

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

A. Approval of Minutes

4

B. Personnel Report for August 2024

5. Recurring Reports

A. AEA Report - 5 minutes

Presenter: AEA President Tia McLean

B. OSEA Report 5 minutes

Presenter: OSEA Board President Steven Essig

6. Board Reports 30 minutes

Presenter: Board Chair Rebecca Dyson

7. 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

8. District Staff Updates

A. Superintendent Report 15 minutes

Presenter: Superintendent Joseph Hattrick

1) Update on the selection of new student representatives for 2024-2025 14

B. Capital Bond 15 minutes

Presenter: Executive Director of Operations Steve Mitzel, HMK Program Director

Mike Freeman, Bond Administrator Rebecca Bjornson

1) Monthly Bond Report - July 2024 19

C. Finance Report 15 minutes 59

Presenter: Director of Business Services Scott Whitman

9. Unfinished Business

10. New Business

A. Board Policies - Review of Required New and Updated Policies 10 60
minutes

B. Cell Phone Policy 15 minutes 73

Presenter: Superintendent Joseph Hattrick

The Board designates the following firms as legal counsel for the 2024-2025 school year:

- Miller Nash LLP

ACTION ITEM: Approve new engagement letter for Miller Nash

- Hungerford Law
- Thad Pauck, TGP Law, P.C.

11. Announcements and Appointments

Presenter: Board Chair Rebecca Dyson

A. The Board will hold its summer retreat on Friday, August 16, 2024, from 8:30am-4:30pm, and Saturday, August 17, 2024, from 8:30am-12:00 noon. The retreat will be at the Ashland Hills Hotel.

B. The Board will hold a Work Session on Thursday, August 22, 2024, beginning at 7:00pm. The meeting will be virtual on Zoom.

C. The next Regular Session meeting will be held on Thursday, September 12, 2024, beginning at 7:00 pm in the City Council Chamber, 1175 E. Main Street, Ashland. A Zoom link will also be available.

12. Adjourn

Presenter: Board Chair Rebecca Dyson

MINUTES

1. Call to Order and Roll Check

Chair Dyson called the meeting to order 7:00 pm and a roll check confirmed that all members were present.

2. Land Acknowledgment

Chair Dyson read the Land Acknowledgment.

3. Organization of the Board for 2024-2025 School Year

3.A. Action Item: Election of Board Chair

Director Franko nominated Director Rebecca Dyson for Board Chair for 2024-2035 and Director Ruby seconded. There were no additional nominations. Director Dyson was elected Chair for the coming year.

3.B. Action Item: Election of Board Vice Chair

Director Hatch nominated Director Jill Franko for Board Vice Chair for 2024-2025 and Director Ruby seconded. There were no additional nominations. Director Franko was elected Vice Chair for the coming year.

4. Adoption of Agenda

Director Hatch moved and Director Skuratowicz seconded the adoption of the agenda for the July 11, 2024, regular meeting. The motion carried by unanimous vote of the members.

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

Chair Dyson reviewed the required annual renewals, authorities, and business relationships that the Board approves at its first meeting in July each year. The report on the alternative education program Willow Wind was also included.

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

5.A. Approval of Minutes of the June 13 regular session.

5.B. Personnel Report for June 1, 2024 - REVISED

5.C. Personnel Report for July 1, 2024

5.D. Established Time and Place of Official School Board Meetings as the second Thursday of the month for regular sessions and the fourth Thursday of the month for work sessions.

5.E. Appointed Superintendent Joseph Hatrick as Clerk.

5.F. Appointed Director of Business Services Scott Whitman as Deputy Clerk and Designated Procurement Officer.

- 5.G. Appointed Director of Business Services Scott Whitman as the District Budget Officer.
- 5.H. Designated Superintendent Hattrick as District Representative to Submit All Federal Grant Funds.
- 5.I. Designated both Superintendent Hattrick and Business Services Director as Custodians of Funds.
- 5.J. Fidelity bond amounts/ bonded employees. Through a liability insurance policy, satisfied loss coverage requirements at \$500,000 per employee.
- 5.K. Selected US Bank and Banner Bank as the District's Official Banks for 2024-25.
- 5.L. Designated the Local Government Investment Pool as the District's investment fund.
- 5.M. Designated KDP Certified Public Accountants, LLC as the District auditor for the 2024-2025 year.
- 5.N. Designated Brown and Brown Northwest as the Insurance Agent of Record.
- 5.O. Established the federal mileage reimbursement rate as the District mileage rate for work-related travel by employees.
- 5.P. Established the Oregon State School Fund General Purpose Grant per Extended ADMw as the tuition rate for nonresident students.
- 5.Q. Designated the Rogue Valley Times as the Official Newspapers of Record
- 5.R. Annual report from Willow Wind Community Learning Center, the District's alternative education program

6. Board Reports

Director Hatch reported that he had a meeting with Dr. Hattrick to get acquainted and review upcoming work. The Khan Academy demonstration of its new student support software was fascinating and has much potential to improve the experience and outcomes for both teachers and students. He saw opportunities for our District to bring on new tools.

Director Skuratowicz attended a meeting of the Jackson County Youth System of Care supported by Jackson Care Connect. The program does school supports, and its focus this year is on chronic absenteeism. She is excited about having support for increasing attendance. They mentioned our reimagining high school innovation committee, and are interested in the perspectives of students. Program organizations want to investigate the ways that students are disengaged from school.

Vice Chair Franko also appreciated the Khan Academy Zoom meeting and is excited about new opportunities. Ashland Schools Foundation had its last Board meeting of the year and members celebrated their great year of accomplishments. As Director Franko has represented the school board at several ASF meetings, the Board would welcome brief updates on actions at ASF throughout the year. Other school board members are welcome to attend ASF meetings when Jill cannot go. Both Chair Dyson and Director Ruby expressed interest in doing that. ASF Executive Director Erica Thompson is also happy to meet with people individually.

Director Ruby attended the Ashland Community Health Foundation community symposium, talking about school-based health centers. He continues attending Sunstone board meetings. Director Skuratowicz also attended the symposium and said there was a great group of folks looking at health issues in the Rogue Valley.

Chair Dyson served as the school board representative in the Ashland Fourth of July parade. She read a tribute to AHS written by a student who graduated this year, appreciating all of the support he received from students and teachers through the year, and said that he discovered the joys of music. All together he loved his 11 years in the Ashland School District and is excited for his future.

Chair Dyson commented that a special aspect of the Ashland schools is that we create wonderful relationships.

7. Hear Public Comments

There were none.

8. District Staff Updates

8.A. Superintendent Report

Dr. Joseph Hattrick, incoming superintendent, said that he is happy to be attending his first Board meeting in his new role. He thanked the Board members for this opportunity and also thanked the community for the warm welcome he has received. He expressed appreciation to the 12-month employees who work through the summer, to the Ashland Chamber of Commerce for the parade, and the community people who attended. He observed that Ashland really loves its parades. He thanked the American Band College for the concerts it played at AHS and the Lithia Band Shell. He had the opportunity to watch an AHS soccer practice, and observed a great team. He said that he has an open-door policy and looks forward to meeting more members of the staff and community.

Dr. Hattrick reviewed his entry plan for first 88 days in the district. He broke these out as:

- Introductory phase
- Listening to Understand
- Making Sense (reviewing data and having focus conversations)
- Engagement and planning to build the foundation for future strategic planning.

The District will be announcing upcoming “Meet and Greet” events to meet the its leadership team.

Director Skuratowicz said these conversations will be good preparation for our future conversations about restructuring. Dr. Hattrick’s goal is to learn at a deep level. Chair Dyson encouraged everybody to take a look at the entry plan, which will be posted on the District web site. It is a great summary.

8.B. Capital Bond

8.B.1) Monthly Bond Report

Executive Director of Operations Steve Mitzel and HMK Program Director Mike Freeman presented the June monthly bond report. AHS is the summer focus. The Science Building roof replacement started with removal of the rock layer on top of the building. Work also began on interior classrooms, with work on floors and finishes. An area of the building is undergoing renovation rather than new construction. Some parts are being demolished because the building is a shell that was built around another existing structure. We are hoping to get plans for the seismic retrofit out to bid by the end of December. Once we receive cost estimates, we may need to look at reallocation of unallocated bond funds to augment the \$2.5 million seismic grant received, as the State does require some matching funds.

The Humanities Building exterior concrete railings were demolished, and are being replaced with metal railings with a more aesthetic appeal. The last seismic upgrades are taking place. On the third-floor concrete is being poured for bracing, and exterior decorative tile murals are completed. Interior painting is underway. The south side rest rooms are being renovated and the north side rest rooms are done and in finishing stages. The elevator installation is beginning. Interior finishing is happening with doors, windows, and casework in the classrooms. There have not been a lot of financial changes. Heating and Air structural underground work is happening, with crews working around the redwood tree in the Quad. Installation of mechanical, fire alarms, plumbing, and other systems work is happening.

A new electrical vault will be installed to support the new HVAC system in the gym area. Some of the existing senior murals are being installed in the Records Library, aka “the dungeon,” to enliven the space. Crews are also giving it a new coat of paint and adding more light fixtures.

At Helman Elementary finishing touches are being put on landscaping. We are waiting for more growth and propagation. We had minimal loss from winter. The projects are essentially complete.

Contractors seeded the upper field at TRAILS and we then experienced problems with the irrigation system, which has now been repaired. The plantings still need time to take hold and grow, so the field will not be available for use until next spring.

Mr. Mitzel reported that we need to replace five panels in the AMS solar array because vandals broke them with thrown rocks. The damage expenses are too limited to use insurance, totaling about \$2500. We hope that this is a one-time occurrence. If the vandalism persists, we may need to look at barriers or fencing.

The week of July 29 the main AHS campus power will be turned off for a couple of weeks, in order to make it possible for teams to work rapidly.

9. Unfinished Business

There was none.

10. New Business

10.A. **Action Item:** Approve Corrective Action Plan Addressing Findings in the District's FY2022-2023 audit.

Director of Business Services Scott Whitman reviewed the recently completed audit of FY2022-2023. There were no material weaknesses reported but there was one finding related to Federal awards, indicating the District's failure to adequately report time and effort on Title I grants. While this is not a significant deficiency, it did result in a qualified opinion. This is an HR process of documenting staff for whom all or part of their compensation is charged to the grant. It requires up-to-date hiring documents and time sheets that are correctly verified. Staff transitions played a role in this. The District is required to file a Corrective Action Plan with the Secretary of State.

There was a previous finding from the 2021-2022 school year that bank reconciliations were not signed by the Business Services Director and documented monthly. We made the necessary corrections but did not document that in the subsequent year.

A second deficiency noted was a failure to make appropriate prior year adjustments in the audited year. That was the year our existing auditor failed to produce a completed audit by December 31 and this required current auditors KDP to correct prior year statements to match accurate numbers for 22-23. Mr. Whitman stated that the District is responsible for our own financial statements and we could have been more careful about verifying the numbers we presented. The reference to "weak internal controls" reflects the reality that our small staff doesn't include specialized accounting staff to review work with a second set of eyes.

Mr. Whitman's recommendations for improvement included:

- Set a fixed year-end closing schedule with review of all accounts
- Establish a secondary review level.
- Identify administrative level staff who will perform the verification that work grant supported is happening as required.

Mr. Whitman requested Board approval of the Corrective Action Plan (CAP).

Director Franko asked whether Superintendent Hattrick had concerns or comments? He stated that he did not at this time. Mr. Whitman stated that the findings should not have occurred and Dr. Hattrick is not responsible. Dr. Hattrick stated that he has reviewed the matters with Mr. Whitman and believes that the plans to remedy the deficits are solid.

Director Hatch moved and Director Skuratowicz seconded approval of the Corrective Action Plan as submitted. The motion carried by unanimous vote of the members present.

10.B. Action Item: Approve a Master Service Agreement between Ashland School District and Sunstone Housing Collaborative.

Executive Director of Sunstone Housing Collaborative and Director of Business Services Scott Whitman presented the proposed Master Service Agreement between the District and the Collaborative. Ms. Parent stated that the collaborative was created intentionally to be the administrative arm for a proposed housing development on land owned by the Ashland School District. Responsibilities of the Collaborative include:

- Facilitate a feasibility analysis
- Cultivate consultant and partner relationships
- Develop project finance strategy and procurement process
- Handle contract bidding and vendor selections

- Oversee a transition to property marketing and operations.

The Master Service Agreement covers these steps. Ms. Parent thanked the District for partnering on the goal of providing support to families in Ashland and contributing to increased enrollment by providing more affordable housing.

Director Skuratowicz offered some grammatical edits and stressed the importance of supporting the school district families and staff as the end goal. She asked about the phrase “post-closing development” and Mr. Whitman stated that the sale of any property for use in this project will be contingent upon successful completion of the housing development goals spelled out. She also asked about Sunstone’s revenue sources and paid staff. Ms. Parent said that funding to date has come through grants and that she is the only paid person. The six-member board is all volunteer and no one is paid.

Ms. Parent outlined the process by which Sunstone will manage a Request for Proposals from developers, review responses and qualifications, identify recommended developers, and present to its final recommendations to the School Board for approval. The District has authorized the sale and development of the identified parcel and Sunstone will execute the plan.

Director Russell said that he is comfortable with the process as outlined. Sunstone was formed to carry forward a vision of creating affordable housing using surplus land that the District owns. We have important district voices engaged, including Business Director Whitman, Board members, and legal counsel. The aim is to achieve the best possible outcome with appropriate protections built in.

The legal review locks in our vision and protections with minimal risk based on identified potentials threats. Sunstone will monitor housing created according to criteria and potential occupants will be similarly identified. Knowing that the District does not want to be the property manager, Mr. Whitman said that the District’s role ends when the property sale and construction are completed as planned and promised.

There was a request that the document receive careful proof reading and, with that contingency, Director Skuratowicz moved to approve the Master Service Agreement as amended and Director Russell seconded. The motion carried by unanimous vote of the members present.

11. Announcements and Appointments

Chair Dyson read the announcements of upcoming meetings.

12. Adjourn

Chair Dyson adjourned the meeting at 8:15pm.

Submitted by:

Jackie Schad, Board Secretary

Dated for Board Approval: August 8, 2024

Board Chair Rebecca Dyson

Superintendent Joseph Hattrick

MINUTES

1. Call to Order / Roll Check

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

2. AI (Artificial Intelligence) Use in the Classroom

Presenter: TRAILS Teacher Laurie Green

TRAILS Teacher Laurie Green was invited to talk about the ways she is using AI programs in her classroom. Unfortunately, the web site she hoped to demonstrate had just gone down and so she spoke extemporaneously about her use of Magic School. She explained that she is relatively new to computers but started to learn about AI. Magic School was created by a former teacher and designed to help teachers. It includes about 60 different AI tools. She joined an early group and got certified on the program, where she is a now beta tester for the program. She has seen real benefit for her students.

The program offers guidance to students in response to prompts and is good for beginners. Its compliance with instructional standards works through a tool called Compliance Standards Tracker. Magic School accommodates differentiated instruction for different students. It uses text levelers designed for individual students. She can direct the same material but have it created at a learning level for that student. Every tool can read aloud, and can understand speech for students who are auditory learners. There is a writing feedback tool that gives students personalized feedback on their writing. She has also observed that many students engage with the tool by asking additional questions and making improvements to their writing.

Magic School includes some AI powered tools that students enjoy, including a song generator, a debate partner, and a language learning tutor. It allows students to receive personalized lessons while teachers monitor their progress. Because the tools are engaging and interactive students create their own stories and songs.

Some parents have expressed concerns about AI in the classroom and she seeks to educate them on the benefits and ethical use. She believes that transparency and education are keys to addressing concerns. Ms. Green believes that AI enhances a teacher's ability but does not replace human interaction. She also noted that sometimes the tool is imperfect. They have discovered errors in math and the beta testers are working hard to catch errors before new tools are launched.

With the Magic School student module, she can admit a student and offer access only to the specific tools assigned to that student. She can see the AI interaction with the student on her screen. She can flag or lock them down. The teacher has good control. She can monitor their learning progress. If students get stuck the AI will offer prompts.

Director Franko said she was surprised about the help the software offers to students who are shy or don't normally speak up in class. Ms. Green said that she has not received any pushback from

parents yet, though she thinks it may happen because there are a lot of scary stories floating around. She learns what she can about the benefits, the concerns, and the ethical use of the tools. She thinks it is important to teach students with parent support. She is happy to demonstrate to parents and guardians how the tools are used, how they help her teach, and how her students are helped. She admitted that she began as a skeptic and the more she learns, the more she has welcomed the tools.

Director Skuratowicz said that she finds the ChatGPT output is often incorrect and is worried about accuracy with Magic School. How does a teacher prevent misinformation or correct incorrect information? She observes that with programs like MSWord or Grammarly, the suggestions can be incorrect. Ms. Greene responded that the program itself cautions students. For teachers there is a module on “how to AI-proof assignments.” You can embed codes into an AI generator that reveals the AI presence. She limits writing assignments to things in the Magic School platform, which makes it harder for students to sneak in plagiarized content. Of course, the teachers need to moderate and review student assignments.

Ms. Greene said that she has discovered errors in the Magic School Math module. It is important for teachers to review course content before releasing it to students. (The platform itself warns teachers that Math is tricky for AI for some reason) The program does help students with writing and this gives her some extra time to review math lessons.

At this time, Director Hatch noted that the Magic School site was back up and Ms. Green was able to share the overview of individual tools that are available and point out those that she uses frequently with her students. There is a UDL Choice tool (Universal Design for Learning) that will give options for assessing students based on their individual capabilities and needs. Another tool offers many options for explaining new concepts. She created a sample classroom that featured some of the tools so that board members could play with them.

Chair Dyson inquired about the cost. There is a free trial version of Magic School which costs \$100/year for a student. They also have packages available for schools through Magic School Enterprise. You can use the program with a co-teacher and share all of the content remotely.

Chair Dyson thanked Ms. Greene for a great presentation and stated that she can see the possibilities for students.

3. Report from the Board Innovation Committee on Calendar and Schedules

Presenter: Co-Chair Director Russell Hatch, Co-Chair Assistant Superintendent Erika Bare and committee members.

Participants included:

- Student Services Program Assistant Serena Robinson
- AHS teacher Becky DeSalvo
- AMS teacher Elisabeth Atanes
- Former board member Sabrina Prud’homme
- Principal Christine McCollom
- Former HR Director Laurie Rooper
- Budget Committee member Chris Chambers

- Principal Tiffany Burns
- Teacher J'me Strowbridge
- Athletics and Activities Director Patrick Grady

Assistant Superintendent Bare presented the history of the committee, its charge from the school board, the work gathering information, and the development of options the group will present. She presented the list of 18 participants during the year, some of whom attended intermittently.

The focus was on investigating different options for organizing the school year calendar. The group developed Guiding Principles, described the rubric that the group designed to evaluate options, and arrived at four approaches. A work group was assigned to investigate each subject.

- A Balanced Calendar (also known as a year-round calendar)
- An Enhanced Traditional Calendar
- A 4-day school week; 5-day work week approach
- Communications with internal and external constituencies

Director Russell explained that they did a community survey of both internal and external audiences and had 650 respondents. They asked people to rate their options. The 4-day options had the lowest numbers of responses but a higher intensity of opinion.

Concerns raised about year-round school included

- Health (heat and smoke in summer);
- Childcare challenges are easier when schedules are predictable and regular. (Early release Wednesday is not popular for this reason.)
- Difficulty of aligning school and work schedules for vacations, family time, etc.

The Committee believes that better communication with families is needed and if we make big changes, we must carefully make sure that all families have access to the information.

Director Skuratowicz noted that there were varying numbers of respondents to different questions, with some receiving very low responses.

Ms. Robinson and Ms. Prud'homme described the deep look they took at a year-round schedule with frequent breaks. They looked at results from other school districts, along with state and federal research about this model. Most districts did this in response to exploding student enrollment. Students went through in alternating cohorts. Most of the research is old because many districts phased this out as they built out facilities and staff to accommodate their growing populations.

There are many ways to configure the time throughout the year with days on/days off. Extended times out of school could happen during smoke season. It is possible that impacts on Secondary students could impede college prep and planning. Staffing impacts could make incomes intermittent. Student achievement suffers in the face of frequent breaks. Currently, we have AMS on trimesters and AHS on semesters, so it becomes almost impossible to have a consistent calendar for grades K-12.

If the District wants to move towards a balanced calendar, the committee believes we have a strong need for a more parent-friendly and health conscious school calendar that considers child care, consistent schooling, and effective communication.

4. School Board Summer Retreat

Presenter: Board Chair Rebecca Dyson

There was a brief discussion of potential agenda items for the planned summer retreat. Director Skuratowicz suggested inviting an OSBA staff person to talk about board/superintendent effective collaborations. The staff was asked to create a shared document in the TEAMS folder to which people could submit ideas and secretary Schad was asked to post some past retreat agendas.

5. Ashland Board Collaboration with Phoenix-Talent School Board

Presenter: Board Vice Chair Jill Franko

Vice Chair Franko is interested in a joint meeting between the Ashland school board and the Phoenix-Talent board. She also suggested creating a document to collect ideas for a potential meeting between ASD and PTSD, possibly in conjunction with the Board retreat.

6. Executive Session

Presenter: Board Chair Rebecca Dyson

The Board adjourned into Executive Session per ORS 192.660(2)(d) to conduct deliberations with persons designated by the governing body to carry on labor negotiations.

7. The Board emerged from the Executive Session to review any other items of interest that members wished to bring before it.

Presenter: Board Chair Rebecca Dyson

There were no further items presented.

8. Adjourn

Presenter: Board Chair Rebecca Dyson

There being no further business, Chair Dyson adjourned the meeting.

Submitted by:

Jackie Schad, Board Secretary

Dated for Board Approval: August 8, 2024

Board Chair Rebecca Dyson

Superintendent Joseph Hattrick

Ashland School District 5

Code: BCBA
Adopted: 5/23/02
Revised/Readopted: 5/08/17; 4/24/23
Orig. Code: BCBA

Representatives to the Board

To facilitate communication between students and the School Board, up to two student representatives and up to two alternates to the Board will provide for a method of direct communication with district students. Student representatives, from Ashland High School, shall be selected through a process outlined in BCBA-AR(1) for a term of one year starting in July. In order to provide equitable opportunity for other students to serve alongside the School Board, student representatives will serve a maximum of one term.

The student representatives shall receive notice of regular Board meetings, the agenda and the appropriate agenda materials (aka “the Board packet”) for each meeting; be provided a place at the Board table; and shall have the same privileges of discussion at Board meetings as apply to Board members. Student representatives will fulfill their duties at regular Board meetings and work sessions; thus they will not participate in executive sessions, collective bargaining sessions, nor contract maintenance meetings. The student representatives are not voting members of the Board.

The School Board Chair or designated Board member will meet with the students to describe the position and responsibilities of the student representatives to the School Board. Board members will meet with the new student representatives within the first month of the student’s term. Student representatives will abide by all laws, policies, and operating agreements of the Board.

END OF POLICY

Legal Reference(s):

[ORS 332.107](#)

Ashland School District 5

Code: BCBA-AR(1)
Adopted: 4/24/23

Student Representative(s) to the School Board Procedures

1. The process:
 - a. Application packets will be available from the principal's office and completed applications must be turned into the principal or principal's secretary:
 - (1) Application packets will include Board policies BCBA, BCBA-AR(1) and BCBA-AR(2);
 - (2) The application will include a statement of expectation; and
 - (3) The application will include information about the approximate number of all Board meetings including retreat dates.
 - b. Each current student Board representative will work with their principal to advertise and promote the position(s);
 - c. After submission deadline, each current student Board representative will hold informational meetings with the applicant(s) at the high school;
 - d. The informational meetings will include expectations and duties of the student representative which may include:
 - (1) attending all regular Board meetings and work sessions;
 - (2) representing all students in the Ashland School District;
 - (3) presenting to the School Board specific proposals and opinions from students and, when appropriate, placing proposals on the School Board agenda in accordance with Board procedures;
 - (4) attending meetings with various student groups such as AHS Leadership class and school-sponsored clubs and organizations, as desired; and
 - (5) meeting with school/district administration or the Board Chair or Vice Chair, as needed;
 - (6) In preparation to serve alongside the Board, student representatives will review the Oregon Revised Statutes 332 which explains the purpose of Oregon School Boards.
 - e. Each student representative shall serve a term for an academic year and attend all School Board meetings. If the student representative is unable to attend a Board meeting, then their alternate will take their place. The student representative and their alternate will be responsible to stay fully informed and up-to-date by the following means:
 - (1) Each student representative is responsible to keep their alternate abreast of key issues in front of the school board;
 - (2) The student representative shall give timely notification to the School Board Chair and their alternate, in the event that they cannot attend a School Board meeting;
 - (3) With the Board Chair's consent, the student representative and their alternate may switch roles at the AHS semester break (January).

- f. The duties of the incumbent student representatives in onboarding their successor shall include:
 - (1) Helping with the application process as outlined in this Administrative Regulation (AR).
 - (2) Meeting one-on-one with their successor prior to the end of their term and highlighting ongoing projects.
 - (3) Attending relevant Board meetings in the period between their selection and their appointment
 - (4) Facilitating the introduction of the successor to Board members.
 - g. Each current student Board representative will work with their principal to create an interview team to possibly include:
 - (1) both current student Board representatives and the high school principal;
 - (2) counselor and/or teachers; and
 - (3) student representative from the AHS EDI committee or site equity team.
 - h. The team will interview each applicant;
 - i. The team will recommend their site representative to the School Board via the AHS Principal and/or Superintendent:
 - (1) The AHS principal will send their recommendations to the Superintendent, along with a brief narrative on their selection; and
 - (2) all applications will be included in the Board packet.
 - j. Once the AHS application process is complete and their recommendation is forwarded to the Superintendent, the AHS principal will talk with each applicant to notify them if they will be recommended for appointment;
 - k. At the first May Board meeting, the Superintendent will bring forward the recommendations and the current student Board representatives will announce their school's recommendation for the School Board's consideration; and
 - l. Each current student Board representative will assist in the onboarding process of the newly selected student Board representatives.
2. Process dates:
- a. Applications will be made available before spring break in March;
 - b. Informational meetings will be held at each site/school after spring break;
 - c. Applications will be due to the principal by mid-April;
 - d. Interviews will be conducted at each site during the third week of April;
 - e. Committee recommendations will be forwarded to the Superintendent no later than the last Tuesday in April;
 - f. New student Board representatives will be recommended to the Board at the first meeting in May, and they may attend Board meetings in May and June; and
 - g. Newly appointed student Board representatives will begin their term of service on July 1.
3. Outreach and advertising will be through, but not limited to, the following methods:
- a. School newspaper (Rogue News)
 - b. School newsletters (Grizz-O-Gram)

- c. School student email
 - d. TV screens within schools
 - e. PA Announcements
 - f. Class Instagram accounts
 - g. Teacher PR in classrooms
 - h. Fliers and table tents
 - i. Other social media platforms (District social media)
4. In the application, these questions will be required:
- a. Why would you like to serve on the School Board? (300 words or less)
 - b. How would you provide value to the School Board if you were selected? (300 words or less)
 - c. Describe an aspect of school culture or policy that has impacted you. (150 words or less)
 - d. What impact would you seek to have on the Ashland School Board? (150 words or less)
5. During the interview, applicants may be asked the following questions:
- a. What qualities do you believe you possess that make you a good representative of Ashland High School students on the Ashland School Board?
 - b. What do you feel are some issues facing students in our district that you think school leaders should address? What are your suggestions for solutions to these issues that you might present to the decision makers?
 - c. What lens can you bring to the discussion of Equity, Diversity, and Inclusion? How do you feel our schools need to grow in this area?
 - d. How will you balance the life of a high schooler with the duties of this position?
6. Application: BCBA-AR(2) – Student Representatives to the Board Application

Ashland School District 5

Code: BCBA -AR(2)
Adopted: 4/24/23

Application for Student School Board Representatives

Name: _____ Home Phone: _____
Cell Phone: _____ Email: _____
Address: _____
City: _____ Zip Code: _____
Year in School: _____ School: _____

Why would you like to serve on the School Board (300 words or less)?

How would you provide value to the School Board if you were selected (300 words or less)?

Describe an aspect of school culture or policy that has impacted you (150 words or less).

What impact would you seek to have on the Ashland School Board (150 words or less)?

Can you commit to attending the meeting dates that have been approved by the School Board?
 Yes No

Please list up to three teachers or staff members we can reach out to as a reference for you.

- 1) _____
- 2) _____
- 3) _____

Student Board members are appointed by the School Board in an advisory capacity. Appointees are selected from the completed applications; emails and letters of interest will not be considered. Please return completed form to your school principal.

Student Signature: _____ Date: ___/___/___



AHS Science Classroom

ASHLAND SCHOOL DISTRICT CAPITAL BOND PROGRAM

END OF MONTH REPORT – JULY 2024





GENERAL PROGRAM UPDATE

July marked the peak of the “summer burn” in which the construction teams take advantage of vacant campuses to maximize productivity. The Ashland High School Modernization project was extremely busy with work occurring across the campus. The Humanities building was seeing finishes being completed while simultaneously experiencing some demo in various locations. The Science building had work occurring on all floors including the roof replacement, and the Gym and English buildings were undergoing demo and site work for the last portion of bond project work. The last of the AMS roofing issues were addressed and the team will now be observing the roof and awaiting the first rains to analyze the remediation efforts.

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 July, we requested 3 purchase order and processed 15 invoices.

Contract Type	Number of Contracts	Value
Professional Service Agreements / Design Contracts	--	\$ 22,349,015
Construction Contracts	3	\$ 104,870,698



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.

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	98%	Working Through Contracting Controls
Construction	06/16/23	12/31/24	65%	HUM/SCI Underway
Substantial Completion	12/31/24	12/31/24	0%	
Post Occupancy Evaluation	TBD	TBD	0%	
Warranty Period	01/01/25	01/01/26	0%	
Other				

CURRENT ACTIVITIES

July marked an extremely busy month on campus for construction related activities. In the Humanities building, new doors are being installed and painted, ACT grid and tiles ceilings are being installed, MEP is being trimmed out, new fire sprinklers are being installed and interior framing is taking place. The south stairwell restroom has been demoed and is now ready to start being reconfigured. On the exterior, the last of the concrete panel guard rails were removed in preparation for the new steel guardrails. The last of the structural shotcrete was placed on the third floor and a couple of select locations. Next month the focus will be on getting the second floor ready for staff return.

At the Science building and adjacent site, the new generator is now installed, and the pathways have been trenched for the electrical feed. The new hydronic lines are trenched and installed across the campus quad to feed the upgraded HVAC at the Science building. On the interior, the team has transitioned from the phase 1 work to phase 2, which includes work expanding outside of the Science classrooms. This work entails some select abatement, demo of existing soffits, MEP demo, framing, door installations and some finish work including concrete polishing and case work. This phase 2 work is focused heavily in the tech area. On the roof, the new roof installation is well underway and minimal structural water damage has been observed.



For the remainder of the campus, work has begun in the Gym and English building. At the Gym, the utilities are being rerouted or replaced to accommodate this new work. Hydronic lines have been trenched and the new underground power feeds have been installed. The site prep work was completed for the new chiller. Demo has started in the English building for the restroom upgrades.

ACTIVITIES SCHEDULED FOR NEXT PERIOD

- Installation of new metal guardrails at the Humanities Building
- Completion of the English building restroom renovations
- Finishes completed in Humanities spaces
- Completion of the new Science roof

ADDITIONAL INFORMATION

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

Josh Whitaker, Project Manager

josh.whitaker@hmkco.org

541.601.3638



PROJECT PHOTO GALLERY

Science Building Roof Replacement





New Mechanical Chase and New Hydronic Routing at Science Building





New Doors and Restroom Tile in Humanities 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%	
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
JUNE 30, 2024**

Project Expense	Original Budget	Paid to Date	Remaining Balance	Revised Budget
Hard Cost				
Technology	\$ 3,420,000	\$ 3,534,881	\$ (135,657)	\$ 3,399,224
Restrooms	\$ 3,087,500	\$ -	\$ -	\$ -
Security	\$ 2,850,000	\$ 293,567	\$ 13,375	\$ 306,942
HVAC & MEP	\$ 13,569,000	\$ -	\$ -	\$ -
Transportation	\$ -	\$ 559,844	\$ 1	\$ 559,845
Bellview	\$ -	\$ 1,574,134	\$ 123,148	\$ 1,697,282
Maintenance	\$ -	\$ 676,982	\$ 0	\$ 676,982
District Office	\$ -	\$ -	\$ -	\$ -
Asbestos Abatement	\$ 316,447	\$ -	\$ -	\$ -
Construction Contingency	\$ 1,348,640	\$ -	\$ 300,769	\$ 300,769
Construction Sub Total	\$ 24,591,587	\$ 6,639,408	\$ 301,636	\$ 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	\$ 113,852	\$ 168,207	\$ 282,058
A & E Reimbursable Expenses	\$ 41,670	\$ -	\$ 10,000	\$ 10,000
Commissioning	\$ 145,267	\$ 178,435	\$ (10,435)	\$ 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	\$ -	\$ 29,079	\$ 3,221	\$ 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	\$ 1,200	\$ 27,477	\$ 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	\$ 455,921	\$ 430,139	\$ 886,060
Total Project Cost	\$ 33,467,752	\$ 7,095,329	\$ 731,775	\$ 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
JUNE 30, 2024**

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
OSCIM Grant (Ashland Middle School)	\$ 1,032,927	\$ 4,000,000	\$ 4,000,000	\$ -	\$ 4,000,000
Seismic (Walker)	\$ 2,500,000	\$ 2,497,447	\$ 2,497,447	\$ -	\$ 2,497,447
Seismic (Walker-Gymnasium)	\$ -	\$ 1,834,325	\$ 1,834,325	\$ -	\$ 1,834,325
Seismic (Ashland High School)	\$ -	\$ 1,396,983	\$ 2,500,000	\$ -	\$ 2,500,000
Investment Interest	\$ 5,000,000	\$ 6,524,922	\$ 4,628,566	\$ 1,896,356	\$ 6,524,922
Miscellaneous	\$ -	\$ 250,540	\$ -	\$ 146,252	\$ 146,252
Total Revenue	\$ 138,349,617	\$ 146,320,906	\$ 143,584,335	\$ 3,735,300	\$ 147,319,635

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

143584335.2
\$ 0

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
JUNE 30, 2024**

Program Expense	Original Budget	Paid to Date	Remaining Balance	Revised Budget
District Wide Programs	\$ 24,591,587	\$ 6,639,408	\$ 301,636	\$ 6,941,044
District Wide Solar Projects	\$ -	\$ 927,432	\$ 723,366	\$ 1,650,798
Helman Elementary	\$ 11,294,084	\$ 15,357,996	\$ (222,925)	\$ 15,135,071
Walker Elementary	\$ 11,252,185	\$ 29,842,246	\$ 375,290	\$ 30,217,537
Ashland Middle School	\$ 21,960,270	\$ 35,732,695	\$ (285,319)	\$ 35,447,376
Ashland High School	\$ 9,124,089	\$ 10,936,405	\$ 16,680,684	\$ 27,617,089
Willow Wind Learning Center	\$ -	\$ 1,732,696	\$ 1,732	\$ 1,734,428
Construction Sub Total	\$ 78,222,215	\$ 101,168,878	\$ 17,574,465	\$ 118,743,343
Soft Cost				
Administrative Cost				
Legal Fees	\$ 100,000	\$ 26,089	\$ (2,675)	\$ 23,414
Bond Counsel	\$ -	\$ -	\$ -	\$ -
Bond Issuance Cost	\$ 625,293	\$ 625,293	\$ 0	\$ 625,293
Builders Risk Insurance	\$ -	\$ 80,126	\$ (7,926)	\$ 72,200
Project Management	\$ 2,274,483	\$ 4,474,067	\$ (465,203)	\$ 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)	\$ -	\$ 386,093	\$ (80,444)	\$ 305,649
Ashland SD Staff	\$ -	\$ 1,125,846	\$ (268,210)	\$ 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	\$ 8,304,572	\$ (124,772)	\$ 8,179,800
A & E Reimbursable Expenses	\$ 144,431	\$ 35,420	\$ 81,103	\$ 116,523
Commissioning	\$ 334,589	\$ 387,719	\$ (27,410)	\$ 360,309
Printing & Plan Distribution	\$ 31,288	\$ 1,724	\$ 55	\$ 1,779
Hazardous Materials Consultant	\$ 418,761	\$ 522,676	\$ (46,820)	\$ 475,856
Construction Testing	\$ -	\$ -	\$ -	\$ -
Constructability Review	\$ 285,616	\$ 573,003	\$ 470	\$ 573,473
Plan Review & Building Permits	\$ 764,778	\$ 3,216,446	\$ 300,767	\$ 3,517,213
Special Inspection and Testing	\$ 391,469	\$ 654,063	\$ (113,358)	\$ 540,705
Miscellaneous Fees	\$ 205,522	\$ 1,020,355	\$ (178,151)	\$ 842,204
Ed Specs	\$ 73,532	\$ -	\$ -	\$ -
Kitchen	\$ 32,940	\$ -	\$ -	\$ -
Miscellaneous				
Legal Advertisements	\$ 12,823	\$ 1,217	\$ 5,690	\$ 6,907
Furniture, Fixtures, and Equipment (FF&E)	\$ 2,569,031	\$ 2,664,690	\$ 74,149	\$ 2,738,839
Technology	\$ 404,005	\$ 466,937	\$ 20,763	\$ 487,700
Technology (Design)	\$ 467,536	\$ 6,605	\$ 63,870	\$ 70,475
Acoustics	\$ 113,387	\$ -	\$ -	\$ -
Criminal Background Checks	\$ 9,862	\$ 10,915	\$ 1,168	\$ 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	\$ 25,477,083	\$ (636,091)	\$ 24,840,993
Total Project Cost	\$ 111,244,488	\$ 126,645,961	\$ 16,938,374	\$ 143,584,335



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
PROGRAM LEVEL BUDGET
JUNE 30, 2024**

Program Expense		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Soft Cost					
Legal Fees		\$ -	\$ 24,941	\$ (1,527)	\$ 23,414
Bond Counsel		\$ -	\$ -	\$ -	\$ -
Bond Issuance Cost		\$ 625,293	\$ 625,293	\$ 0	\$ 625,293
Builders Risk Insurance		\$ -	\$ -	\$ -	\$ -
Project Management	12	\$ -	\$ 4,229,760	\$ (260,896)	\$ 3,968,864
Reimbursable Expenses	11	\$ -	\$ 311,211	\$ 356	\$ 311,567
Communications	11	\$ -	\$ 199,367	\$ (6,095)	\$ 193,272
Sustainability		\$ -	\$ -	\$ -	\$ -
Criminal Background Checks	10,11	\$ -	\$ 10,915	\$ 1,168	\$ 12,083
Printing & Plan Distribution	10	\$ -	\$ 779	\$ -	\$ 779
Miscellaneous Fees (Bank, consulting)	11	\$ -	\$ 386,093	\$ (80,444)	\$ 305,649
Ashland SD Staff	11,12	\$ -	\$ 1,125,846	\$ (268,210)	\$ 857,636
Lincoln Elementary		\$ -	\$ 42,354	\$ 446	\$ 42,800
District Wide Roofing Project		\$ -	\$ 46,200	\$ -	\$ 46,200
Sub Total Soft Cost		\$ 625,293	\$ 7,002,759	\$ (615,202)	\$ 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
JUNE 30, 2024**

Project Expense		Original Budget		Paid to Date		Remaining Balance		Revised Budget
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	\$	-	\$	0	\$	0
Inflation		\$ 258,837	\$	-	\$	-	\$	-
Sub Total Soft Cost		\$ 1,264,057	\$	-	\$	0	\$	0
Total Project Cost		\$ 4,572,762	\$	-	\$	0	\$	0

1. Reallocated \$750,000 to AHS (07.31.21)
1. Reallocated \$641,400 to AHS (07.31.21)
1. Reallocated \$1,100,040 to AMS (07.31.21)
2. Reallocated \$ 684,164 to AHS (09.30.21)
3. Reallocated Bond Issuance Costs back to Program Level (06.30.22)



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
DW SECURITY BUDGET
JUNE 30, 2024**

Project Expense		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Hard Cost					
Maximum Allowable Construction Cost (MACC)	10	\$ 2,850,000	\$ 293,567	\$ 13,375	\$ 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	\$ 293,567	\$ 150,582	\$ 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	\$ 293,567	\$ 503,367	\$ 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
JUNE 30, 2024**

Project Expense		Original Budget		Paid to Date		Remaining Balance		Revised Budget
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
JUNE 30, 2024**

Project Expense	Original Budget	Paid to Date	Remaining Balance	Revised Budget
Hard Cost				
Maximum Allowable Construction Cost (MACC) 8/9	\$ 3,420,000	\$ 3,534,881	\$ (135,657)	\$ 3,399,224
Asbestos	\$ -	\$ -	\$ -	\$ -
Seismic Retro Upgrade	\$ -	\$ -	\$ -	\$ -
1.5% Solar (Total Project Major Building)	\$ -	\$ -	\$ -	\$ -
Construction Contingency	\$ 180,000	\$ -	\$ -	\$ -
Construction Sub Total	\$ 3,600,000	\$ 3,534,881	\$ (135,657)	\$ 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	\$ 1,200	\$ 477	\$ 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	\$ 1,200	\$ 477	\$ 1,677
Total Project Cost	\$ 4,479,772	\$ 3,536,081	\$ (135,180)	\$ 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
JUNE 30, 2024**

Project Expense		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Hard Cost					
Maximum Allowable Construction Cost (MACC)	8,10	\$ -	\$ 559,844	\$ 1	\$ 559,845
Asbestos		\$ -	\$ -	\$ -	\$ -
Seismic Retro Upgrade		\$ -	\$ -	\$ -	\$ -
1.5% Solar (Total Project Major Building)		\$ -	\$ -	\$ -	\$ -
Construction Contingency	8,10	\$ -	\$ -	\$ 1,652	\$ 1,652
Construction Sub Total		\$ -	\$ 559,844	\$ 1,653	\$ 561,497
Soft Cost					
Administrative Cost					
Legal Fees		\$ -	\$ -	\$ -	\$ -
Bond Counsel		\$ -	\$ -	\$ -	\$ -
Bond Issuance Cost		\$ -	\$ -	\$ -	\$ -
Builders Risk Insurance		\$ -	\$ -	\$ -	\$ -
Project Management		\$ -	\$ -	\$ -	\$ -
Reimbursable Expenses		\$ -	\$ -	\$ -	\$ -
Communications		\$ -	\$ -	\$ -	\$ -
Sustainability		\$ -	\$ -	\$ -	\$ -
Site Cost					
Site Survey		\$ -	\$ -	\$ -	\$ -
Geo-Tech Report		\$ -	\$ -	\$ -	\$ -
Planning Cost					
Design Fees		\$ -	\$ 32,860	\$ -	\$ 32,860
A & E Reimbursable Expenses		\$ -	\$ -	\$ -	\$ -
Commissioning		\$ -	\$ 19,501	\$ 499	\$ 20,000
Printing & Plan Distribution		\$ -	\$ -	\$ -	\$ -
Hazardous Materials Consultant	10	\$ -	\$ 8,850	\$ 0	\$ 8,850
Construction Testing		\$ -	\$ -	\$ -	\$ -
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
JUNE 30, 2024**

Project Expense		Original Budget	Paid to Date	Remaining Balance	Revised Budget
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	\$ -	\$ 1,221,255	\$ 68,385	\$ 1,289,640
Construction Contingency	6	\$ -	\$ -	\$ 144,186	\$ 144,186
Construction Sub Total		\$ -	\$ 1,574,134	\$ 267,334	\$ 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	\$ -	\$ 52,142	\$ (3,449)	\$ 48,693
A & E Reimbursable Expenses		\$ -	\$ -	\$ 5,000	\$ 5,000
Commissioning	4,7	\$ -	\$ 136,432	\$ (13,432)	\$ 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		\$ -	\$ 17,836	\$ 1,164	\$ 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		\$ -	\$ 222,133	\$ 13,243	\$ 235,376
Total Project Cost		\$ -	\$ 1,796,267	\$ 280,577	\$ 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
JUNE 30, 2024**

Project Expense		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Hard Cost					
Maximum Allowable Construction Cost (MACC)		\$ -	\$ 653,092	\$ 0	\$ 653,092
Security Fencing	7,10	\$ -	\$ 23,890	\$ -	\$ 23,890
Seismic Retro Upgrade		\$ -	\$ -	\$ -	\$ -
1.5% Solar (Total Project Major Building)		\$ -	\$ -	\$ -	\$ -
Construction Contingency	10	\$ -	\$ -	\$ 17,724	\$ 17,724
Construction Sub Total		\$ -	\$ 676,982	\$ 17,724	\$ 694,706
Soft Cost					
Administrative Cost					
Legal Fees		\$ -	\$ -	\$ -	\$ -
Bond Counsel		\$ -	\$ -	\$ -	\$ -
Bond Issuance Cost		\$ -	\$ -	\$ -	\$ -
Builders Risk Insurance		\$ -	\$ -	\$ -	\$ -
Project Management		\$ -	\$ -	\$ -	\$ -
Reimbursable Expenses		\$ -	\$ -	\$ -	\$ -
Communications		\$ -	\$ -	\$ -	\$ -
Sustainability		\$ -	\$ -	\$ -	\$ -
Site Cost					
Site Survey		\$ -	\$ -	\$ -	\$ -
Geo-Tech Report		\$ -	\$ -	\$ -	\$ -
Planning Cost					
Design Fees	6	\$ -	\$ 28,850	\$ 155	\$ 29,005
A & E Reimbursable Expenses		\$ -	\$ -	\$ 5,000	\$ 5,000
Commissioning		\$ -	\$ 22,501	\$ 2,499	\$ 25,000
Printing & Plan Distribution		\$ -	\$ -	\$ -	\$ -
Hazardous Materials Consultant		\$ -	\$ 7,500	\$ -	\$ 7,500
Construction Testing		\$ -	\$ -	\$ -	\$ -
Constructability Review		\$ -	\$ -	\$ -	\$ -
Plan Review & Building Permits	8	\$ -	\$ 34,313	\$ 197	\$ 34,510
Special Inspection and Testing		\$ -	\$ -	\$ -	\$ -
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
JUNE 30, 2024**

Project Expense		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Hard Cost					
Maximum Allowable Construction Cost (MACC)	13	\$ 10,576,000	\$ 15,357,996	\$ (222,925)	\$ 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	\$ 15,357,996	\$ (222,925)	\$ 15,135,071
Soft Cost					
Administrative Cost					
Legal Fees		\$ 15,000	\$ -	\$ -	\$ -
Bond Counsel		\$ -	\$ -	\$ -	\$ -
Bond Issuance Cost		\$ -	\$ -	\$ -	\$ -
Builders Risk Insurance		\$ -	\$ 10,869	\$ 131	\$ 11,000
Project Management		\$ 338,823	\$ -	\$ -	\$ -
Reimbursable Expenses		\$ 22,588	\$ -	\$ -	\$ -
Communications		\$ -	\$ -	\$ -	\$ -
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	\$ 18,293,669	\$ (162,832)	\$ 18,130,837

- 12. ReAllocated within Budget (09.30.22)
- 13. ReAllocated within Budget (01.31.23)
- 14. Costs were recategorized (04.30.23)



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
ASHLAND MIDDLE SCHOOL BUDGET
JUNE 30, 2024**

Project Expense		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Hard Cost					
Maximum Allowable Construction Cost (MACC)	18	\$ 20,500,000	\$ 35,732,695	\$ (285,320)	\$ 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	\$ 35,732,695	\$ (285,319)	\$ 35,447,376
Soft Cost					
Administrative Cost					
Legal Fees		\$ 20,000	\$ -	\$ -	\$ -
Bond Counsel		\$ -	\$ -	\$ -	\$ -
Bond Issuance Cost		\$ -	\$ -	\$ -	\$ -
Builders Risk Insurance		\$ -	\$ -	\$ -	\$ -
Project Management		\$ 658,808	\$ -	\$ -	\$ -
Reimbursable Expenses		\$ 43,921	\$ -	\$ -	\$ -
Communications		\$ -	\$ -	\$ -	\$ -
Sustainability		\$ -	\$ -	\$ -	\$ -
Site Cost					
Site Survey	17	\$ 43,921	\$ 24,226	\$ 690	\$ 24,916
Geo-Tech Report		\$ 43,921	\$ 37,264	\$ 2,736	\$ 40,000
Planning Cost					
Design Fees		\$ 2,196,027	\$ 2,350,794	\$ 91,896	\$ 2,442,690
A & E Reimbursable Expenses		\$ 43,921	\$ 34,400	\$ 35,600	\$ 70,000
Commissioning		\$ 87,841	\$ 53,220	\$ -	\$ 53,220
Printing & Plan Distribution		\$ 15,372	\$ -	\$ -	\$ -
Hazardous Materials Consultant		\$ 87,841	\$ 149,293	\$ 2,057	\$ 151,350
Construction Testing		\$ -	\$ -	\$ -	\$ -
Constructability Review		\$ 65,881	\$ 88,403	\$ -	\$ 88,403
Plan Review & Building Permits		\$ 219,603	\$ 1,127,525	\$ 186	\$ 1,127,711
Special Inspection and Testing		\$ 153,722	\$ 115,193	\$ 3,749	\$ 118,942
Miscellaneous Fees	17	\$ 87,841	\$ 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	\$ 5,496,069	\$ 126,949	\$ 5,623,017
Total Project Cost		\$ 31,990,635	\$ 41,228,764	\$ (158,371)	\$ 41,070,393

15. Reallocated within Budget (01.31.23)
 16. Reallocated \$26k from Security (03.31.23)
 17. Reallocated within Budget (05.31.23)
 18. Reallocated from Investment Inc (06.30.23)



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
ASHLAND HIGH SCHOOL BUDGET
JUNE 30, 2024**

Project Expense		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Hard Cost					
Phase II: HVAC		\$ -	\$ 8,353,060	\$ 1,706,940	\$ 10,060,000
Maximum Allowable Construction Cost (MACC)		\$ 8,544,000	\$ 2,583,345	\$ 11,258,655	\$ 13,842,000
Asbestos		\$ 152,889	\$ -	\$ 152,889	\$ 152,889
Seismic Retro Upgrade	13	\$ -	\$ -	\$ 2,500,000	\$ 2,500,000
1.5% Solar (Total Project Major Building)		\$ -	\$ -	\$ -	\$ -
Construction Contingency	13	\$ 427,200	\$ -	\$ 1,062,200	\$ 1,062,200
Construction Sub Total		\$ 9,124,089	\$ 10,936,405	\$ 16,680,684	\$ 27,617,089
Soft Cost					
Administrative Cost					
Legal Fees		\$ 15,000	\$ 1,148	\$ (1,148)	\$ -
Bond Counsel		\$ -	\$ -	\$ -	\$ -
Bond Issuance Cost		\$ -	\$ -	\$ -	\$ -
Builders Risk Insurance		\$ -	\$ -	\$ -	\$ -
Project Management	18	\$ 273,723	\$ 244,307	\$ (204,307)	\$ 40,000
Reimbursable Expenses	17	\$ 18,248	\$ 17,545	\$ (2,145)	\$ 15,400
Communications		\$ -	\$ -	\$ -	\$ -
Sustainability		\$ -	\$ -	\$ -	\$ -
Site Cost					
Site Survey		\$ 27,372	\$ 50,572	\$ -	\$ 50,572
Geo-Tech Report		\$ 27,372	\$ 36,465	\$ (393)	\$ 36,072
Planning Cost					
Design Fees	19	\$ 912,409	\$ 2,441,891	\$ (365,359)	\$ 2,076,532
A & E Reimbursable Expenses		\$ 18,248	\$ 334	\$ 17,914	\$ 18,248
Commissioning		\$ -	\$ -	\$ -	\$ -
Printing & Plan Distribution		\$ 2,000	\$ -	\$ -	\$ -
Hazardous Materials Consultant		\$ 45,620	\$ 114,695	\$ (67,075)	\$ 47,620
Construction Testing		\$ -	\$ -	\$ -	\$ -
Constructability Review		\$ 45,620	\$ 334,600	\$ 0	\$ 334,600
Plan Review & Building Permits		\$ 91,241	\$ 414,638	\$ 228,332	\$ 642,970
Special Inspection and Testing		\$ 45,620	\$ 251,111	\$ (149,491)	\$ 101,620
Miscellaneous Fees	19	\$ 36,496	\$ 123,587	\$ (38,783)	\$ 84,804
Ed Specs		\$ -	\$ -	\$ -	\$ -
Kitchen		\$ -	\$ -	\$ -	\$ -
Miscellaneous					
Legal Advertisements		\$ 2,000	\$ -	\$ 2,000	\$ 2,000
Furniture, Fixtures, and Equipment (FF&E)		\$ 456,204	\$ 40,877	\$ 59,123	\$ 100,000
Technology		\$ 91,241	\$ 131,075	\$ 219	\$ 131,294
Technology (Design)		\$ 45,620	\$ -	\$ 36,298	\$ 36,298
Acoustics		\$ 13,686	\$ -	\$ -	\$ -
Criminal Background Checks		\$ 1,500	\$ -	\$ -	\$ -
System Development Charges		\$ -	\$ -	\$ -	\$ -
Value Engineering		\$ -	\$ -	\$ -	\$ -
Utility Connection Fee		\$ -	\$ -	\$ -	\$ -
Unallocated Owner Contingency	17,18	\$ 1,140,511	\$ -	\$ 1,262	\$ 1,262
Inflation	19	\$ 746,029	\$ -	\$ -	\$ -
Sub Total Soft Cost		\$ 4,055,760	\$ 4,202,335	\$ (483,551)	\$ 3,719,292
Total Project Cost		\$ 13,179,849	\$ 14,958,240	\$ 16,197,133	\$ 31,336,381

14. Reallocated within Budget (10.31.22)
 15. Reallocated within Budget (01.31.23)
 16. Reallocated within Budget (02.28.23)
 17. Reallocated within Budget (03.31.23)
 18. Reallocated within Budget (06.30.23)



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
WALKER ELEMENTARY SCHOOL BUDGET
JUNE 30, 2024**

Project Expense		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Hard Cost					
Maximum Allowable Construction Cost (MACC)	15	\$ 8,533,000	\$ 26,541,292	\$ 485,399	\$ 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	\$ 29,842,246	\$ 375,290	\$ 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	\$ 411,836	\$ (125,686)	\$ 286,150
Ed Specs		\$ 18,004	\$ -	\$ -	\$ -
Kitchen		\$ -	\$ -	\$ -	\$ -
Miscellaneous					
Legal Advertisements		\$ 2,000	\$ -	\$ -	\$ -
Furniture, Fixtures, and Equipment (FF&E)	14	\$ 450,109	\$ 866,902	\$ 4,998	\$ 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	\$ -	\$ (0)	\$ (0)
Inflation		\$ 746,863	\$ -	\$ -	\$ -
Sub Total Soft Cost		\$ 4,442,393	\$ 4,975,350	\$ (160,150)	\$ 4,815,200
Total Project Cost		\$ 15,694,578	\$ 34,817,597	\$ 215,140	\$ 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
WILLOW WIND LEARNING CENTER
JUNE 30, 2024**

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
JUNE 30, 2024**

Project Expense	Original Budget	Paid to Date	Remaining Balance	Revised Budget
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 \$ -	\$ 396,652	\$ 21,748	\$ 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	\$ -	\$ 927,432	\$ 723,366	\$ 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 \$ -	\$ 69,600	\$ -	\$ 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	\$ -	\$ 128,516	\$ 3,084	\$ 131,600
Total Project Cost	\$ -	\$ 1,055,948	\$ 726,450	\$ 1,782,398

1. ReAllocated from Investment Inc (09.30.22)
2. ReAllocated within Budget (09.30.22)
3. ReAllocated within Budget (04.30.23)
4. ReAllocated within Budget (06.30.23)

**Ashland School District
Summary Financial Activity - General Fund**

GENERAL FUND REVENUES	2023/2024 - Proj	
		Change from prior estimate
District Controlled Revenues	7,300,000	\$325k decrease in other estimated revenues
State School Fund Formula	30,971,000	\$300k increase in SSF from FY23 rebalancing
Total Revenues	\$ 38,271,000	
GENERAL FUND EXPENSES		
Staff - Payroll and Benefits	34,149,000	\$315k increase, hours, leave payoffs, etc
Non-Staff Expenses	6,486,000	\$265k increase, June spending, Pcards, etc
Total Expenses	\$ 40,635,000	
Operating Gain/(Loss)	\$ (2,364,000)	
Beginning Fund Balance	2,089,452	\$236k reduction. Adjustment from finalizing FY23 Audit. Specifically the prior year restatement entries
Ending Fund Balance	\$ (274,548)	

Note: Property tax revenues are still being accrued through August. These amounts are included as an estimate in the School Fund Formula above. The final amount won't be determined until the end of this month and then a final auditing entry later in the year to balance to the county assessment amount.



Watch for information coming soon for a **Policy Update webinar.**

Summer Board Conference

August 9–11, 2024
Salem, OR

Annual Convention

Nov. 7-9, 2024
Portland, OR

CONTENTS

- AC – Nondiscrimination, Required
- BBF – Board Member Standards of Conduct (*Version 1 or 2*), Highly Recommended
- BBFC – Reporting of Suspected Abuse of a Child, Optional
- BCBA – Student Representative(s) on the Board, Optional
- BCBA-AR – Student Representative(s) on the Board, Optional, *New*
- CB – Superintendent, Highly Recommended
- CBC – Superintendent’s Contract, Optional
- CBG – Evaluation of the Superintendent, Required
- CCG – Evaluation of Administrators, Required
- DJC - Bidding Requirements (*Versions 1 & 2*), Delete
- DJC - Bidding Requirements, Highly recommended, *New*
- DJC-AR – Exemptions from Competitive Bidding and Special Procurements, Delete
- DJC-AR – Exemptions from Competitive Bidding and Special Procurements, Optional, *New*
- DJCA – Personal Service Contracts, Delete
- DJCA-AR – Personal Service Contracts, Delete
- EBBA – First Aid**, Delete
- EBBA – Student Health Services**, Highly Recommended, *New*
- EBBA-AR – First Aid - Infection Control, Delete
- EBBAA – Infection Control and Bloodborne Pathogens, Optional
- EBBB – Injury or Illness Reports, Required
- EBC – Emergency Plan and First Aid**, Highly Recommended, *New*
- EBC/EBCA – Emergency Procedures and Disaster Plans, Delete
- EBCA – Safety Threats**, Required, *New*
- EBCB – Emergency Procedure Drills and Instruction, Highly Recommended
- GBEB – Communicable Diseases in Schools, Highly Recommended
- GBEB-AR – Communicable Diseases in Schools, Highly Recommended
- GBEBA – Staff – HIV, AIDS, and HBV, Delete
- GBN/JBA – Sexual Harassment, Required
- GBNAB/JHFE – Suspected Abuse of a Child Reporting Requirements**, Required
- GBNAB/JHFE-AR(1) – Reporting of Suspected Abuse of a Child, Required
- GBNAB/JHFE-AR(2) – Abuse of a Child Investigations Conducted on District Premises, Highly Recommended, (no updates)
- GCDA/GDDA – Criminal Records Checks and Fingerprinting *, Delete
- GCDA/GDDA – Criminal Records Checks and Fingerprinting *, Required, *New*
- GCDA/GDDA-AR – Criminal Records Checks and Fingerprinting, Delete
- IGBAF – Special Education – Individualized Education Program (IEP)**, Required
- IGBAF-AR – Special Education: Individualized Education Program (IEP)**/*, Required

Policy Update is a subscription publication of the Oregon School Boards Association

Emielle Nischik

Acting Executive Director

Haley Percell

Interim Deputy Executive Director, Chief Legal Officer

Michael Miller

Interim Director of Legal Services

Amy Williams, Attorney

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Callen Sterling, Attorney

Brian Kernan, Attorney

Kara Parker, Attorney

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Jean Chiappisi

Policy Services Assistant

If you have questions regarding this publication or OSBA, please call our offices:

503-588-2800 or 800-578-6722

This publication is designed to provide accurate and authoritative information regarding the subject matter covered. It is furnished with the understanding that policies should be reviewed by the district’s legal counsel.

IGBAG – Special Education – Procedural Safeguards**, Required
JBA/GBN – Sexual Harassment, Required
JBAA – Section 504 – Students**, *Version 1 and 2*, Highly Recommended
JBAA-AR – Section 504 – Students**/*, Highly Recommended
JEA – Compulsory Attendance**, Highly Recommended
JEA-AR – Compulsory Attendance Notices[and Citations]**, Highly Recommended
JGA – Corporal Punishment**, Optional
JGAB – Use of Restraint or Seclusion**, Required
JGAB-AR – Use of Restraint or Seclusion**, Required
JH – Student Welfare**, Optional
JHC – Student Health Services and Requirements**, Delete (in lieu of new EBBA)
JHCA/JHCB – Immunization and School Sports Participation**, Highly Recommended
JHCC – Communicable Diseases - Students, Delete
JHCC-AR – Communicable Diseases - Students, Delete
JHCCA – Students - HIV, HBV and AIDS**, Delete
JHCCF – Pediculosis (Head Lice), *Version 1*, Delete
JHCCF – Pediculosis (Head Lice), *Version 2*, Delete
JHCCF – Pediculosis (Head Lice), was *Version 3*, now stand-alone, Optional
JHCCF-AR – Pediculosis (Head Lice), *Version 1*, Delete
JHCCF-AR – Pediculosis (Head Lice), *Version 2*, Delete
JHFE/GBNAB – Suspected Abuse of a Child Reporting Requirements**, Required
JHFE/GBNAB-AR(1) – Reporting of Suspected Abuse of a Child, Required
JHFE/GBNAB-AR(2) – Abuse of a Child Investigations Conducted on District Premises,
Highly Recommended, (no updates)
KBA-AR – Public Records Request, Highly Recommended

CIVIL RIGHTS COORDINATOR

Summary

[House Bill 2281](#) (2023), effective January 1, 2024, requires a district school board to designate one or more civil rights coordinators for the district. According to HB 2281, the civil rights coordinator may be an employee of the district or the district may contract with an ESD for the services of a civil rights coordinator.

HB 2281, Section 1 (see page 2 of the bill specifically) outlines the minimum responsibilities of a civil rights coordinator. Of note is the requirement to comply with rules adopted by the State Board of Education so OSBA is watching for news about these rules. Additionally, the bill includes use of the term “discrimination” which is defined further by ORS 659.850 and is used in the new bill. The bill further outlines a requirement for the Department of Education to make training available annually for these coordinators.

Finally, ORS 659.855, which allows the Superintendent of Public Instruction to sanction a public elementary or secondary school program if found in noncompliance with ORS 659.850 and 659.852, has been updated to include noncompliance with ORS 332.505(2) – Civil Rights Coordinator.

The bill can be read in its entirety with the link provided above.

There is no current requirement for language to be added to board policy or administrative regulation. The district may choose to add the proposed language to policy AC – Nondiscrimination. Oregon Administrative Rules from the Oregon State Board of Education are anticipated later this year, which will likely prompt another update to policy.

The district should consider posting notice of the designated civil rights coordinator and contact information together with the notice of nondiscrimination (and other notices) on the district’s website.

Collective Bargaining Impact

None

Local District Responsibility

Review the recommendations for policy changes and present them to the board for adoption.

Policy(ies) and AR(s) Impacted by these Revisions

AC – Nondiscrimination, Required

STUDENT REPRESENTATIVE(S) ON THE BOARD

Summary

The practice of installing student representative(s) on local school boards has increased, and therefore a desire for more policy and administrative regulation options has been voiced. OSBA policy services staff present the model policy and administrative regulation published herein as options for establishing a student representative on a local school board. Oregon does not mandate a student representative, it is up to local decision makers.

Collective Bargaining Impact

None

Local District Responsibility

Review the proposed policy and/or administrative regulation to determine whether it is appropriate for the board. The policy requires adoption by the board to enact and the administrative regulation may be submitted to the board for their review. A policy and administrative regulation is recommended, although not required.

Policy(ies) and ARs Impacted by these Revisions

BCBA – Student Representative(s) on the Board, Optional
BCBA-AR – Student Representative(s) on the Board, Optional, *New*

SUPERINTENDENT’S CONTRACT

Summary

With the passage of [Senate Bill 283](#) (2023), the law was revised regarding superintendent contracts to remove mention of laws relevant to education service district boards added by Senate Bill 1521 in 2022 to ORS 332.505.

Collective Bargaining Impact

None

Local District Responsibility

Update policies with the recommended revisions if they are present in the board’s policy manual and submit to the board for re adoption.

Policy(ies) and ARs Impacted by these Revisions

CB – Superintendent, Highly Recommended

CBC – Superintendent’s Contract, Optional

EVALUATION OF THE SUPERINTENDENT AND ADMINISTRATOR(S)

Summary

There are not significant changes to policy on evaluation of the superintendent and administrators. However, it has been included in this update as a reminder to the board to review policy on evaluation of the superintendent to ensure current practice and contract language align, and for the superintendent to review administrator contract language with the same lens. If needed, revise policy language if different terms now apply.

Collective Bargaining Impact

None

Local District Responsibility

If the board has adopted a version of required policy CBG – Evaluation of the Superintendent or CCG – Evaluation of Administrators (as listed herein), take time to review the superintendent and administrator contracts to ensure there is not conflicting language adopted in board policy regarding the regularity of an evaluation. Revise board policy as needed and readopt.

Policy(ies) and ARs Impacted by these Revisions

CBG – Evaluation of the Superintendent, Required

CCG – Evaluation of Administrators, Required

PROCUREMENTS

Summary

OSBA recommends deleting the current versions of DJC – Bidding Requirements, DJC-AR – Exemptions from Competitive Bidding and Special Procurements, DJCA – Personal Service Contracts and DJCA-AR – Personal Service Contracts, and replacing them with the new proposed versions of DJC and DJC-AR. The proposed DJC outlines the procurement requirements for Small Procurement, Intermediate Procurement, Regular Procurement, Emergency Procurement, Sole-Source Procurement and Personal Services Contracts.

Additionally, the proposed policy DJC – Bidding Requirements, reflects the new amounts for the procurement levels passed in House Bill 1047 (2023) and went into effect January 1, 2024. The policy also defines “public improvements” for purposes of the procurement levels, defines “community benefit contract” and the “Construction Manager/General Contractor procurement.”

The proposed administrative regulation, DJC-AR – Exemptions from Competitive Bidding and Special Procurements, has been updated and continues to provide guidance for procurements which are exempt from competitive bidding or are special procurements.

Collective Bargaining Impact

None

Local District Responsibility

Revise and readopt highly recommended policy DJC – Bidding Requirements and consider whether to also add optional DJC-AR – Exemptions from Competitive Bidding and Special Procurements.

Policy(ies) and ARs Impacted by these Revisions

DJC – Bidding Requirements (*Versions 1 & 2*), Delete

DJC – Bidding Requirements, Highly recommended, *New*

DJC-AR – Exemptions from Competitive Bidding and Special Procurements, Delete

DJC-AR – Exemptions from Competitive Bidding and Special Procurements, Optional, *New*

DJCA – Personal Service Contracts, Delete

DJCA-AR – Personal Service Contracts, Delete

HEALTH SERVICES

Summary

The State Board of Education adopted revisions to Oregon Administrative Rule (OAR) 581-022-2220 on health services. The changes result in a requirement to develop “a written prevention-oriented health services plan for all students” (OAR 581-022-2220(1)). The plan requirements include a variety of topics, including but not limited to, plan for health care space, communicable disease prevention, communication strategies, health screenings, and hearing, vision and dental screenings.

As a result of these changes there is a list of policies and administrative regulations (AR’s), included herein, which have been revised. Recommendations may include to delete or rescind policy or AR, recoding, and reassigning some policy content to a new section or policy of the policy manual.

The entire rule can be accessed here: [OAR 581-022-2220](#). Reach out to the Oregon Department of Education with additional questions regarding plan requirements and/or implementation.

ODE [resources](#) and [School Health Services](#) include tools to support some requirements.

Collective Bargaining Impact

Review any terms and conditions of an applicable agreement.

Local District Responsibility

Review the recommendations regarding board policy changes and make decisions regarding same. Any policy revisions or recommendation to rescind a policy should be submitted to the board for action. An AR may be submitted to the board for review for either removing or keeping and revising as recommended.

Policy(ies) and ARs Impacted by these Revisions

EBBA – First Aid**, Delete

EBBA – Student Health Services**, Highly Recommended, *New*

EBBA-AR – First Aid - Infection Control, Delete

EBBAA – Infection Control and Bloodborne Pathogens, Optional

EBBB – Injury or Illness Reports, Required

GBEB – Communicable Diseases in Schools, Highly Recommended

GBEB-AR – Communicable Diseases in Schools, Highly Recommended

GBEBA – Staff – HIV, AIDS, and HBV, Delete

JH – Student Welfare**, Optional

JHC – Student Health Services and Requirements**, Delete (in lieu of new EBBA)

JHCA/JHCB – Immunization and School Sports Participation**, Highly Recommended

JHCC – Communicable Diseases - Students, Delete

JHCC-AR – Communicable Diseases - Students, Delete

JHCCA – Students - HIV, HBV and AIDS**, Delete

EMERGENCY PROCEDURES, FIRST AID and SAFETY THREATS

Summary

[House Bill 3584](#) was passed in the 2023 legislative session. The bill requires districts to adopt policy language about using electronic communication to notify parents, guardians and employees within 24 hours of a safety threat action that was not a drill. The bill states the communication should be “provided in a manner that communicates relevant facts and details as necessary and useful.” (HB 3584, Section 1., (3)(b)) More detail can be found by reading the entire bill.

This update includes a revision of other policies identified herein, resulting from recommendations on reorganization and may include recoding and/or reassigning content to a different policy or policy section.

Collective Bargaining Impact

None

District Responsibility

Review the recommendations regarding board policy changes and make decisions regarding new and updated policy. Any policy revisions, additions or recommendation to rescind a policy should be submitted to the board for action.

Policy(ies) and ARs Impacted by these Revisions

EBC/EBCA – Emergency Procedures and Disaster Plans, Delete

EBC – Emergency Plan and First Aid**, Highly Recommended, *New*

EBCA – Safety Threats**, Required, *New*

EBCB – Emergency Procedure Drills and Instruction, Highly Recommended

SEXUAL HARASSMENT DEFINITION

Summary

House Bill 2280 (2023 Legislature) modified the definition of sexual harassment affecting schools and has since been followed up with new rule revisions. The revised definition changes the meaning of assault within the sexual harassment context and adds a section describing the meaning of “without consent,” which is also a new definition added to the law. When considering these recommended revisions, please review the designated names and positions listed for receiving such reports and amend as needed.

Collective Bargaining Impact

None

Local District Responsibility

Review recommended changes and board-adopt revisions to required policy GBN/JBA (JBA/GBN) – Sexual Harassment, in the board’s policy manual.

Policy(ies) and ARs Impacted by these Revisions

GBN/JBA – Sexual Harassment, Required

JBA/GBN – Sexual Harassment, Required

REPORTING CHILD ABUSE

Summary

The Oregon Department of Human Services (DHS) reports the purpose of Senate Bill 231 (2023) was to align state law with the agency’s current process for receiving child abuse reporting, through a centralized child abuse reporting system established by DHS. Reports must still be submitted to DHS as directed or to a law enforcement agency.

The form found in **GBNAB/JHFE-AR(2) (JHFE/GBNAB-AR(2))** – Abuse of a Child Investigations Conducted on District Premises, is included for convenience and reference; **no updates were made.**

Collective Bargaining Impact

None

Local District Responsibility

The district should recommend board adoption of revised policy and reissue an updated administrative regulation to the board for review.

Policy(ies) and ARs Impacted by these Revisions

BBF – Board Member Standards of Conduct (*Version 1 or 2*), Highly Recommended
BBFC – Reporting of Suspected Abuse of a Child, Optional
GBNAB/JHFE – Suspected Abuse of a Child Reporting Requirements**, Required
GBNAB/JHFE-AR(1) – Reporting of Suspected Abuse of a Child, Required
GBNAB/JHFE-AR(2) – Abuse of a Child Investigations Conducted on District Premises, Highly Recommended, (no updates)
JHFE/GBNAB – Suspected Abuse of a Child Reporting Requirements**, Required
JHFE/GBNAB-AR(1) – Reporting of Suspected Abuse of a Child, Required
JHFE/GBNAB-AR(2) – Abuse of a Child Investigations Conducted on District Premises, Highly Recommended, (no updates)

FINGERPRINTING

Summary

Newly revised rules regarding fingerprint collection offer the addition of a statewide vendor identified by DAS as an authorized fingerprint collector and removed the option for volunteers to appeal to ODE on a fitness determination issued by ODE. The other resulting changes come from a decision to have a stand-alone board policy.

Collective Bargaining Impact

None

Local District Responsibility

Review the recommended changes and issue them to the board for re adoption. To clean up duplicate language, a new version of model policy GCDA/GDDA – Criminal Records Checks and Fingerprinting * has been developed and eliminates the need for an administrative regulation. Consider a complete delete/rescind of the old policy version and adopt the revised version to implement new policy language for GCDA/GDDA, before adopting, refer to the board’s existing version for direction on choosing brackets in the new version; make changes to reflect current practices as needed.

Policy(ies) and ARs Impacted by these Revisions

GCDA/GDDA – Criminal Records Checks and Fingerprinting *, Delete
GCDA/GDDA – Criminal Records Checks and Fingerprinting *, Required, *New*
GCDA/GDDA-AR – Criminal Records Checks and Fingerprinting, Delete

SPECIAL EDUCATION and ABBREVIATED SCHOOL DAY

Summary

Board policy IGBAG – Special Education – Procedural Safeguards** and administrative regulations IGBAF-AR – Special Education – Individualized Education Program (IEP)**/* and JBAA-AR – Section 504 – Students**/* are being updated.

Changes in IGBAF-AR – Special Education: Individualized Education Program (IEP)**/* and JBAA-AR – Section 504 – Students**/* are due to the passage of Senate Bill 756 (2023) which requires district employees who are assigned to work with students who are on an IEP or 504 Plan, be invited to attend the student’s IEP meeting or 504 Plan meeting. The section

of the administrative regulation (AR) “Individualized COVID-19 Recovery Services” is deleted since the provision has sunset (see OAR 581-015-2229). IGBAF-AR is also updated to include information regarding abbreviated school days.

Changes in Board policy IGBAG are due to the passage of SB 758 (2023) to add language to the Independent Educational Evaluations section stating parents are entitled to examine their student’s record pertaining to identification, evaluation and educational placement, and the provisions of a free appropriate public education (FAPE) and setting a 10 business day timeline.

The legal references to IGBAF – Special Education – Individualized Education Program (IEP**) and JBAA – Section 504 – Students** (version 1 and 2) are updated to add references to the new laws.

Collective Bargaining Impact

Consider impact of requirement that certain staff be allowed to attend IEP and 504 meetings and be compensated for attendance.

District Responsibility

Revise and readopt required Board policy IGBAG – Special Education – Procedural Safeguards**; revise required administrative regulations IGBAF-AR – Special Education – Individualized Education Program (IEP)**/* and JBAA-AR – Section 504 – Students**/* if present in the board’s policy manual. Also, update the legal references to IGBAF – Special Education – Individualized Education Program (IEP)** and JBAA – Section 504 – Students** as noted in the documents attached.

Policy(ies) and ARs Impacted by these Revisions

IGBAF – Special Education – Individualized Education Program (IEP)**, Required
IGBAF-AR – Special Education: Individualized Education Program (IEP)**/*, Required
IGBAG – Special Education – Procedural Safeguards**, Required
JBAA – Section 504 – Students**, *Version 1 and 2*, Highly Recommended
JBAA-AR – Section 504 – Students**/*, Highly Recommended

COMPULSORY ATTENDANCE AND HOMESCHOOL REQUIREMENTS

Summary

School districts are still required to monitor for nonenrollment and irregular attendance issues and to send related notices in accordance with ORS 339.080, however, as the Oregon Department of Education has recently noticed, citations for compulsory attendance are no longer issued.

However, after collaboration with their ESD about which entity will be responsible for tracking whether any students who are homeschooled have registered with the ESD or are complying with ORS 339.035, a district may choose to issue a citation. After discussion with the ESD, if the district will be responsible for tracking such students, the district may choose to add bracketed language in JEA-AR – Compulsory Attendance Notices[and Citations]**, regarding their actions concerning citations related to violation of homeschool statute (ORS 339.035) for registration and testing. A school district or ESD superintendent may issue a citation for violations of ORS 339.035. Before doing so, there must be specific notice given, as provided by law, and proposed model language is included in JEA-AR.

Additionally, a violation of compulsory attendance law is no longer a Class C violation, however violation of ORS 163.577 (1)(c) (failing to supervise a child) is still a Class A violation.

The model policy and administrative regulation have been revised and updated to reflect changes.

ODE staff anticipates some upcoming changes to the Uniform Citation Form and will communicate as soon as it is available.

Collective Bargaining Impact

None

Local District Responsibility

If the district has highly recommended policy JEA – Compulsory Attendance**, review and adopt revised and updated language resulting from changes to rules, and suggested revisions to highly recommended JEA-AR – Compulsory Attendance Notices[and Citations]** may be made and issued to the board for review.

Policy(ies) and ARs Impacted by these Revisions

JEA – Compulsory Attendance**, Highly Recommended

JEA-AR – Compulsory Attendance Notices[and Citations]**, Highly Recommended

RESTRAINT OR SECLUSION RECORD AND CORPORAL PUNISHMENT

Summary

The procedures for responding to an incident of restraint or seclusion are found in ORS 339.294 and were amended by [Senate Bill 1024](#) (2023; see Section 3 which begins on page 5 of the SB). These amended procedures are represented in the recommended changes to model administrative regulation, JGAB-AR – Use of Restraint or Seclusion** and policy JGAB – Use of Restraint or Seclusion**. There are several changes to highlight of which two are: 1) addition of immediate notice to the parent or guardian of any existing record, including audio or video, of the incident (which will be preserved in the original format without alternation), and 2) such record shall be reviewed at the debriefing meeting, to which parents shall be invited.

Additional information regarding the preservation and disclosure of such records, which have record retention and disclosure implications, are outlined in the new [SB](#), subsection 9 and 10.

The changes are a result of the adopted language from the bill and related, revised OARs recently adopted by the State Board.

A change to ORS 161.205 on issues of corporal punishment was put into effect by Senate Bill 577; also effective now.

Collective Bargaining Impact

None

Local District Responsibility

The district's responsibility is to update the current board policies and administrative regulation (AR) and comply with the new procedural requirements related to incidents of use of restraint or seclusion. The revised AR should be implemented and submitted to the board for review; recommended policy revisions should be submitted to the board for review and readoption.

Policy(ies) and ARs Impacted by these Revisions

JGA – Corporal Punishment**, Optional
JGAB – Use of Restraint or Seclusion**, Required
JGAB-AR – Use of Restraint or Seclusion**, Required

HEAD LICE (PEDICULOSIS)

Summary

Guidance on exclusion of students found with head lice has changed in recent years. There is now a consensus from other agencies, i.e., National Association of School Nursesⁱ, Center for Disease Control and Preventionⁱⁱ, Oregon School Nurses Association, which recommends against excluding students with head lice or nits from the classroom. Additionally, a rule, originally found in an Oregon Health Authority rule (OAR 333-019-0010), which allowed schools to create exclusionary practices for head lice, has since been repealed. Refer to [Communicable Disease Guidance for Schools](#) published by Oregon Health Authority and Oregon Department of Education for instructions on management.

As a result, OSBA is removing versions 1 and 2 of its model policy JHCCF – Pediculosis (Head Lice) and administrative regulations, leaving only what was a third version of the policy JHCCF – Pediculosis (Head Lice), which keeps a student in the classroom. See the *Communicable Disease Guidance for Schools* for more information.

¹ NASN – [Head Lice Management in Schools](#)

¹¹ CDC – [Head Lice Information for Schools](#)

Collective Bargaining Impact

None

Local District Responsibility

Review the district's policy regarding management of head lice, if applicable, and update or rescind.

Policy(ies) and ARs Impacted by these Revisions

JHCCF – Pediculosis (Head Lice), *Version 1*, Delete
JHCCF-AR – Pediculosis (Head Lice), *Version 1*, Delete
JHCCF – Pediculosis (Head Lice), *Version 2*, Delete
JHCCF-AR – Pediculosis (Head Lice), *Version 2*, Delete
JHCCF – Pediculosis (Head Lice), was *Version 3*, now stand-alone, Optional

PUBLIC RECORDS

Summary

The purpose of this summary is to make schools aware of some minor changes to the definition of public records under ORS 192.005, which describes any information generated by the school in course of business “necessary to satisfy the legal, administrative, fiscal, **tribal cultural** or historical policies, requirements or needs of the state agency or political subdivision.” (ORS 192.005 (5) as amended by House Bill 2112 (2023)) Other changes made in ORS 192, specifically 192.050 include updating terminology to how terms are used in today’s public operations, e.g., analog or digital audio and video tape technology changing to **audio or video technology** or **audio recording and video recording**. Additionally, in ORS 192.060, any records made under ORS 192.040 and 192.050 “shall be properly indexed and **filed so as to facilitate access and retrieval.**” (ORS 192.060 as amended by House Bill 2112 (2023)) There are no policy changes resulting from this bill.

However, there are some other implications on appropriate administrative regulation (AR) language which are discussed herein under ‘district’ below.

Collective Bargaining Impact

None

Local District Responsibility

Review the district’s written procedures related to submitting public records requests. If there are separate written procedures made available which name the person or persons, and their address(es), for submitting public records requests, no modifications may be necessary. If the school operates under KBA-AR – Public Records Request, and if the AR does not name the person or persons to which a public records request should be submitted, make the addition using recommended bracketed language included herein and issue a revised AR for implementation and submit to the board for review.

Policy(ies) and ARs Impacted by these Revisions

KBA-AR – Public Records Request, Highly Recommended

ABOUT POLICY UPDATE

Policy Update is a subscription newsletter providing a brief discussion of current policy issues of concern to Oregon school districts, education service districts, community colleges, and public charter schools.

Sample model policies reflecting these issues and changes in state and federal law, if applicable, are part of this newsletter. These samples are offered as a starting point for drafting local policy and may be modified to meet particular local needs. They do not replace district legal counsel advice.

To make the best use of *Policy Update*, we suggest you discuss the various issues it presents and use the sample model policies to determine which policies your district should develop or revise, get ideas for what a policy should contain, and as a starting point for editing, modifying and discussing your district’s policy position.

If you have questions about *Policy Update*, sample policies or policy in general, call OSBA Policy Services, 800-578-6722 or 503-588-2800.

TRY OUR ONLINE POLICY DEMO

OSBA's online policy service has a demo site for districts interested in a public online policy manual. This service saves time, resources and reams of paper. With one centrally located policy manual updated electronically, you have instant access to current district policies.

Go to policy.osba.org and select "Policy Online Demo." The online manual includes a subscription to *Policy Update* and policy manual maintenance service to help keep policies current.

OSBA offers several options. Contact Policy Services to determine the best option for you, 800-578-6722 or 503-588-2800.

ASHLAND SCHOOL DISTRICT

Code: JFCEB
Adopted:

Personal Electronic Devices and Social Media** (Student may possess a personal electronic device with certain restrictions)

Student possession or use of personal electronic devices on district property, in district facilities during the school day and while the student is in attendance at district-sponsored activities may be permitted subject to the limitations set forth in this policy and consistent with any additional school rules as may be established by the principal and approved by the superintendent.

A “personal electronic device” is a device that is capable of electronically communicating, sending, receiving, storing, recording, reproducing and/or displaying information and data.

Personal electronic devices shall be turned off and stored while on school campuses. Devices which have the capability to take photographs or record video or audio shall not be used for such purposes while on district property or while a student is engaged in district-sponsored activities, unless as expressly authorized in advance by the principal or designee. Computers, tablets, iPads or similar devices brought to school will be restricted to academic activities and subject to additional school rules established by the principal and approved by the superintendent.

If the district implements a curriculum that uses technology, students may be allowed to use their own personal electronic devices to access the curriculum with prior permission from school officials. Students who are allowed to use their own devices to access the curriculum will be granted access to any application or electronic materials when they are available to students who do not use their own devices, or provided free of charge to students who do not use their own devices, for curriculum.

A process for responding to a student’s request to use a personal electronic device, including an appeal process if the request is denied, will be provided.

The district will not be liable for personal electronic devices brought to district property and district-sponsored activities.

Students may not use district equipment to access social media websites, while on district property or at district-sponsored activities unless the access is approved by a district representative. The district will not be liable for information or comments posted by students on social media websites.

Exceptions to the prohibitions set forth in this policy may be made for health, safety or emergency reasons with prior principal or designee approval or when use is provided for in a student’s individualized education program (IEP).

Students are subject to disciplinary action up to and including expulsion for using a personal electronic device in any manner that is academically dishonest, illegal or violates the terms of this policy¹. A referral

¹ The taking, disseminating, transferring or sharing of obscene, pornographic or otherwise illegal images or photographs, whether by electronic data transfer or otherwise (commonly called texting, sexting, emailing, etc.) may constitute a crime under R4/17/17 | PH

to law enforcement officials may also be made. Personal electronic devices brought to district property or used in violation of this policy are subject to confiscation and will be released to the student's parent or property owner, as appropriate.

The superintendent shall ensure that the Board's policy and any subsequent school rules developed by building administrators are reviewed and approved in advance to ensure consistency with this policy and that pertinent provisions of policy and school rules are communicated to staff, students and parents through building handbooks and other means.

END OF POLICY

Legal Reference(s):

[ORS 332.107](#)

[ORS 336.840](#)

DRAFT

state and/or federal law. Any person taking, disseminating, transferring or sharing obscene, pornographic or otherwise illegal images or photographs will be reported to law enforcement and/or other appropriate state or federal agencies.

DRAFT

July 30, 2024

VIA EMAIL

JOSEPH.HATTRICK@ASHLAND.K12.OR.US

Joseph Hattrick
Superintendent
Ashland School District
885 Siskiyou Blvd
Ashland, OR 97520

Subject: Agreement for Legal Services

Dear Joseph:

Thank you for asking Miller Nash LLP to provide legal services to Ashland School District (“Ashland SD”). This letter confirms the scope of our engagement as counsel and provides information about our fees, billing information, and other terms that will govern our relationship for this matter and any additional matters that we agree to handle on Ashland SD’s behalf. If the terms below are acceptable, we ask that you return a signed copy of this letter to us. A copy by email is fine.

1. Client; Scope of Representation.

Our client in this matter will be Ashland SD. We will not be representing you personally, other individuals who may be directors, officers, members, managers, or employees of Ashland SD, or entities that may be parents, subsidiaries, or affiliates of Ashland SD.

We will assist Ashland SD by providing general legal services related to Ashland SD’s employees, students and families, and other education and employment-related matters as requested by Ashland SD.

Although our engagement currently includes only the services above, at Ashland SD’s request we would be happy to discuss the possibility of providing additional specific legal services.

Unless otherwise agreed in writing, our engagement does not include providing any advice or legal services relating to Ashland SD's obligations under the Corporate Transparency Act or federal, state, or local tax or securities laws. We expect that Ashland SD will rely on its outside accountants or bookkeeper for tax advice.

We may provide legal advice that affects a business decision, but the services we provide are legal services. The business decisions are yours.

2. Fees and Expenses.

I will have primary responsibility to see that Ashland SD's legal needs are met. Other lawyers in the firm, as well as paralegals, will be part of the team helping with the work.

Our fees are based on the billing rate for each attorney and paralegal devoting time to Ashland SD's matters. Clients occasionally ask us to estimate the amount of fees and costs likely to be charged in a particular matter. These estimates are not guaranteed maximum amounts. The time and effort required will vary from situation to situation. This is especially true in matters involving negotiation, in which factors not within our control often affect the fee.

Our standard billing rates for attorneys currently range from \$390 per hour to \$875 per hour, based on experience level and practice area. Because Ashland SD is a public educational institution, we are willing to provide the following hourly billing rates for our work: My rate is \$555 per hour, however for school and district clients I am able to provide a discounted rate of \$475 per hour. If other attorneys in the firm work on this matter their rates would be as follows: senior partners (with 12 or more years of experience) will be charged at \$475 per hour, junior partners will be charged at \$425 per hour, senior associates (four or more years of practice) will be charged at \$375 per hour, and junior associates at \$330 per hour. I will consult you if circumstances arise in which we anticipate that other attorneys will devote time to the matter. Time devoted by paralegals is charged at billing rates ranging from \$265 to \$360 per hour but for the District we will charge \$255 per hour. These billing rates may be adjusted annually.

In addition to the reduced billing rates above, Miller Nash is also providing Ashland SD a 10% discount for our rates for the first year.

We will send Ashland SD monthly statements describing the work done and expenses incurred through the previous month. Expenses are charged to Ashland SD at cost; we do not add an administrative fee. If a statement is not paid within 30 days, we may suspend performing services until arrangements satisfactory to us have been made for payment of outstanding and future charges and may charge 9 percent per annum interest on overdue amounts from the invoice date.

If at any time you have a question about our fees, please let us know. We want our charges to represent the fair value of our services to our clients.

3. Responsibilities.

Effective legal representation requires that Ashland SD accept certain responsibilities. We expect that Ashland SD will:

- be candid and cooperative with us and keep us informed with complete and accurate factual information, documents, and other communications relevant to our representation;
- allow reasonable time for us to prepare agreements, complete filings, and otherwise conduct our work; and
- inform us of any changes in contact information, including address, telephone number, and email address.

We may express views or beliefs about possible strategies and expected results. These statements are intended to be an expression of opinion only, based on information available to us at the time, and not a promise or guarantee.

4. Communications.

Our communications on this engagement will be with Joseph Hattrick or with other Ashland SD personnel identified to us in writing as authorized contacts.

We will use Internet-based services, such as email, to communicate with Ashland SD. These services involve some risk that third parties may hack into or otherwise intercept confidential communications, but we believe that the benefits outweigh the risk of accidental disclosure. We recommend that Ashland SD personnel avoid using computers or other communications tools owned, controlled, or accessible by others, such as public Wi-Fi networks, cloud storage, or shared home or office computers. Use of any computer, device, or account that is accessible by others increases the risk of hacking and could result in loss of the attorney-client privilege. Any device Ashland SD personnel use should be password-protected.

If Ashland SD would like our email communications to be encrypted, we will work with Ashland SD to establish encryption protocols.

5. Conflict-of-Interest Issues/Advance Conflict Waiver.

Some of our present or future clients may ask us to advise them with respect to matters in which those clients' interests are actually or potentially adverse to Ashland SD's interests. For example, our present or future clients may ask us to advise them with respect to contracts (including bank loans) to which Ashland SD is a party, disputes with Ashland SD (including representing them in contentious arbitration and litigation matters adverse to Ashland SD), and bankruptcy or receivership matters in which those other clients' interests are adverse to Ashland SD's. Additionally, it is possible that while representing Ashland SD in matters adverse to other parties, those adverse parties may ask the firm to represent them in matters unrelated to our work for Ashland SD.

By engaging us, Ashland SD is giving us permission to concurrently represent other clients in matters that are not substantially related to our work for Ashland SD, even though in some cases the interests of those other clients may be directly adverse to or competitive with Ashland SD's interests.

This section is sometimes known as an “advance conflict waiver.” In consenting to this advance waiver, Ashland SD should consider whether there is any significant risk (a) that any confidences or secrets furnished to the firm could be used adversely to it, or (b) that the firm will be less zealous or eager in representing Ashland SD because of the other representation. We believe any risk in these respects is minimal, and the firm would not undertake representation of another client adverse to Ashland SD if it believed that there was a significant risk that the firm’s representation of the other client would be materially limited by its responsibilities to Ashland SD, but Ashland SD should evaluate for itself the material risks of consenting to this advance waiver before retaining us as counsel. By signing this engagement letter (or, if we don’t receive a signed copy of this engagement letter, by directing us to perform work for Ashland SD), we will understand that Ashland SD consents to this advance waiver.

If for any reason this advance waiver is not effective in specific circumstances, Ashland SD agrees to (a) consent to the firm’s resignation from its representation of Ashland SD and (b) support a motion (if filed by us) to withdraw from our representation of Ashland SD if resignation at that time is otherwise permissible under the applicable professional rules.

We recommend that Ashland SD obtain independent legal advice to determine whether to consent to this advance waiver. Whether to seek that advice is up to Ashland SD.

6. Consent to In-House Attorney-Client Privilege.

Sometimes we need to get our own legal advice about our duties to our clients or our handling of a matter. We then confer with an attorney (typically within the firm) who is responsible for providing us with legal advice on these questions. Ashland SD is not charged for this advice.

In some jurisdictions, this in-house consultation may not be protected by attorney-client privilege. By engaging us, Ashland SD consents to our consulting with our firm’s counsel (either in-house or outside) on a privileged basis and confirms that our contemporaneous representation of Ashland SD will not waive, limit, or invalidate the privileged nature of the consultation.

7. Conclusion of Representation.

Ashland SD has the right to terminate our services for any reason at any time. We request that if Ashland SD does so, Ashland SD notify us in writing to avoid any confusion.

In some circumstances, and subject to the applicable professional rules, we may find it necessary or appropriate to withdraw from representing Ashland SD. We will give Ashland SD prompt notice of withdrawal in writing and will take steps that are reasonably practicable to protect Ashland SD's interests.

Unless previously terminated, our representation on any specific matter will conclude when we send our final statement for services rendered in the matter. After our representation of Ashland SD in any specific matter is concluded, we will provide advice as to future legal developments affecting the matter only if Ashland SD specifically engages us to do so. In the event that firm attorneys have performed no work on Ashland SD's behalf for a period of one year, Ashland SD agrees that our attorney-client relationship is terminated as of the last date firm attorneys performed legal services on Ashland SD's behalf, unless otherwise agreed in writing.

Termination of our services or withdrawal from representation does not affect Ashland SD's obligation to pay for legal services and expenses incurred up to the time of termination.

8. Client/Transaction Listings.

Periodically, our firm publicizes names and corporate logos of selected clients and a brief description of significant projects on which we worked. These descriptions will include only information that is publicly available. We would like to have the option of including Ashland SD as one of these selected clients whose successful projects we briefly describe. We will assume that by engaging us, Ashland SD consents to our doing so, unless Ashland SD notifies us otherwise. Ashland SD may withdraw its consent in writing at any time.

9. Return and Disposition of Documents.

At Ashland SD's request, any papers and property Ashland SD provides us will be returned promptly upon receipt of payment for outstanding fees and costs. Ashland SD may also obtain copies of Ashland SD's "external" files (e.g., external correspondence and emails) at our cost of retrieval and duplication, so long as we still retain them. "Internal" files (e.g., internal firm emails, memos prepared for our own use, and firm administrative records) are the property of the firm. For various reasons, including reducing unnecessary storage expenses, we typically destroy or otherwise dispose of any documents or other materials retained within a reasonable time after the representation ends without further notice to you.

10. Sign and Return.

Let me know if you have any questions about our engagement terms. If this letter is acceptable, we ask that it be signed on behalf of Ashland SD and returned to us for our file. Sending a scanned copy by email is fine. While we'd prefer to have a signed copy of this letter, if we don't receive it but we proceed with Ashland SD's work at its request, we will consider ourselves engaged on the terms of this letter.

We are pleased to have this opportunity to work with Ashland SD. Contact me at any time if you have questions or comments about our work.

Very truly yours,



Jollee Faber Patterson

ACKNOWLEDGED AND AGREED:

ASHLAND SCHOOL DISTRICT



By: _____
Name: _____
Title: _____

Please provide contact(s) and email address(es) for appropriate billing distribution.

Contact Name: _____ Email Address: _____

Contact Name: _____ Email Address: _____

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