system for analyzing disciplinary referrals, suspensions, and expulsions, including disaggregating this information by focal groups. ☒

Ashland data teams meet monthly which includes looking at discipline data.

Student advocates are actively engaged in these teams along with counselors, child development specialists and the SRO at the HS level. Most of Ashland's schools are PBIS schools which means ongoing data informed practices while decision making to promote school safety and positive behavior. District leadership has looked at data at the beginning of year which included disciplinary data. This opened a robust question session which led to discussions about restorative practices becoming more system wide. The focus was on tying the data to graduation rates and 9th graders being on track. If a specific focal group population is elevating in these data discussions, a district wide review/discussion is done to determine contributing factors and address any changes that need to be made.

4. What systems are in place to support students and families who are transitioning between LTCT sites, YCEPs, and JDEPs to schools?

There are several working parts in our system for supporting students transitioning back into the school setting. Schools hold transition meetings for students and families together with school staff including the counselor, SPED teacher, administrator, youth advocate, etc. At the high school level, the SRO is also involved. A support plan is developed with touch points and consistent, ongoing support. The school will make a referral to the Care Coordinator who collaborates with the family and school team. There are important considerations and decisions made in preplanning the student's individual schedule or special location required, clear communication with teachers about academic supports, and connecting families and

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students with resources as part of the system for smooth transitions. Often these students are on an IEP or a 504 who need all the support we can provide.

5. ☒ How do you support students and families in the transition between early childhood education programs and local elementary school programs from elementary to middle grades? From middle grade to high school? From high school to postsecondary education and/or workforce? ☒

Ashland partners with early learning preschool programs through professional development and scheduled transition activities to ensure a smooth transition for incoming kindergarten students. There are multiple open houses and orientation activities for kindergarten students and their families each spring. For students requiring special education services, transition meetings are held to develop individualized plans. We have a soft start for all kindergarten students, allowing individual time with the teacher to build relationships and comfort prior to the first day of school.

Elementary to Middle School: All fifth graders visit the middle school to meet with student leaders and staff, tour the AMS campus, and learn about connection opportunities. AMS staff and fifth-grade teachers share knowledge of the incoming 6th-grade cohort. Multiple events such as orientation, open house, and onboarding opportunities occur for students and families.

Middle School to High School: Transition activities begin in kindergarten with lessons on careers and continue up to graduation. Beginning in the spring of 8th grade, there are high school tours, a parent orientation night, and Fresh Start, an overnight community-building opportunity for incoming 9th graders. All 8th-grade classes visit AHS for forecasting and personalized education planning. Joint CST meetings support students during the transition.

High to Post-Secondary: Our Grizz Academy provides support for career interests and career-related learning. We develop an individual four-year plan. ASPIRE, Project Youth, and College Dreams are part of our system. Students develop a 4-year relationship with their school counselor. We host an annual career day, offer dual-credit and advanced courses, and provide assistance with college

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applications, scholarships, and awards. We have a full-time college-career counselor and provide a College-Career Readiness class for seniors.

6. ☒ What career exploration and career development coursework and activities are offered to support awareness, exploration, preparation, and training at the various grade-bands? Describe your system for sharing information with students and parents regarding career connected learning and CTE opportunities, including any guidance, counseling, and connections to education plans and profiles. ☒

AHS students participate in “Project Impact”, exploring Pre-Apprenticeships with the Medford School District. 28 AHS students visited ten different Industry jobsites this year, learning about Manufacturing and Construction trades. The Ashland Theatre Arts CTE Program offers internships with Industry professionals from the Oregon Shakespearean Festival. The Ashland High School “student bank”, in partnership with Rogue Federal Credit Union, provides CTE Business/Marketing students the opportunity to “earn and learn” about the banking industry. The CTE Digital Design and Media Program designs, creates, and sells products for school staff, community members, and local businesses. Rogue Community College supports AHS students in career guidance, degree options, and Dual Credits within the AHS CTE Programs.

Students self-select courses based on their interests and strengths, shared with families to ensure focal groups are well informed. Incoming 9th Grade Students and parents receive Parent Campus & Program Tours, and the CTE specific Video is presented to all incoming 9th grade students. In 2023, we added the Elective Showcase at Ashland Middle School with a focus on representation from focal groups. All teachers completed a 3 Day SCIP Training during August In-service. We have an in-house Spanish interpreter/translator for parent meetings and access to Language Line for other languages. Written communication is done via Smore, allowing recipients to select their preferred language.

7. *For districts required to engage in Tribal Consultation only:* Describe the professional development opportunities provided to ensure that teachers and other school professionals who are new to the Indian community are prepared to work with Indian children and that

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all teachers who will be involved in programs under this guidance have been properly trained to carry out such programs.

We try to train all teachers in SB13 (Tribal History Shared History) as a district wide requirement. We are working with SOESD to identify teachers who have not been trained. We offer EDI training during district wide EDI day (certified and classified). There are other ongoing offerings as well. Our intention is for more involvement with NASUs across sites building connections and relationships. SOESD offers a Canvas course on the Tribal Consultation Toolkit.

Early Literacy Inventory and Prioritization

For the purposes of prioritizing Early Literacy funds, we have used multiple sources of data, including but not limited to state Language Arts summative assessment data and, for eligible applicants who serve English Language Learners, English Language Proficiency Assessment data.

Feedback (250 words or less per question)

1. How can ODE support your continuous improvement process?

Provide adequate funds to ESD's. The support they offer districts in our region is critical.

Find ways to streamline/reduce application and reporting requirements for the Integrated Programs Plan.

Email responses from ODE are helpful, but having a chance to zoom with ODE staff is even better.

Create a virtual onboarding avenue for people new to the Integrated Programs Plan process; it's a lot.

Continue to host regional work/informational sessions to hear from ODE staff directly and connect with people from nearby school districts.

Provide additional funding within the IPP funding streams to support all of the application drafting and reporting requirements which could include using these additional funds to pay for some FTE to do the IPP reporting work.

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Plan Summary

1. Provide an overview of the plan detailing the key aspects and rationale behind the chosen approach. Describe the vision of the plan and how it addresses strengths and areas for growth identified in the needs assessment, including those specifically related to CTE. Additionally, describe how the plan will work towards addressing the co-developed LPGTs or Local Optional Metrics. (500 words or less)

Recognizing the importance of ongoing monitoring and communication of progress toward outcomes and Longitudinal Performance Growth Targets, we have established robust processes to ensure continuous evaluation and adjustment of our strategies and activities. We will continue providing behavioral/mental health supports at school while focusing on expanding equitable access to educational opportunities. We are excited about ELA curriculum adoption/work/development providing top-tier instruction in Reading/ELA which will support reaching our 3rd grade ELA proficiency target. Our data indicated more support is needed for chronically absent students; thus we created an addition to the student advocate team supporting positive attendance and help the district meet our regular attenders growth target. We recognize the importance of adults in classrooms serving students; thus we continue funding instructional positions ensuring students are served by highly qualified/trained adults providing timely/relevant instruction supporting progress/acceleration for those needing intervention.

Monitoring progress toward these outcomes and targets will be accomplished through common strategies/activities across all outcomes: tools assisting educators/school leaders interpreting data making informed decisions; partnering with families supporting student learning/providing regular feedback; updating administrator evaluation system; investing in professional learning improving practices related to specific strategies. Monitoring will also take place in the Board Room as we regularly report on progress related to outcomes and Longitudinal Performance Growth Targets. We will continue maintaining/improving Multiple Tiered Systems of Supports for all students ensuring equitable access to a wide variety of educational pathways.

Links

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1. ☒ Outcomes and Strategies ☒
2. Integrated Planning and Budget Year 1 (2025-2026 and 2026-2027)
3. Tiered Planning
4. ☒ Early Literacy Inventory ☒
5. Early Literacy Allowable Use Descriptions

Attachments

1. [Equity lens utilized](#)
- ~~2. Community engagement artifacts~~
3. Board meeting minutes which expressly state the plan presentation to the governing board, with an opportunity for public comment, and formal approval by the board (non-consent agenda item)
- ~~4. Optional Perkins Needs Assessment Documentation~~
- ~~5. Direct Perkins Recipients Only Perkins Improvement Plan (if applicable)~~
6. Affirmation of Tribal Consultation - For affected school districts required to engage in Tribal Consultation (Refer to Section 2 for more details)
7. Tribal Consultation Worksheet- - For affected school districts required to engage in Tribal Consultation (Refer to Section 2 for more details)
- ~~8. District Charter Program Agreement (DCPA), if applicable~~
9. Memorandum of Understanding (MOU), if applicable

Assurances

1. You will comply with all applicable state and federal civil rights laws, to the effect that no person shall be excluded from participation in, be denied benefits of, or otherwise be subject to discrimination under any program or activity on the basis of race, color, national origin, sex, sexual orientation, marital status, gender identity, religion, age, or disability.
2. You have taken into consideration the Quality Education Commission (QEC).
3. Your proposed expenditures comply with supplement (not supplant) guidance outlined in statute for Federal School Improvement, Perkins, and HSS district/school activities (if applicable).

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4. Your student progress and outcome data disaggregated by focal student group (except in cases of fewer than 10 students) was examined during the integrated planning process.
5. Dropout/pushout prevention strategies and activities are applied at every high school within the district, including alternative schools.
6. Each of the SSA plans were reviewed as part of your strategic planning.
7. You have reviewed your early literacy programs to identify areas of alignment with Oregon's Early Literacy Framework: A Strong Foundation for Readers and Writers (K-5) and the applicant's work will align with the definitions included in the Early Literacy Success Initiative.
8. Your literacy assessments, tools, curricula and digital resources are culturally responsive, research-aligned, and reflected in the inventory, including formative and diagnostic tools.
9. You will provide professional development and coaching in research-aligned literacy strategies to teachers and administrators in early elementary grades to improve early literacy instruction.
10. You will provide extended learning programs that use research-aligned literacy strategies to students in early elementary grades by licensed teachers or by qualified tutors.
11. You will provide high-dosage tutoring to students in early elementary grades that integrates reading and writing and that is delivered by a qualified tutor using developmentally appropriate practices.
12. You have a student growth assessment for literacy that produces data that can be disaggregated by focal student group.
13. If literacy funds are used to are used to hire specialists, interventionists, or coaches, they have a literacy-focused licensure endorsement, have advanced training or certification in "research-aligned literacy strategies" and "the science of reading and writing", and their primary role and responsibilities include direct support of students and/or educators.
14. You have, for the purposes of prioritization, determined rates of proficiency using multiple sources of data, including state Language Arts summative assessment data and, for eligible applicants who serve English Language Learners, English Language Proficiency Assessment data.

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INSTRUCTIONS FOR SCHOOL/DISTRICT

This template deck is a resource for applicants to turn and adapt and use in presenting their Integrated Application as covered under, [Aligning for Student Success: Integrated Guidance 2025-27](#).

This resource is designed for governing boards but could, often with translation, be used for communicating to families and the communities served.

Questions?

Contact your ESD Liaison or email ODE.EI@ode.oregon.gov

Ashland School District



2025-27 Integrated Application Presentation to Governing Board

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Contents

- Purpose of Presentation
- Background & Context
- Planning Team
- Plan Inputs
- Plan Overview
- What's Next

Purpose for Presentation

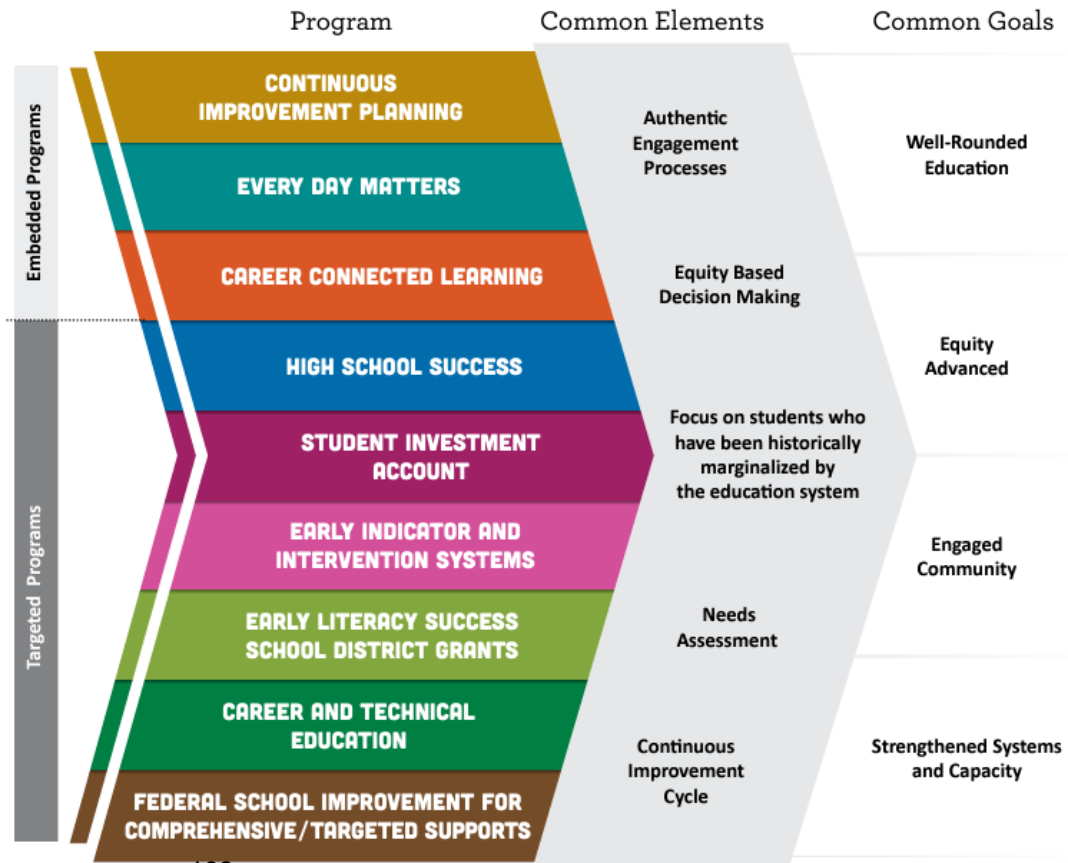
- To share what was prioritized in the plan given the range of inputs
- To explain how the plan was developed
- To hear additional feedback on the plan now that it has been developed
- To seek board approval



Background

- Integration effort was responsive to requests from educational leaders and state legislators
- Combined processes for community engagement, needs assessment, planning, budgeting and evaluation for nine programs
- Designed to reduce burden and redundancies and improve the framework by which progress can be measured over time

Aligned Programs & Common Goals



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Summary of Program Purpose

Centering supports from kindergarten readiness through college & career and especially for focal group students.

Continuous Improvement Planning (CIP) - A process involving educator collaboration, data analysis, professional learning and reflection - toward improved outcomes for students and especially students experiencing disparity.

Every Day Matters - (EDM) - Embedded across the five other programs, focusing attention on student engagement, school culture, climate/safety & culturally sustaining pedagogy.

Career Connected Learning (CCL) - Framework of career awareness, exploration, preparation, and training that is both learner-relevant and directly linked to professional and industry-based expectations.

Summary of Program Purpose, continued

Centering supports from kindergarten readiness through college & career and especially for students who have experienced disparities.

High School Success (HSS) - Systems to improve graduation rates and college/career readiness.

Student Investment Account (SIA) - To meet students' mental health, behavioral needs and increase academic achievement/reduce disparities for student focal groups.

Early Indicator and Intervention System (EIS) - The development of a data collection and analysis system, in which educators collaborate, to identify supports for students.

Summary of Program Purpose, continued

Centering supports from kindergarten readiness through college & career and especially for students who have experienced disparities.

Early Literacy Success School District Grants (ELGSSG) - Grants to school districts in order to Increase early literacy for children from birth to third grade, reduce literacy academic disparities for student groups that have historically experienced academic disparities, increase support to parents and guardians around literacy, and to increase access to early literacy learning through support that is research-aligned, culturally responsive, student-centered and family-centered.

Career and Technical Education - Perkins V (CTE) - Improving access and participation in education and training programs that prepare learners for high-wage, high-skill, in-demand careers.

Federal School Improvement - Address the academic disparities for named focal student groups and subject areas at schools identified as Comprehensive Support and Improvement (CSI) and Targeted Support and Improvement (TSI).

Meet our Planning Team Members

Ericka Beck-Brattin, Grant Coordinator

Michelle Cuddeback, Assistant Superintendent

Joseph Hattrick, Superintendent

Christine McCollum, Early Literacy Grant Coordinator

Rebecca Gyarmathy, Assistant Principal Ashland Middle School

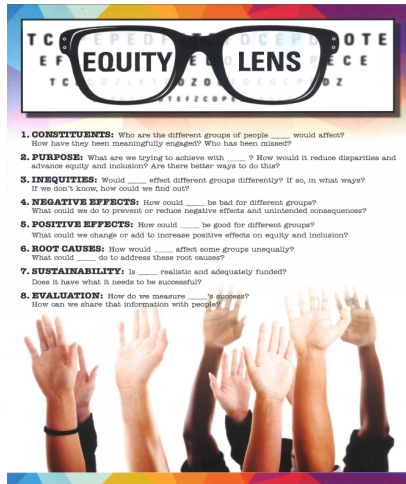
Sherry Ely, Director of Business Services

Lead Team, District Administrators and Department Heads

ORIS Review, Team Community Members, Staff, Administrators

Equity Lens and Tools Used in the Decision Making Process

- Oregon Equity Lens
- ORIS Oregon Integrated Systems Framework



District Level Systems Health Needs Assessment

Version 1.0
Updated May 2019



Community Engagement Highlights



Rich Variety of Community Engagement Data

- Staff
- Community and Family
- Student
- Academic

High Family Response Rate to Survey

Intentional in Focal Group Engagement

Needs Assessment Highlights



Community Engagement Data

ORIS Needs Assessment

- Routines and Structures
- Professional Learning
- Well-Rounded, Coordinated Learning Principles

Lead Team Analyzed and Elevated Trends and Themes to Determine Priorities

These priorities emerged:

Retain Mental and Behavioral Health Supports

Retain Instructional Supports

Increase Attendance District-Wide

Sustain and Increase Educational Opportunities

Sustain Opportunities for Community Engagement

Ongoing Professional Learning for Staff

Our intended outcomes are:

Increase proficiency in 3rd grade reading for all students and students in focal groups to 68% by 2028.

Increase graduation rates for all students and students in focal groups to 95% by 2028.

Increase the number of students prepared for postsecondary success

Increase the rate that students, staff, and families report experiencing a safe, welcoming, supportive, and inclusive environment

These key strategies will help us achieve our intended outcomes:

- Provide equitable access to social, behavioral, and mental health supports for students in grades K-12
- Increase student, family, and community awareness of educational opportunities and programs offered within ASD.
- Strengthen collaboration with regional partners who represent or serve underserved populations through partnerships, trainings, and college and career exploration
- Provide high-quality, research-based professional development for staff to better understand and support all students, with particular attention to students who have ²⁰²currently and historically been underserved.

Key Investments:

Behavioral and Mental Health Supports- 25/26 SY:\$500,000 26/27 SY: \$550,000

- Retain Youth Advocates
- Provide Behavioral Health Supports
 - Behavioral Health Specialist
 - Child Development Specialists
 - Secondary Counselor(s)

Key Investments:

Retain Instructional Supports 25/26 SY: \$1,800,000, 26/27 SY: \$2,100,000

- Retain ELD Teacher(s)
- Implementation Specialist
- Retain Secondary Counselor(s)
- Retain Instructional Staffing
 - Retain Instructional and Data Coach(s)
 - Retain Intervention Teachers(s)
 - Retain Instructional Support Staff

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Key Investments:

Increase Attendance District-Wide 25/26 SY: \$70,000 and 26/27 SY: \$75,000

- Hire Attendance Advocate
- Retain Secondary Counselor(s)
- Project Youth+

Sustain and Increase Educational Opportunities 25/26 SY: \$775,000 and 26/27 SY: \$825,000

- Provide Online Instructional Support
- Provide Various Educational Opportunities
- Project Youth+

Sustain Opportunities for Community Engagement 25/26 SY: \$8,000 and 26/27 SY: \$8,000

- Implementation Specialist
- Provide access to Community Engagement Activities

Ongoing Professional Learning for Staff 25/26 SY: \$30,000 and 26/27 SY: \$60,000

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Our Plan - Tiered Approach

Tiers of Planning & Budgeting allow for nimble course changes that have been pre-considered but aren't within the current budget parameters.

In our district, these additional strategies and activities are possible if we move to another tier in our plan: additional training in Science of Reading for Secondary, additional supports for Affinity groups, additional professional development and additional instructional supports

How the State Understands Success

There are distinct performance measures used in the monitoring and evaluation process for implementation under this integrated guidance:

1. High School Success Eligibility Requirements
2. State CTE Perkins Performance Targets
3. Federal School Improvement Accountability Data
4. Longitudinal Performance Growth Targets (LPGTs)
5. Local Optional Metrics (LOMs)

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6. Progress Markers

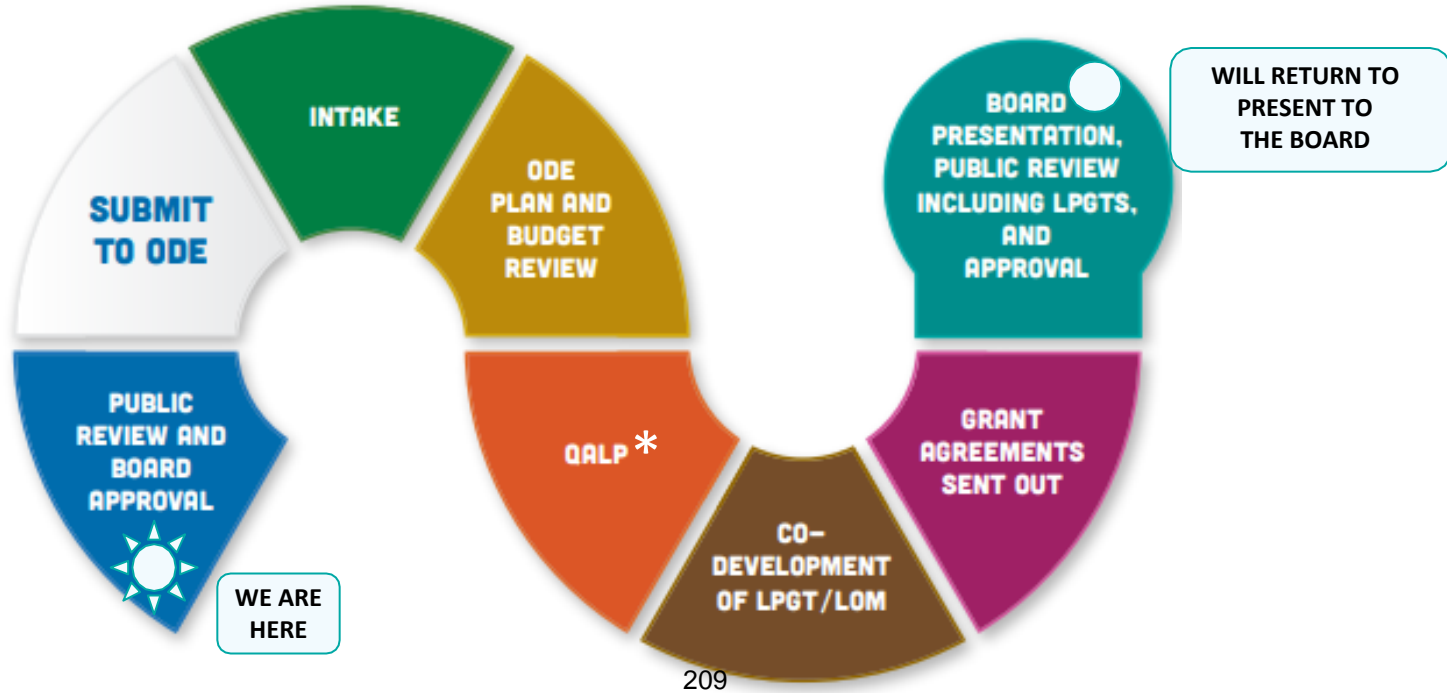
Longitudinal Performance Growth Targets (LPGTs)

ODE will co-develop Longitudinal Performance Growth Targets with grant recipients, based on:

- Data available for longitudinal analysis;
- Guidance established by the department; and
- Overall and disaggregated rates for the following metrics:
 - Third-grade reading proficiency rates measured by ELA
 - Ninth-grade on-track rates
 - Regular attendance rates
 - Four-year or on-time graduation rates
 - Five-year completion rates

*Grantees may also set local optional metrics

What Happens Next?



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Questions & Comments



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