

**MINUTES OF BUDGET COMMITTEE MEETING**  
**EUGENE SCHOOL DISTRICT 4J, LANE COUNTY, OREGON**

**Date: April 22, 2026**

The Budget Committee of School District No. 4J, Lane County, Eugene, Oregon, held a regular Budget Committee meeting at 6:00 p.m. in-person at the Education Center, 200 North Monroe Street in Eugene, Oregon, via live-stream and broadcast on KRVM. Notice of the meeting was emailed to the media and posted on the 4J website.

**ROLL CALL**

**BUDGET COMMITTEE MEMBERS PRESENT:**

Abbie Stillie  
David Wallace  
Courtney Salic  
Scott Fellman  
Eric Richardson  
Amy Fellows

**BOARD MEMBERS PRESENT:**

Tom Di Liberto  
Ericka Thessen  
Maya Rabasa  
Jenny Jonak  
Morgan Munro  
Judy Newman  
Rick Hamilton

**STAFF:**

Miriam Mickelson, Superintendent  
Carmen Xiomara Urbina, Chief of Staff  
Matt Brown, Director of Financial Services  
Bob Blyth, Associate Director of Financial Services  
Jeff Johnson, Director of Elementary Education  
Kelly McIver, Communications Director  
Ryan Spain, Director of Facilities  
Steve Schininger, Network Services Manager  
Jill Cuadros, Director of Nutrition Services  
Kara Mayer, Food Services Coordinator  
Lake Liebenberg-Battles, Senior Financial Analyst

Oscar Loureiro, Director of Research and Planning  
Christine Nesbit, General Counsel  
Seth Pfaefflin, Director of Student Services  
Kate Marrone, Director of Human Resources  
Brooke Wagner, Assistant Superintendent for Administrative Services  
Lisa Fjordbeck, Operations Coordinator for the Superintendent's Office

**EMPLOYEE ASSOCIATIONS:**

Lisa Jenkins-Easton, Oregon School Employees Association (OSEA) President  
Jamie Myers, Eugene Education Association (EEA) President  
David Wines, Eugene Education Association (EEA) Vice President

**MEDIA:**

KRVM  
KEZI  
Lookout Eugene-Springfield

**I. CALL TO ORDER/ROLL CALL**

Chair Salic called the Eugene School District 4J Budget Committee meeting to order at 6:04 p.m. She said the names of all members present.

**II. BUDGET COMMITTEE CHAIR AND SUPERINTENDENT WELCOME**

Chair Salic welcomed attendees to the Budget Committee meeting, provided a brief opening statement, and presented an overview of the meeting agenda.

Superintendent Mickelson thanked Budget Committee members for their service during a time of significant budgetary pressure. She clarified the roles and responsibilities of committee members: 1) Setting tax rates 2) Establishing appropriation levels and 3) Ensuring that the proposed budget aligns with district values.

She acknowledged that when district leadership identified an additional deficit of \$16.4 million on top of the initially communicated \$30 million, they worked hard to stay aligned with the district's commitment to minimize impacts to students, classrooms, and direct student-facing services. As a result, they focused additional reductions in Phase 2 on non-student facing services and district-level supports. She added that the district engaged with external partners, namely the Oregon Association of School Business Officials (OASBO), to review the district's 2026-27 projections. She said they confirmed that the projections are within a reasonable range.

Ms. Rabasa disclosed a potential conflict of interest.

**III. ITEMS RAISED BY AUDIENCE**

Jordan Zeigler, 4J educator, provided comments related to the district budget. She said she recently received a notification that her teaching position is being moved from one

elementary school to another and that the program she coaches, Girls on the Run, is being discontinued. She provided information about the program and its success. Ms. Zeigler urged caution when moving personnel from building to building and taking personal preferences seriously.

Keith Caldera, 4J parent, spoke about the district budget. He said the latest round of budget cuts impacted the educator who also leads the theatre program at South Eugene High School. He praised the educator and said without his leadership the program will end come next school year. He challenged the decision and urged finding a resolution.

Katrina Allen, 4J educator, provided comments related to the district budget. She said that elementary music, physical education, and educators in library services will be impacted.

She described the challenges she personally experienced having an itinerant position in the district and pushed back against the decision to cut Teachers on Special Assignments (TOSAs). She urged taking a hard look at the vastly different FTE.

Amanda Brookshear, 4J counselor/TOSA, spoke about the district budget, specifically highlighting impacts to the school counselor program. She reported that 12 FTE counselor positions are being cut. She said prior districtwide communications placed an emphasis on protecting special education, behavior, and mental health supports. She said Oregon Division 22 requires districts to implement a comprehensive school counseling program ensuring that all students have access to universal supports, targeted interventions, and individual services. Ms. Brookshear said the proposed shift undermines the district's inability to meet those requirements. She listed averages of statewide counselor-to-student ratios.

Deborah Miller, 4J counselor, provided comments about the district budget, specifically highlighting impacts to the school counselor program. She described the high demands of an average day in her position as a school counselor. She said her position is being reduced to halftime and she is uncertain how she will provide comprehensive counseling to meet the social and emotional needs of students.

Megan Purdue, 4J music educator, spoke about the district budget, specifically emphasizing the positive impact of music education on school community and culture and its alignment with Oregon's high school success act and integrated guidance framework. She challenged impacts to music educators and urged preserving music classrooms, inviting music teacher narratives, involving administrators in placement decisions, and considering how music teachers can serve their communities beyond the music room.

Melissa Nixon, 4J music educator, provided comments. She listed three decisions that she believes have negatively impacted access for students: 1) the closure of Corridor Elementary School 2) the unsuccessful rollout of an elementary level Life Skills class 3) the use of one-time ESSER funds to create salaried positions 4) Assistant Principal positions remaining unchanged until current budget cycle 5) Wells Fargo building purchase 6) the district absorbing costs typically covered by the federal government 7) reported spending of \$5 million annually outside of the approved budget 8) Edgewood Elementary School staffing allocations not matching budget. She asked: Who is approving these costly decisions? How will the district prevent these from happening again? Who is being held accountable? She urged accountability and change.

Dave Wines, Eugene Education Association (EEA) Vice President, spoke about the district budget, specifically highlighting impacts to CALCI, elective choice, counseling, behavior supports, literary supports, physical education, music, Nutrition Services, online options, and theater. Mr. Wines recognized educator Michelle Dunn for her contributions to adaptive physical education.

Josiah Mckinley, 4J student, provided comments about budget cuts. Regarding impacts to the music program at North Eugene High School, he reported that their band teacher will be reduced to a half time position. He said the music program is a pillar in their school community. Mr. Mckinley recommended looking at other programs and reconsidering cuts to the music program.

#### **IV. ITEMS RAISED BY EMPLOYEE GROUPS**

Eugene Education Association (EEA) President Jamie Myers spoke about the district budget. She said EEA members are currently waiting for reassignment, being laid off, and for more information. She cited fear, worry, and loss of trust in light of budgetary reductions. She said there remains serious unanswered questions about the additional \$16.4 million budget deficit. She challenged budgetary oversight. She said the latest shortfall has eroded the trust for EEA members.

Oregon School Employees Association (OSEA) Chapter 1 President Lisa Jenkins-Easton provided comments. She said classified work and assigned tasks must remain with classified staff. She remarked that there are Managers, Administrators, Professionals, and Supervisors (MAPS) staff asserting their relevance at the cost of previously well-trained and experienced members; and that she is investigating multiple instances where classified work has been assigned or reassigned to MAPS employees. Regarding the Nutrition Services Department, she highlighted considerable impacts to food availability.

She provided a handout for reference.

**V. ITEMS FOR ACTION AT THIS MEETING**

**1. APPROVE MEETING MINUTES FROM APRIL 8, 2026 BUDGET COMMITTEE MEETING**

Ms. Munro noted a name spelling error on page 12.

**MOTION:** Vice Chair Stillie moved to approve the amended meeting minutes from the April 8, 2026 Budget Committee meeting. Ms. Newman seconded. **The motion passed unanimously 13:0:0; Chair Salic, Vice Chair Stillie, Mr. Richardson, Mr. Fellman, Mr. Wallace, Ms. Fellows, Ms. Rabasa, Ms. Jonak, Ms. Munro, Ms. Newman, Ms. Thessen, Mr. Di Liberto, and Mr. Hamilton all voting in favor.**

**VI. REVIEW PREVIOUS MEETING TOPICS AND UPDATES**

Superintendent Mickelson opened a discussion involving previous meeting questions and updates, as follows:

1. Estimated costs of unfunded mandates
2. FTE and scope of reductions for 2026-27
  - a. General information
  - b. Nutrition Services
3. Nonprofit and entrepreneurial opportunities
4. Furlough days
5. Looking at 2027-28 and scenarios
6. General Fund budget update
  - a. High cost disability
  - b. State School Fund
7. History and current deficit forecasting
8. Filling the gap for 2026-27

Chief of Staff Carmen Xiomara Urbina presented information on the financial impact of unfunded mandates via PowerPoint presentation. A hard copy report was provided to Budget Committee members.

What we know

- Requirements are real, ongoing, and increasing
- Costs span staffing, systems, training, and compliance
- Many mandates are only partially funded

The challenge of quantification

- Embedded costs across multiple systems

- Integrated work into existing roles
- Overlapping and evolving requirements
- Includes indirect strain

#### What this means

- Examples shared are representative, not exhaustive
- Full impact is greater than what can be isolated line-by-line

#### What's happening

- Federal, state, and local mandates continue to expand. These requirements are not optional.

#### The pattern

- Funding is partial or inconsistent
- Costs are real and recurring
- Gaps are absorbed locally

#### What this means

- General Fund used to backfill required work
- Reduced flexibility
- Ongoing structural pressure on the budget
- Mandates are required, funding is not

Ms. Urbina provided examples of structural pressure on 4J's budget: Special Education (IDEA), ESSA and SB 141 assessment and accountability, and expanding state mandates (SB 819: documentation and compliance, SB 141: assessment and alignment, SB 3: graduation requirements (finance/career), and cross-department coordination).

She outlined Division 22 – Scope of Required Work:

*\*Finer details were provided in the PowerPoint presentation*

- Instruction and programs
- Health and safety
- Assessment and accountability
- Equity and access
- Special education
- Equity and access
- Staffing and professional
- Reporting and audits

Human Resources Director Kate Marrone and Assistant Superintendent for Administrative Services Brooke Wagner provided further information relating to staff reductions of up to 269 FTE.

Ms. Marrone clarified that impact notices have been disseminated through employee groups, but notices do not necessarily equate to a layoff – the position has been identified for a potential cut, change in location, or reduction. Direct student services were protected to the greatest extent possible.

#### Elementary Service Prioritization

- Maintained service levels at all elementary schools; SSC, counselor, BBSA, music, PE, and library
- Staffing adjustments aligned with enrollment shifts

#### Special Education (SPED)

- No reductions at the building level. Services redistributed based on specific student needs

#### Section Realignment

- Class sections realigned to reflect enrollment needs, directly correlating to PE, music, and library availability

#### English Language Dev. (ELD)

- Services redistributed based on student need, resulting in a slight overall reduction

Ms. Wagner displayed a table displaying FTE and Scope of Reductions:

*\*Finer details were provided in the PowerPoint presentation. FTE represents positions – not individual people.*

- Licensed – percent of group reductions: 13%
- Classified – percent of group reductions: 8.7%
- Non-bargaining – percent of group reductions: 18.2%
- Executive – percent of group reductions: 50%

Ms. Wagner invited Nutrition Services Director Jill Cuadros and Food Service Coordinator Kara Mayer to speak about impacts to the Nutrition Services Department. She noted that a workgroup was convened to review the current nutritional program and to determine what adjustments would be required to align with the funding level provided.

Ms. Cuadros said the workgroup reached a shared understanding and developed recommendations to align with current conditions to ensure long-term sustainability. She outlined the following:

#### What is changing and why:

- Closure of on-site kitchens at smaller schools and central kitchen-catering
- Reduction of scratch cooking to standard heat-and-serve menu

- Elimination of all-you-care-to-eat-model
  - First serving of breakfast and lunch remains free for students

#### Why these changes:

- Current model exceeds available resources and reimbursement levels
- Rising labor, food, and infrastructure costs require general fund support
- Aligning operations to Phase 2 budget reductions

Ms. Mayer highlighted food insecurity, financial burdens on families, and risks to students resulting from budgetary constraints. She provided a visual representation of a school breakfast this school year compared with next school year, with next year's breakfast containing several less items than the previous year.

She added that data indicates the district is on track to serve 150,000 more meals next school year. She said the thought of students losing access to food and staff implementing the decisions weighs heavily on her and her colleagues.

Ms. Wagner briefly provided information related to furloughs. She cited a recent executive order emphasizing the preservation of instructional time. As a result, furlough days are no longer being considered.

Finance Director Matt Brown presented information about nonprofit and entrepreneurial opportunities:

#### Partnerships for support

- Currently utilize partnerships to expand student support, focusing on:
  - Afterschool programs
  - Family resources

#### Entrepreneurship

- Support entrepreneurship in education by integrating:
  - Real-world skill building
  - Strategic school programs

#### External resources

- Leverage grants, donations, and community-based services to:
  - Enhance support offerings
  - Minimize district costs

#### Long-term sustainability

- Align operations with sustainability through:
  - Strategic resource stretching
  - Improved student outcomes

Assistant Finance Director Bob Blyth presented information related to 2027-28 scenarios:

Variables affecting resources

- Unknown state school funding
  - Late May/June is typically when we know for sure
- Enrollment decline
- Building scenarios
  - Scenarios at 0%, 4%, and 7% of SSF increases
  - Note: Other districts are currently using 5-10%
- Beginning fund balance
  - How will we end the 2026-27 fiscal year?
  - Spending slow-down/freezes for 2026-27?

Variables affecting requirements

- Materials and service increases
  - Utility rates, gas prices, and other inflationary increases
- Employee costs
- Increase in programs and services
- Additional unfunded mandates

Mr. Brown acknowledged the budget variances the district has encountered during the school year and said they are reframing their work with three questions: 1) What happened? 2) Why did it happen? 3) How will we adapt in the future to ensure that it doesn't happen again?

He said initially the district identified a goal of a \$30 million reduction. He said not all personnel and materials expenses were fully known at the time and some of the items could have been better anticipated. He cited inherent variances and acknowledged that the size of the recent \$16.4 million variance is unsettling.

Mr. Brown presented a line graph depicting deficit spending. He noted that the district has been using fund balances and reserves to maintain current service levels. He said last year was the first in many years that the district has made structural reductions.

Mr. Brown provided recent budget history:

- Forecast in May 2023
- Forecast in April 2024
- Forecast in April 2025

He presented identifying the variance – estimates:

- Factors of the remaining gap in 2026-26 (in millions)
  - \$27.7M < \$30 million goal: \$2.30
  - Personnel: \$3.22

- Associated payroll costs: \$2.85
- Staffing adjustment poll: \$1.50
- Programs and services: \$3.50
- Risk insurance and liabilities: \$2.50
- Other small variances: \$0.63
- Estimated total: \$16.4

Mr. Brown explained that their department will transition from looking at averages to individual line items.

He outlined budget timelines, new forecasting models, and new software:

- Budget timelines
  - Better identified timelines and processes for our staff and department to be aware of for 2027-28, including regular meeting updates with Departments and school and engagement events with the public
- New forecasting models
  - In preparation for the new year our team will build new forecasting models, working with per-pupil expenses and specific departmental expenses to ensure more accurate predictions
- New software
  - Going live in January 2027 this will allow us to forecast payroll costs accurately within the financial system providing actual data on a per-person basis and improving position control

Mr. Brown and Mr. Blyth outlined filling the gap for 2026-27:

*\*Finer details were provided in the PowerPoint presentation (also available on the district website)*

- Beginning balance: \$18,120,000
- Total resources: \$289,618,800
- Total requirements: \$274,991,982
- Total reserves: \$14,626,818
- 2027-28 projected beginning fund balance: \$14,626,818
- Reserve policy required minimum:
  - 3% contingency: \$8,249,759
  - 2% unappropriated: \$5,499,840
  - Total: \$13,749,599

The current budget is \$877,219 over the reserve minimum. The above is a projection and assumes receiving every revenue dollar and spending of every expense dollar.

Mr. Brown provided a phone number where he can be reached to discuss school finance: 503-705-1041.

Mr. Brown and Mr. Blyth invited questions from the Committee.

Responding to an inquiry from Ms. Jonak regarding a lack of information about variances in monthly finance reports to the Board of Directors, Mr. Brown said their department did not use actuals until the March forecast. He said they were still conducting bargaining and the retro payments for the Oregon School Employees Association (OSEA) did not hit payroll until the end of January. Their department did not start using actuals this current year until the March forecast. He added that one of the biggest variances going into the beginning fund balance for 2026-27 was the miscalculation of salary savings. He described their process for staffing reports. He said during the staffing reports they began noticing discrepancies and portion of the numbers did not come into reality until spring break. He also mentioned PERS actuals as a contributing factor.

At Ms. Jonak's request, Mr. Brown said he will follow up with more information from the March 24 finance report.

Responding to a question posed by Ms. Fellows regarding ODE high-cost disability funds, Mr. Blyth said the district gets their high-cost disability funds in May based on projections for the upcoming year and the state limits the funding available to \$55 million. He cited variances for other districts resulting in a redistribution of the \$55 million.

Responding to a question posed by Chair Salic, Mr. Blyth provided further context about PERS.

Vice Chair Stillie requested an explanation of how the proposed food services changes align with the district's stated equity values.

Superintendent Mickelson said it is becoming harder to sustain the current nutrition model as roughly 32% of the nutrition services budget is supported by the general fund. She said other school districts have on average a 0% or 5% general fund transfer. She touched on creative solutions that district leadership is considering.

Responding to a question posed by Ms. Jonak, Ms. Cuadros explained that because the district does not collect individual data on families, there is no mechanism to distinguish a student in poverty.

Mr. Fellman asked about the cost and calorie difference between the two meals presented earlier in the meeting.

Ms. Cuadros said their department consistently exceeds the reimbursement rate with the current volume of food. She said she can provide a cost and calorie difference at the next meeting.

Responding to a question posed by Ms. Munro, Ms. Cuadros described how in the new system, non-reimbursable meals will create a fee to the parent instead of billing the general fund. She added that the district is not legally allowed to turn away a student at mealtimes.

Ms. Newman asked what happens if a parent gets a bill they cannot pay.

Superintendent Mickelson said leadership is exploring ways to not burden families with the additional expense.

Ms. Cuadros and Ms. Mayer fielded questions related to nutrition services from Ms. Rabasa.

Ms. Jonak asked about the district's ratio of counselor to student.

Ms. Wagner said she will follow up with the information.

Ms. Munro asked if the new financial system will provide month-to-month financials.

Mr. Brown responded affirmatively.

Ms. Fellows asked what the district is doing to track the students who are being pushed out.

Superintendent Mickelson assured Ms. Fellows that there are strategies in place. She will follow up with more information in the future.

Ms. Jonak asked if when issuing reductions the district is taking into account staff that may be relying on a certain number of hours for health insurance and other benefits.

Superintendent Mickelson responded that leadership takes it into consideration the best they can. She added that there are contractual and legal requirements to adhere to.

Regarding the purchase of new financial software, Ms. Newman noted a learning curve in conjunction with a challenging budget cycle.

Mr. Brown acknowledged Ms. Newman's concern and provided relevant information about necessity of the new financial software.

## **VII. RECEIVE AN OVERVIEW OF SPECIAL REVENUE:**

- **TITLE AND IDEA (INDIVIDUAL WITH DISABILITIES EDUCATION ACT) FUNDS**
- **INTEGRATED GUIDANCE – SIA (STUDENT INVESTMENT ACCOUNT) AND HSS (HIGH SCHOOL SUCCESS)**

Director of Elementary Education Jeff Johnson provided information about Title and Idea (Individual With Disabilities Education Act) Funds.

- Title I: \$4.8M
  - Supports low-income students/families to meet state academic standards
- Title II: \$611k
  - Supports development of staff to strengthen quality of instruction
- Title III: \$86k
  - Supports English-learners to develop language and academic skills
- Title IV: \$359k
  - Supports well-rounded education, safe and healthy schools and technology

Director of Student Services Seth Pfaefflin provided information about Individuals with Disabilities Education Act (IDEA) funds.

- Funding for IDEA: \$2.2M
  - 99% of funding is dedicated to staff
- General fund support for SSD
  - The majority of SSD expenses come from the general fund
  - \$49.1M in SPED funding
- Expenses reported in ODE for partial reimbursement

Mr. Pfaefflin fielded questions from committee members.

Mr. Blyth provided information about high-cost disability and SSF changes:

ODE is updating methods of disbursements to schools

- Distribution will move to a 10-year lookback on actuals vs. relying on districts to estimate
  - Will lead to better forecasting in the future, but may have an initial impact to our current revenue forecast for 2026-27

SSF estimates continue to fluctuate

- What is our May adjustment?
  - SSF estimates change even yesterday

Ms. Wagner provided information about High School Success:

*\*Finer details, such as focus areas, were provided in the PowerPoint presentation*

- \$4.6M (2026-27 budget)

Ms. Wagner provided information about the Student Investment Act in 2026-27:

*\*Finer details, such as focus areas, were provided in the PowerPoint presentation*

- \$15.5M (2026-27 budget)

## **VIII. RECEIVE INFORMATION ON DEBT SERVICES**

Mr. Blyth presented information about Debt Service.

- General Obligation Bonds and PERS Bond: \$56.2M
  - Payments through 2042 with current schedule
  - Still have \$49.3 million of authorization remaining for 2018 bond
- PERS Bond:
  - Final payment June of 2028
  - The district will return to paying the full identified PERS rate in 2027
  - Overall, the PERS bond has saved the district over \$25M to date

## **IX. RECEIVE INFORMATION FOR CAPITAL PROJECTS**

Mr. Brown and Mr. Blyth presented information about Capital Funds.

- Capital Funds: \$73.2M (2026-27 budget)
  - Capital funds include the district maintenance fund, property sales, bond expenditures, and the capital reserve fund
  - \$10M is being transferred out of the Capital Reserve Fund. The reserve fund
- Other funds:
  - Custodial funds: \$170,000
  - Insurance reserve funds: \$54,546,000
  - Other special revenue funds:
    - State and local grants: \$4,723,944
    - Student body: \$7,500,000
    - KRVM: \$1,630,000
    - EEF gifts and grants: \$358,000
    - Curriculum: \$487,050

## **X. QUESTIONS AND DISCUSSION**

Chair Salic opened the floor to questions and discussion.

Ms. Newman asked if the district is realizing funds related to billing Medicaid.

Mr. Brown responded that the district piloted the program and received about \$35,000. He said additional staffing and support is needed thus they are pausing the program for next year.

Responding to a question from Ms. Rabasa, Mr. Blyth said that because charter schools have had steady enrollment, they are not experiencing significant impacts to school funding. He may follow up with more information specific to Network Charter School.

Mr. Pfaefflin added that Network Charter School received an additional Educational Assistant (EA).

Ms. Munro asked about capital funds, noting that bond dollars can only buy something once. She provided an example of the need to replace laptops.

Mr. Brown acknowledged that it is a challenge. He said the IT Director is working on identifying a plan for technology replacements.

Mr. Richardson requested a breakdown of the \$7.5M Student Government fund.

Mr. Brown said each school has a specific account and category code. He provided examples of student body activities, such as baseball, speech and debate, and music.

**XI. PREVIEW OF NEXT MEETING**

Superintendent Mickelson presented a preview of the upcoming Budget Committee meeting scheduled for Wednesday, May 6, 2026.

**XII. ADJOURN**

Chair Salic adjourned the meeting at 9:44 p.m.