



EXECUTIVE SUMMARY

Meeting Date:	July 1, 2025
Agenda Item:	Annual Designations for 2025-26 School Year
Item Type:	Action
Administrator:	Brad Earl
Objective:	Approve the annual designations for the 2025-2026 school year

Background: There are a number of designations required or recommended as part of the organizational plan. In election years, that meeting must occur no later than the last day of July. (ORS 332.040 and 255.335(5)). The list below provides details for the annual designations that must be approved by the Board. There are no recommended changes from last year.

Board Organizational Meeting Historical and Other Information:

Legal Counsel

General Counsel – TGP Law, P.C.

TGP Law, P.C., located in Medford, Oregon, has been the school district's general legal counsel since 2019. Thaddeus (Thad) G. Pauck is the owner of TGP Law, P.C.

TGP Law has notified the district that he will no longer be providing services for the school district, once the District finds a replacement. We are in the process of drafting an RFP to hire a General Counsel and will work closely with the Board throughout the process.

Legal Services for Special Education Matters – The Hungerford Law Firm

The Hungerford Law Firm, located in Oregon City, Oregon, has provided legal guidance to the Medford School District on matters involving special education services since approximately 1998. Richard Cohn-Lee and Joel Hungerford are the two attorneys at the firm who represent the Medford School District on matters of this nature.

Employment and Labor Attorney – Garrett, Hemann, Robertson P.C.

Garrett, Hemann, Roberson P.C., located in Salem, Oregon, has provided the school district with legal services in the area of employment and labor law, and human resource consultation since January of 2013. A Request for Proposal process was used to select Garrett, Hemann at that time. We interviewed multiple firms for these services again in 2022 and selected Rebekah R. Jacobson to represent the district on employment and labor matters.

The District may also utilize Garrett, Hemann, Robertson P.C. for other legal services not limited to just employment matters during the transition from TGP Law to a newly selected General Counsel.

Bond Counsel – Foster Garvey PC

The District has been working with Courtney Dausz, Principal, for nearly the entirety of her 20-year career as a public finance attorney. She has focused her practice on helping cities, counties, school districts, special districts and conduit borrowers navigate a wide variety of financing matters. Courtney was previously with Mersereau, Shannon LLP until the firm was closed upon the retirement of its sole remaining partner, Jim Shannon.

Financial Auditors

Pauly, Rogers and Co., P.C., located in Tigard, Oregon, has been providing auditing services for the Medford School District for many years. The district conducted a Request for Proposal process in January of 2013 and selected Pauly, Rogers to continue to provide auditing services for the district. Kenny Allen, CPA, CFE is the Partner In Charge for the services provided for the district. Pauly, Rogers and Co. is expert in K-12 accounting.

Depositories for School Funds

Treasury Management Services (Primary Bank) – U. S. Bank

The Medford School District began using U. S. Bank for purchase card services in the 2013-14 school year. In 2018, the district transitioned all banking services to U. S. Bank through a permissive cooperative procurement process set forth in the terms of the City of Salem's contract with U. S. Bank. The district and individual schools utilize their branch banking services for daily deposits and cash needs.

Local Government Investment Pool (LGIP) – Oregon State Treasury

The Local Government Investment Pool (LGIP) is an open-ended, no-load diversified portfolio offered to eligible participants, including school districts. The pool is commingled with state funds in the Oregon Short Term Fund. The Treasury department manages the investment of the pool and the district receives favorable investment returns and liquidity. The majority of the district's funds are held in the LGIP account throughout most of the year.

Deposit Account – People's Bank of Commerce

The district desires to keep an active account at a local bank to provide diversification and liquidity as needed. The Medford School District began using People's Bank of Commerce in 2018. The district keeps roughly the equivalent of one payroll cycle on deposit at People's Bank and they are currently matching the interest rate obtained on the LGIP account. This amount may vary depending on the bank's need for deposits.

Comprehensive Insurance Coverage

Property & Casualty for Education (PACE) – Insurance Carrier

The district purchases insurance through PACE, which is the largest property and liability risk pool of school entities in the state, serving more than 200 education organizations. The district has extensive coverage for Educators Liability, Auto, Property, Earthquake, Flood, Equipment

Breakdown/Boiler and Machinery, Crime, Cyber Liability and now School Violent Acts Coverage. The District selected Brown & Brown as its liability insurance agent through an RFP process conducted in 2025.

Additional Materials: None

Recommendation: Consider approving the annual designations.

Suggested Motion: *“I move to approve the Annual Designations for the 2025-26 school year as presented.”*