

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. Personnel Report for September 2024 5

B. Enrollment Report for September 5, 2024 9

C. UPDATE: Board Policy AC Nondiscrimination 11

D. TRAILS middle school grades 6-8 will travel to Lava Beds in Crater 14

Lake National Park, Camp McLaughlin at Lake of the Woods, and

Tule Lake Internment Camp in California to learn about the

internment of Japanese-American citizens during World War II. The travel itinerary is attached.

5. Recurring Reports

A. AHS Student Report 5 minutes

Presenter: AHS Co-President Owen Taylor and Treasury Secretary Azaleah Davis-Powell

B. AEA Report 5 minutes

Presenter: AEA Board Representative Alan Parowski

C. OSEA Report 5 minutes

Presenter: OSEA Board Member James Johnson

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

B. Capital Bond 20 minutes

Presenter: Executive Director of Operations Steve Mitzel & HMK Program

Director Mike Freeman

1) Monthly Bond Report - August 2024 19

C. Finance Report 15 minutes 59

Presenter: Director of Business Services Scott Whitman

9. Unfinished Business

A. JFCEB Cell Phone Policy - Second Reading 60

Presenter: Superintendent Joseph Hattrick

10. New Business

A. GOVERNANCE: 63

- **Board & Superintendent Operating Agreement**
- **Superintendent Goals and Evaluation Schedule**

Presenter: Superintendent Joseph Hattrick

B. 2024-2027 OSEA Collective Bargaining Agreement Tentative Agreement 67

Presenter: Superintendent Joseph Hattrick

C. Board Policy Updates

1) EFA Local Wellness Plan - Update, first reading 146

Presenter: Superintendent Joseph Hattrick

2) GBCBA Alcohol and Controlled Substance Use - New Policy 158

Presenter: Superintendent Joseph Hattrick

11. Announcements and Appointments

Presenter: Board Chair Rebecca Dyson

A. The Board will hold a work session on Thursday, September 26, 2024, on Zoom.

B. The next Regular Session meeting will be held on Thursday, October 10, 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

Ashland School District
Board Personnel Report
September 1, 2024

SITE	NAME	POSITION	STATUS	STATUS CHANGE	SALARY PLACEMENT EXCEPTION
AHS	Isaiah T Creel	Teacher, humanities	Resignation	NO	NONE
AHS	Peter Bolling	Teacher, humanities	Resignation	NO	NONE
AHS	Rebecca Delforge	Fresh Start Nurse	Temporary Service	NO	NONE
AHS	Erin Hope	Fresh Start Nurse	Temporary Service	NO	NONE
AHS	Levi Holden	Assistant Coach, Football 0.50	Temporary Service	NO	NONE
AHS	Scott Robinson	Assistant Coach, Football	Temporary Service	NO	NONE
AHS	Laura Roennfeldt	Assistant Coach, Girls Soccer 0.50	Temporary Service	NO	NONE
AHS	Christopher Brown	Assistant Coach, Girls Soccer 0.50	Temporary Service	NO	NONE
AHS	Stacy Hamer	Assistant Coach, Girls Soccer 0.50	Temporary Service	NO	NONE
AHS	Cassie Jensen	Assistant Coach, Volleyball	Temporary Service	NO	NONE
AHS	Mackenzie Ososke	Assistant Coach, Volleyball	Temporary Service	NO	NONE
AHS	Kaiko'o Victor	Assistant Coach, Boys Soccer 0.50	Temporary Service	NO	NONE
AHS	Sergio Urena	Assistant Coach, Boys Soccer 0.50	Temporary Service	NO	NONE
AHS	Maximillano Malcomb	Assistant Coach, Boys Soccer	Temporary Service	NO	NONE
AHS	Kelly Bolton	Cheerleader Coach	Temporary Service	NO	NONE
AHS	Catherine Barber	Peer to Peer Mentor	Temporary Service	NO	NONE
AHS	Allie Radniecki	Assistant Coach, Girls Soccer	Temporary Service	NO	NONE

Ashland School District
Board Personnel Report
September 1, 2024

AHS	Jenifer Franczak	Teacher, humanities	increase to 1.0 FTE	NO	NONE
AHS	Rebecca DeSalvo	Teacher, Science	decrease to 0.50 FTE	NO	NONE
AHS	Carolyn Ilene Scott-Patterson	Teacher, humanities	1.0 FTE (Temporary)	NO	NONE
AHS	Donna LaVonne Self Jones	Secretary II	1.0 FTE	NO	NONE
AHS	Nehemiah Dedmon	Youth Advocate	0.75 FTE	NO	NONE
AHS	Donna Hokama	EA- Media Assistant	decrease to 0.875 FTE	NO	NONE
AHS	Jose Ultretas Soriano	Academic Advisor Fall	Temporary Service	NO	NONE
AMS	Andrea Royce	MS Drama	Temporary Service	NO	NONE
AMS	Matt Dierks	Assistant Football Coach	Temporary Service	NO	NONE
AMS	Gracie Folkman	Volleyball Coach	Temporary Service	NO	NONE
AMS	Jennifer Carstensen	MS Band	Temporary Service	NO	NONE
AMS	Austin Wallace	Cross Country Head Coach	Temporary Service	NO	NONE
AMS	Angela Johnson	Cross Country Assistant Coach	Temporary Service	NO	NONE
AMS	Karin Pasche	MS Athletic Director (.5)	Temporary Service	NO	NONE
AMS	Kerri Mallori	MS Athletic Director (.5)	Temporary Service	NO	NONE
AMS	Christie Lawson	Cross Country Assistant Coach	Temporary Service	NO	NONE
AMS	Greg White	Head Football Coach	Temporary Service	NO	NONE
AMS	Gina Esposito	Volleyball Coach	Temporary Service	NO	NONE
AMS	Lauren Trolley	MS Orchestra	Temporary Service	NO	NONE
AMS	Rosie Converse	Volleyball Coach	Temporary Service	NO	NONE
AMS	Tara Elder-Hammond	Volleyball Coach	Temporary Service	NO	NONE
AMS	William Beckett	Volleyball Coach	Temporary Service	NO	NONE
AMS	Jacob Holderman	Volleyball Coach	Temporary Service	NO	NONE
AMS	Robert Levorse	Assistant Football Coach	Temporary Service	NO	NONE

Ashland School District
Board Personnel Report
September 1, 2024

AMS	Ashley Ambrosio	Peer to Peer Mentor	Temporary Service	NO	NONE
AMS	Austin Wallace	Peer to Peer Mentor	Temporary Service	NO	NONE
AMS	Allen Lambert	Peer to Peer Mentor	Temporary Service	NO	NONE
AMS	Jacob Holderman	Peer to Peer Mentor	Temporary Service	NO	NONE
AMS	Brittany Hardy	Peer to Peer Mentor	Temporary Service	NO	NONE
AMS	Lance Matthewson	CDS	1	NO	NONE
AMS	Jamie Hirsh	Peer to Peer Mentor	Temporary Service	NO	NONE
Maintenance	Douglas Ingram	Assistant Head Custodian AHS	1.0 FTE	NO	NONE
Maintenance				NO	NONE
Nutrition SVC	Kali Kennedy	Food Service Worker	Resignation	NO	NONE
Nutrition SVC	Heather Young	Cafeteria Manager	Resignation	NO	NONE
Nutrition SVC	Casaundra Esposito	Cafeteria Manager	increased to 0.875 FTE	NO	NONE
Nutrition SVC	Melissa Lebarre-Empson	Cafeteria Manager	decreased to 0.8125 FTE	NO	NONE
Nutrition SVC	Mirna Iturbe	Food Service Worker	0.6875 FTE	NO	NONE
Nutrition SVC	Ishmael Thomas	Food Service Worker	0.8125 FTE	NO	NONE
Nutrition SVC	David Krenz	Food Service Worker	0.50 FTE	NO	NONE
Transportation	Karina Harmarfield	Bus Driver	Resignation	NO	NONE
Willow Wind	Evan Partch Mikkelson	EA	Resignation	NO	NONE
Willow Wind	Emily Bland	Peer to Peer Mentor	Temporary Service	NO	NONE
Willow Wind	Alexi McCullough	EA	0.469 FTE	NO	NONE
Student Services	Katrina Caudill	Peer to Peer Mentor	Temporary Service	NO	NONE

Ashland School District
 Board Personnel Report
 September 1, 2024

Student Services				NO	NONE
Student Services				NO	NONE
TRAILS	Linda Grace Wilhelm	EA SPED I	Resignation	NO	NONE
TRAILS	Linda Grace Wilhelm	EA	0.4690 FTE	NO	NONE
TRAILS	Neal Warren	EA	0.469 FTE	NO	NONE
TRAILS					
Helman	David Downey	Teacher, Site based	1 FTE	NO	NONE
Helman	Kelly Harding	Secretary II	0.6875 FTE	NO	NONE
Walker	Maureen Honeycutt	EA	Resignation	NO	NONE
Walker	Molly Moncrief	Peer to Peer Mentor	Temporary Service	NO	NONE
Walker	Tyler Claycomb	Peer to Peer Mentor	Temporary Service	NO	NONE
District Office	Lisa Trulove	5th Grade Orchestra	Temporary Service	NO	NONE
District Office	Nancie Shaw	5th Grade Orchestra	Temporary Service	NO	NONE
District Office	Amy Merwin	Teacher, Choir	0.056 FTE	NO	NONE

ASHLAND PUBLIC SCHOOLS ENROLLMENT SUMMARY

September 2024 Full Time Enrollment

SITE	K	1	2	3	4	5	6	7	8	9	10	11	12		
BELLVIEW	48	35	38	44	39	43								247	BELLVIEW
HELMAN	34	40	43	43	55	42								257	HELMAN
WALKER	36	41	37	38	43	50								245	WALKER
TRAILS	13	12	15	17	16	17	17	16	18					141	TRAILS
*Ashland CONNECT	0	1	0	3	3	3	1	1	4					16	CONNECT
AMS							168	162	198					528	AMS
AHS										233	212	227	203	875	AHS
WILLOW	18	21	22	21	24	20	25	25	19					195	WILLOW
Level 2 Program	0	0	0	0	0	2	1	1	2	1	1	0	0	8	
ASD TOTALS	149	150	155	166	180	177	212	205	241	234	213	227	203	2512	TOTAL

	September Enrollment History															
	2010	2011	2012	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025		
BELLVIEW				315	322	325	315	318	263	256	246	258	254	247	BELLVIEW	
HELMAN				303	314	351	345	345	286	286	281	315	302	257	HELMAN	
WALKER				299	342	343	337	344	275	277	226	221	241	245	WALKER	
JOHN MUIR				100	120	122	123	122	105	107	180	135	139	141	TRAILS	
AMS				579	562	565	564	517	485	480	461	527	529	528	AMS	
AHS				971	996	971	950	940	942	914	934	888	822	875	AHS	
WILLOW				195	192	179	178	180	159	150	150	163	179	195	WILLOW	
Ashland Connect											0	24	24	16	CONNECT	
Level 2 Program														8		
ASD TOTALS				2762	2848	2856	2812	2766	2515	2470	2478	2531	2490	2512	ASD TOTALS	

	Monthly Enrollment									
	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
2024-2025	2512									
2023-2024	2571	2553	2539	2532	2529	2541	2518	2505	2495	2490
2022-2023	2560	2563	2546	2552	2543	2543	2530	2538	2535	2531
2021-2022	2478	2487	2441	2449	2465	2483	2471	2476	2472	2443
2020-2021			2530	2515	2509	2505	2490	2491	2486	2470
2019-2020		2835	2825	2820	2804	2797	2781	2774	2763	2766
2018-2019		2897	2894	2881	2860	2846	2830	2842	2824	2812
2017-2018	2935	2922	2913	2912	2905	2897	2892	2878	2869	2856
2016-2017	2898	2897	2901	2929	2879	2861	2847	2845	2826	2848

ASHLAND PUBLIC SCHOOLS ENROLLMENT SUMMARY

2015-2016	2856	2852	2845	2875	2815	2814	2796	2793	2779	2812
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NOTES:

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

Ashland School District 5

Code: AC
Adopted: 8/09/10
Revised/Readopted: 5/08/17; 11/09/23
Orig. Code: AC

Nondiscrimination

The district prohibits discrimination and harassment on any basis protected by law including, but not limited to, an individual's perceived or actual race¹, color, religion, sex, sexual orientation, gender identity, national or ethnic origin, marital status, age, mental or physical disability, pregnancy, familial status, economic status or veterans' status, or because of the perceived or actual race, color, religion, sex, sexual orientation, gender identity, national or ethnic origin, marital status, age, mental or physical disability, pregnancy, familial status, economic status or veterans' status of any other persons with whom the individual associates.

The district prohibits discrimination and harassment in, but not limited to, employment, assignment and promotion of personnel; educational opportunities and services offered students; student assignment to schools and classes; student discipline; location and use of facilities; educational offerings and materials; and accommodating the public at public meetings.

The Board encourages staff to improve human relations within the schools, to respect all individuals and to establish channels through which constituents can communicate their concerns to the administration and the Board.

[The Board directs the superintendent to designate the district's civil rights coordinator and make contact information available to staff, students and parents. { }]

The superintendent shall appoint individuals to contact on issues concerning the Americans with Disabilities Act and Americans with Disabilities Act Amendments (ADA), Section 504 of the Rehabilitation Act, Titles VI and VII of the Civil Rights Act, Title IX of the Education Amendments, and other civil rights or discrimination issues. The district will publish complaint procedures providing for prompt and equitable resolution of complaints from students, employees and the public, and such procedures will be available at the district's administrative office and available on the home page of the district's website.

The district prohibits retaliation and discrimination against an individual who has opposed any discrimination act or practice; because that person has filed a charge, testified, assisted or participated in an investigation, proceeding or hearing; and further prohibits anyone from coercing, intimidating, threatening or interfering with an individual for exercising any rights guaranteed under state and federal

law.

Legal Reference(s):
END OF POLICY
[ORS 174.100](#)

[ORS 192.630](#)

[ORS 326.051\(1\)\(e\)](#)

¹ Includes discriminatory use of a Native American mascot pursuant to OAR 581-021-0047. Race also includes physical characteristics that are historically associated with race, including but not limited to natural hair, hair texture, hair type and protective hairstyles as defined by ORS 659A.001 (as amended by House Bill 2935 (2021)).

[ORS 408.230](#)
[ORS 659.805](#)
[ORS 659.815](#)
[ORS 659.850 - 659.860](#)
[ORS 659.865](#)
[ORS 659A.001](#)
[ORS 659A.003](#)
[ORS 659A.006](#)
[ORS 659A.009](#)

[ORS 659A.029](#)
[ORS 659A.030](#)
[ORS 659A.040](#)
[ORS 659A.103 - 659A.145](#)
[ORS 659A.230 - 659A.233](#)
[ORS 659A.236](#)
[ORS 659A.309](#)
[ORS 659A.321](#)
[ORS 659A.409](#)

[OAR 581-002-0001 – 002-0005](#)
[OAR 581-021-0045](#)
[OAR 581-021-0046](#)
[OAR 581-021-0047](#)
[OAR 581-022-2310](#)
[OAR 581-022-2370](#)
[OAR 839-003](#)

Age Discrimination Act of 1975, 42 U.S.C. §§ 6101-6107 (2018).

Age Discrimination in Employment Act of 1967, 29 U.S.C. §§ 621-633 (2018); 29 C.F.R Part 1626 (2019).

Americans with Disabilities Act of 1990, 42 U.S.C. §§ 12101-12112 (2018); 29 C.F.R. Part 1630 (2019); 28 C.F.R. Part 35 (2019).

Equal Pay Act of 1963, 29 U.S.C. § 206(d) (2018).

Rehabilitation Act of 1973, 29 U.S.C. §§ 791, 793-794 (2018); 34 C.F.R. Part 104 (2019).

Title IX of the Education Amendments of 1972, 20 U.S.C. §§ 1681-1683, 1701, 1703-1705, 1720 (2018); Nondiscrimination on the Basis of Sex in Education Programs or Activities Receiving Federal Financial Assistance, 34 C.F.R. Part 106 (2020).

Title VI of the Civil Rights Act of 1964, 42 U.S.C. § 2000d (2018); 28 C.F.R. §§ 42.101-42.106 (2019).

Title VII of the Civil Rights Act of 1964, 42 U.S.C. § 2000e (2018); 29 C.F.R. § 1601 (2019).

Wygant v. Jackson Bd. of Educ., 476 U.S. 267 (1989).

Americans with Disabilities Act Amendments Act of 2008, 42 U.S.C. §§ 12101-12133 (2018); 29 C.F.R. Part 1630 (2019); 28 C.F.R. Part 35 (2019).

The Vietnam Era Veterans' Readjustment Assistance Act of 1974, 38 U.S.C. § 4212 (2018).

Genetic Information Nondiscrimination Act of 2008, 42 U.S.C. § 2000ff-1 (2018); 29 C.F.R. Part 1635 (2019).

House Bill 2935 (2021).

House Bill 3041 (2021).

Cross Reference(s):

ACB - Every Student Belongs

JBB - Equity Policy

GBA - Equal Employment Opportunity

JB - Equal Educational Opportunity

KL - Public Complaints

7/30/2024

CIVIL RIGHTS COORDINATOR

(2)(a) A district school board shall designate one or more civil rights coordinators for the school district. A civil rights coordinator may be an employee of the school district or the school district may enter into a contract with an education service district for the services of a civil rights coordinator. A civil rights coordinator, at a minimum, shall:

(A) Monitor, coordinate and oversee school district compliance with state and federal laws prohibiting discrimination in public education;

(B) Oversee investigations of complaints alleging discrimination in public education and ensure that the investigations are resolved;

(C) Provide guidance to school and school district personnel on civil rights issues in the school district, respond to questions and concerns about civil rights in the school district and coordinate efforts to prevent civil rights violations from occurring in the school district;

(D) Satisfy any training requirements prescribed by the State Board of Education by rule; and

(E) Comply with any rules adopted by the State Board of Education for the purpose of implementing this paragraph.

(b) As used in this subsection, "discrimination" has the meaning given that term in ORS 659.850 when used in relation to state law.

(c) For the purpose of this subsection, the Department of Education shall annually make available training for civil rights coordinators and the State Board of Education may adopt any necessary rules.

To: Ashland School Board

The TRAILS Outdoor School sixth, seventh and eighth grades are planning a multi-day trip in the fall of 2024 to support our school-wide unit of study on earth systems (geology). Our plan is for 52 students to travel by district bus from Ashland on September 24th to Crater Lake National Park and on to Camp Mclaughlin at Lake of the Woods, where we'll spend two nights. On the 26th, we'll leave the camp and drive to Lava Beds National Monument, where we have scheduled to meet with a National Park Service ranger and hike the Whitney Butte Trail to the head of a lava flow from tens of thousands of years ago. We'll camp at the monument campground on the night of the 26th and explore several lava tubes after dinner. On the morning of the 27th, we'll pack up and drive to the Tule Lake Internment Camp, where we'll meet a park service ranger to learn about the role the site played in denying Americans of Japanese heritage their rights during World War II. After lunch, we'll drive back to Ashland for normal dismissal.

This trip is partially supported through a Measure 99 "Outdoor School" grant, applied to our sixth grade students.

As always, we appreciate the support of the Ashland School Board and the district in allowing our students to learn about the outdoors in a hands-on manner.

Sincerely,

James Bowers

6th/7th Grades, TRAILS Outdoor School

T-00927 "Middle School 3 night Trip"

Request Estimate Approve Schedule Complete Invoice Payment Attachments

Request Submitted by

helen.clearly on 9/4/2024 10:48 AM

Trip Name

Middle School 3 night Trip

Itinerary

TRAILS Outdoor School

158 Walker Ave

Arrive Date/Time

9/24/2024 8:15 AM

Depart Date/Time

9/24/2024 8:30 AM

Crater Lake National Park

Oregon - 59.93 mi

Arrive Date/Time

9/24/2024 10:30 AM

Depart Date/Time

9/24/2024 4:15 PM

Camp McLoughlin

Oregon - 38.53 mi

Arrive Date/Time

9/24/2024 5:00 PM

Depart Date/Time

9/25/2024 7:15 AM

Approve

Deny

Express Approval

Trip History

Trip Status: Pending Approval



Search within Map

Map

Reset View

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Actions

Itinerary for Fall Unit Studies Geology Trip 9/24-9/27, 2024

Bus driver duties are highlighted for each day

Tuesday 9/24

8:00 – 8:10 meet in classrooms/load gear/use restrooms (know what your overnight bag looks like!)

8:30 Laurie's (17 kids), Jim's and Marcia's (51 kids) classes depart for Crater Lake--Stop for bathroom break at Casey State Park on HWY 62 just shy of Lost Creek Dam

11:00 Arrive at Crater Lake/bathroom break/meet NPS rangers for hikes

Group A starts near Sinnott Overlook/ Group B to The Watchman - Lunch on hikes

Group A then heads to Garfield Peak/Group B returns to Sinnott Overlook

4:00 Return to Rim Village/Bathroom break/Snack

4:15 Depart for Camp McLoughlin/

6:00 Set up Tents

7:15 Dinner—come to dinner with flashlight/utensils/plate/bowl and water to be filled for Wednesday.

---Pack day packs for Wednesday, fill water, make sack lunches
Dinner clean up

8:00 Class meetings

8:30 get ready for bed—Chaperone meeting in the dining hall

8:45 in tents

9:15 flashlights off—get ready for a big day!

Wednesday 9/25

6:30 Wake up for groups 3-7
Breakfast #1/grab sack lunches

7:15 Groups 3-7 depart for trailhead

7:30 Wake up for groups 1-3/Laurie's class

8:00 Breakfast #2/grab sack lunches

8:30 Groups 1-3 Depart for trailhead/Laurie's class (17 kids) heads to Brown Mountain on different bus (back to school at the end of the day)

****1:30 Summit Turn Around Time for Everyone****

Bus departs trailhead heading to camp at 2pm/3:30/5:00pm

All students and adults will check in with trailhead parent who will check names off the roster/hand out snack

2:30-6:00 Camp stations and activities run by parent volunteers

- a) Relax in common areas or your assigned tent
- b) Independent Reading b) Art c) Outdoor games

d) Swimming under paid lifeguard supervision e) Afternoon snack

6:00 Nature Journaling/Reflect upon your day

6:30 Dinner-- come to dinner with flashlight and water to be filled for Thursday.

7:00 Pack sack lunches for Thursday

Dinner clean up

7:30 possible campfire/s'mores-- Share stories from the day

8:30 get ready for bed/pack day pack for Thursday

9:00 in tents—flashlights and whispers only

9:30 lights out

Thursday 9/26

7:00 Clean up, break down tents, pack up overnight bag, daypack has journal/book/layers/water

8:00 Come to breakfast with ALL personal gear completely packed and ready to go

Clean camp—leave it better than we found

9:15 Depart for Internment Camp—have snack on the bus (zero waste)

10:45 Arrive at Internment Camp—bathroom break

11:00 Whole group introduction

Split large group into half and then each half into thirds

One hour at each location based upon start time:

Groups 1, 2, 3 start at Internment camp (jail) tour / Suitcase activity / Barrack activity

Groups 4, 5, 6 stay at visitor's center -- two rotations of 30 minutes (visitor's center exhibits AND eating lunch outside)

1:45 Load bus and head to Captain Jack's Stronghold –Afternoon Snack—explore—nature journaling

4:30 Visitor Center—Safety talk—White Nose Syndrome and Cave Safety

5:00 Arrive at camp, set up tents, free time

6:00 Dinner/Dinner clean up—come to dinner with daypack: 2 headlamps/flashlights, warm layers, knee pads, gloves, helmet, water

6:45 Load bus for night walk drop off – groups/different directions/explore lava tubes by headlamp & walk back to camp

8:45 Independent reading/down time

9:00 Get ready for bed

9:30 Flashlights only

10:00 Lights out

Friday 9/28

7:00 Wake up, pack up all camping gear (won't see overnight bag again until back at school!!!)—prep day packs for the day. Help close down kitchen/load gear

Breakfast, pack sack lunches—have am snack handy

9:00 Walk from campground on Bunchgrass Trail to Bunchgrass Overlook (1mi/one direction) on main park road

10:00 Load bus—head to Schonchin Butte Trailhead (1.4mi RT)

11:30 lunch

12:00 Depart for home/Bathroom break along the way @ Crest Park in Klamath Falls

Return to school—help unload gear and clean up (students excused by teachers once communal clean up is complete)

Daypack: Lunch, Layers, Liquid, Log (Your Nature Journal), pen/pencil, independent reading book, rain cover—anything you'd like to have for the bus ride home (games, etc)



AHS Science Phase 2 Underground Trenching

ASHLAND SCHOOL DISTRICT CAPITAL BOND PROGRAM

END OF MONTH REPORT – AUGUST 2024





GENERAL PROGRAM UPDATE

In August there was a heavy push to get the occupied spaces at Ashland High School completed in time for staff to return to campus. The construction teams have moved to off hours shifts now to accommodate school being back in session. Work will continue in the Science building, Humanities 1st and 3rd floors and the English building. In addition, the bond team is starting to plan the Ashland High School Science Building Seismic Project after receiving another state funded grant.

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 August, we requested 6 additional purchase orders and processed 15 invoices.

Contract Type	Number of Contracts	Value
Professional Service Agreements / Design Contracts	--	\$ 22,349,015
Construction Contracts	6	\$ 105,169,217



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	100%	
Construction	06/16/23	12/31/24	70%	
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

Construction on the Humanities building is continuing with a final push into the start of the school year. The team has been heavily focused on completing finishes in the level 2 spaces that are to be occupied for school. The finishes included door and hardware installation, flooring, paint, trim and casework. Meanwhile in the level 1 and 3 floors, the mechanical work is continuing with rough in of the mechanical, plumbing, electrical and fire sprinkler. The elevator installation was started at the north tower and the south tower restroom renovations are moving forward.

In the Phase 1 Science building the team worked to get the areas ready for staff to return. The focus was on getting the final finishes completed. Again, these included paint, trim, casework, access control, sound matt, and final completion of the new MEP chases throughout these spaces. Phase 2 work is continuing in the tech corridor and remainder of the Science area with framing, MEP demo and rough in, insulation. On the exterior, the concrete patch back for the new hydronic lines and electrical feeders were completed. The new roof on the Science building was completed and a final walk through was achieved.

At the Gym building, the underground electrical and hydronic work was completed. Inside the building, the new electrical and hydronic runs were prepped for installation with the required structural



additions. On the exterior, the new transformer was installed, and the electrical feeders were reinstalled after a brief planned power outage to the building.

ACTIVITIES SCHEDULED FOR NEXT PERIOD

- New guardrail installation at Humanities building
- Continued MEP installation at Humanities Building level 1 and 3
- Completion of the English building restroom

ADDITIONAL INFORMATION

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

Josh Whitaker, Project Manager

josh.whitaker@hmkco.org

541.601.3638



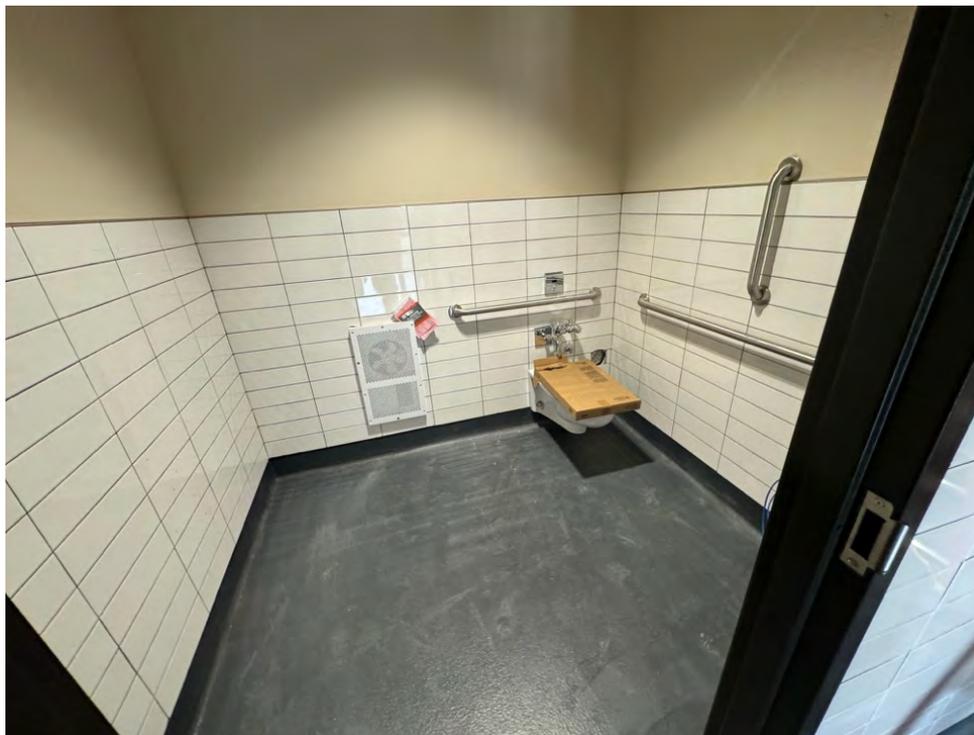
PROJECT PHOTO GALLERY

Humanities Building Railing Replacement in Progress





Humanities North Tower New Restroom





FRP Reinforcement at 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
AUGUST 31, 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	\$ 181,095	\$ (13,095)	\$ 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	\$ 458,581	\$ 427,479	\$ 886,060
Total Project Cost	\$ 33,467,752	\$ 7,097,989	\$ 729,115	\$ 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
AUGUST 31, 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	\$ 6,632,213	\$ 4,628,566	\$ 2,003,647	\$ 6,632,213
Miscellaneous	\$ -	\$ 292,968	\$ -	\$ 146,252	\$ 146,252
Total Revenue	\$ 138,349,617	\$ 146,470,625	\$ 143,584,335	\$ 3,842,591	\$ 147,426,926

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

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



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
PROGRAM BUDGET
AUGUST 31, 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	\$ -	\$ 929,659	\$ 721,139	\$ 1,650,798
Helman Elementary	\$ 11,294,084	\$ 15,367,756	\$ (232,685)	\$ 15,135,071
Walker Elementary	\$ 11,252,185	\$ 29,891,609	\$ 325,927	\$ 30,217,537
Ashland Middle School	\$ 21,960,270	\$ 35,732,695	\$ (285,319)	\$ 35,447,376
Ashland High School	\$ 9,124,089	\$ 11,240,253	\$ 16,376,836	\$ 27,617,089
Willow Wind Learning Center	\$ -	\$ 1,732,696	\$ 1,732	\$ 1,734,428
Construction Sub Total	\$ 78,222,215	\$ 101,534,076	\$ 17,209,266	\$ 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)	\$ -	\$ 402,099	\$ (96,450)	\$ 305,649
Ashland SD Staff	\$ -	\$ 1,182,221	\$ (324,585)	\$ 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	\$ 8,322,382	\$ (142,582)	\$ 8,179,800
A & E Reimbursable Expenses	\$ 144,431	\$ 35,420	\$ 81,103	\$ 116,523
Commissioning	\$ 334,589	\$ 390,379	\$ (30,070)	\$ 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	\$ 3,277,133	\$ 240,080	\$ 3,517,213
Special Inspection and Testing	\$ 391,469	\$ 720,723	\$ (180,018)	\$ 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	\$ 25,697,281	\$ (856,288)	\$ 24,840,993
Total Project Cost	\$ 111,244,488	\$ 127,231,357	\$ 16,352,978	\$ 143,584,335



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
PROGRAM LEVEL BUDGET
AUGUST 31, 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	\$ -	\$ 402,099	\$ (96,450)	\$ 305,649
Ashland SD Staff	11,12	\$ -	\$ 1,182,221	\$ (324,585)	\$ 857,636
Lincoln Elementary		\$ -	\$ 42,354	\$ 446	\$ 42,800
District Wide Roofing Project		\$ -	\$ 46,200	\$ -	\$ 46,200
Sub Total Soft Cost		\$ 625,293	\$ 7,075,140	\$ (687,583)	\$ 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
AUGUST 31, 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
AUGUST 31, 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
AUGUST 31, 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
AUGUST 31, 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
AUGUST 31, 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
AUGUST 31, 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	\$ -	\$ 139,092	\$ (16,092)	\$ 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		\$ -	\$ 224,793	\$ 10,583	\$ 235,376
Total Project Cost		\$ -	\$ 1,798,927	\$ 277,917	\$ 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
AUGUST 31, 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
AUGUST 31, 2024**

Project Expense		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Hard Cost					
Maximum Allowable Construction Cost (MACC)	13	\$ 10,576,000	\$ 15,367,756	\$ (232,685)	\$ 15,135,071
Asbestos		\$ 189,259		\$ -	\$ -
Seismic Retro Upgrade				\$ -	
1.5% Solar (Total Project Major Building)				\$ -	\$ -
Construction Contingency	13	\$ 528,825	\$ -	\$ -	\$ -
Construction Sub Total		\$ 11,294,084	\$ 15,367,756	\$ (232,685)	\$ 15,135,071
Soft Cost					
Administrative Cost					
Legal Fees		\$ 15,000	\$ -	\$ -	\$ -
Bond Counsel		\$ -	\$ -	\$ -	\$ -
Bond Issuance Cost		\$ -	\$ -	\$ -	\$ -
Builders Risk Insurance		\$ -	\$ 10,869	\$ 131	\$ 11,000
Project Management		\$ 338,823	\$ -	\$ -	\$ -
Reimbursable Expenses		\$ 22,588	\$ -	\$ -	\$ -
Communications		\$ -	\$ -	\$ -	\$ -
Sustainability		\$ -	\$ -	\$ -	\$ -
Site Cost					
Site Survey		\$ 22,588	\$ 16,151	\$ -	\$ 16,151
Geo-Tech Report		\$ 33,882	\$ 22,170	\$ 30	\$ 22,200
Planning Cost					
Design Fees	13	\$ 1,129,408	\$ 1,213,367	\$ 0	\$ 1,213,367
A & E Reimbursable Expenses		\$ 22,588	\$ 271	\$ 0	\$ 271
Commissioning		\$ 56,470	\$ 42,420	\$ 1,000	\$ 43,420
Printing & Plan Distribution		\$ 2,500	\$ -	\$ -	\$ -
Hazardous Materials Consultant	13	\$ 56,470	\$ 79,820	\$ 13,200	\$ 93,020
Constructability Review		\$ 56,470	\$ 75,000	\$ 470	\$ 75,470
Plan Review & Building Permits		\$ 112,941	\$ 640,326	\$ 8,448	\$ 648,774
Special Inspection and Testing		\$ 79,059	\$ 144,118	\$ 38,102	\$ 182,220
Miscellaneous Fees	13,14	\$ 45,176	\$ 99,456	\$ 1,978	\$ 101,434
Ed Specs		\$ 22,588	\$ -	\$ -	\$ -
Kitchen		\$ -	\$ -	\$ -	\$ -
Miscellaneous					
Legal Advertisements		\$ 2,000	\$ -	\$ -	\$ -
Furniture, Fixtures, and Equipment (FF&E)		\$ 564,704	\$ 586,301	\$ (3,362)	\$ 582,939
Technology		\$ 112,941	\$ -	\$ -	\$ -
Technology (Design)		\$ 56,470	\$ 5,404	\$ 96	\$ 5,500
Acoustics		\$ 16,941	\$ -	\$ -	\$ -
Criminal Background Checks		\$ 2,000	\$ -	\$ -	\$ -
System Development Charges	13,14	\$ 112,941	\$ -	\$ -	\$ -
Value Engineering		\$ 56,470	\$ -	\$ -	\$ -
Utility Connection Fee		\$ -	\$ -	\$ -	\$ -
Unallocated Owner Contingency		\$ 1,129,408	\$ -	\$ -	\$ -
Inflation		\$ 921,871	\$ -	\$ -	\$ -
Sub Total Soft Cost		\$ 4,992,297	\$ 2,935,673	\$ 60,093	\$ 2,995,766
Total Project Cost		\$ 16,286,381	\$ 18,303,429	\$ (172,592)	\$ 18,130,837

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



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
ASHLAND MIDDLE SCHOOL BUDGET
AUGUST 31, 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
AUGUST 31, 2024**

Project Expense		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Hard Cost					
Phase II: HVAC		\$ -	\$ 8,376,675	\$ 1,683,325	\$ 10,060,000
Maximum Allowable Construction Cost (MACC)		\$ 8,544,000	\$ 2,863,579	\$ 10,978,421	\$ 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	\$ 11,240,253	\$ 16,376,836	\$ 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	\$ 2,459,700	\$ (383,168)	\$ 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	\$ 475,325	\$ 167,645	\$ 642,970
Special Inspection and Testing		\$ 45,620	\$ 317,770	\$ (216,150)	\$ 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	\$ 4,347,492	\$ (628,708)	\$ 3,719,292
Total Project Cost		\$ 13,179,849	\$ 15,127,011	\$ 15,748,128	\$ 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
AUGUST 31, 2024**

Project Expense		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Hard Cost					
Maximum Allowable Construction Cost (MACC)	15	\$ 8,533,000	\$ 26,590,655	\$ 436,036	\$ 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	\$ 29,891,609	\$ 325,927	\$ 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	\$ 34,866,960	\$ 165,777	\$ 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
AUGUST 31, 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
AUGUST 31, 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 \$ -	\$ 398,879	\$ 19,521	\$ 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	\$ -	\$ 929,659	\$ 721,139	\$ 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	\$ -	\$ 1,058,175	\$ 724,223	\$ 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 5
Statement of Resources and Requirements
Fiscal Year Comparison - 2024 vs 2023

	Current Year:			Projected Fiscal 2024 at 6/30/2024	Change from Prior Monthly Report	Notes	FY 2023 Actual
	Budget FY 2023-2024	Fiscal 2024 at 6/30/2024	% of Budget				
General Fund Revenues							
State School Fund Formula							
State School Fund	12,475,000	13,717,963	110.0%	13,652,197	281,610	FY23 Rebalancing	12,692,183
Property Taxes	16,950,000	16,647,999	98.2%	16,647,999	(301,910)	Lower June-August collections	16,294,912
Common School Fund	335,000	339,114	101.2%	339,114	(443)		322,236
Federal Forest Fees	30,000	30,054	0.0%	30,054	54		28,458
Youth Levy	4,800,000	4,839,189	100.8%	4,839,189	(17,740)		4,542,838
Interest on Investments	650,000	857,986	132.0%	857,986	(48,753)	Declining balances	688,082
Tuition and Fees	75,000	85,230	113.6%	85,230	-		93,489
Rentals	85,000	55,828	65.7%	55,828	(18,497)		76,242
Contributions	25,000	141	0.6%	141	(24,993)		2,228
Fees Charged to Grants	300,000	153,744	51.2%	153,744	(27,157)		228,630
Other Local Sources	215,000	77,273	35.9%	77,273	(24,695)		50,230
Fund-raising - Fund 105	200,000	295,488	147.7%	295,488	(59,869)		258,367
Class Fees - Fund 110	190,000	175,342	92.3%	175,342	(26,085)		203,592
Other Intermediate Sources	700,000	532,048	76.0%	532,048	(165,117)	Missed Projection	783,723
Other State Sources	50,000	-	0.0%	65,766	50,766		306,555
Other Federal Sources	10,000	-	0.0%	-	-		-
Other Sources	160,000	160,000	100.0%	160,000	-		161,500
Total Revenues	\$ 37,250,000	\$ 37,967,399	101.9%	\$ 37,967,399	(382,829)		\$ 36,733,265
General Fund Expenses							
Salaries	19,699,090	20,608,873	104.6%	20,608,873	155,727	Missed Projection	19,090,478
Benefits	12,832,262	13,540,647	105.5%	13,540,647	204,886	Missed Projection	12,706,604
Purchased Services	2,795,132	3,724,712	133.3%	3,724,712	228,491	Unanticipated expenses	3,412,690
Supplies & Materials	1,496,870	1,566,981	104.7%	1,566,981	(15,903)		1,223,467
Fund-raising - Fund 105	225,000	249,720	111.0%	249,720	15,346		208,932
Class Fees - Fund 110	147,500	187,063	126.8%	187,063	32,329		201,097
Capital Outlay	20,000	-	0.0%	-	-		59,904
Other Objects	569,146	726,427	127.6%	726,427	(24,498)		533,239
Transfers	365,000	11,084	3.0%	11,084	(3,516)		14,093
Contingency	500,000	-	0.0%	-	-		-
Total Expenses	\$ 38,650,000	\$ 40,615,507	105.1%	\$ 40,615,507	592,862		\$ 37,450,504
Beginning Fund Balance	\$ 2,900,000	\$ 2,089,452	72.1%	\$ 2,089,452	(235,990)	FY2023 Correction	\$ 3,042,681
End of Fiscal Year Balance	\$ 1,500,000			\$ (558,656)	(1,211,681)		\$ 2,325,442

ASHLAND SCHOOL DISTRICT

Code: JFCEB
Adopted: First read: August 2024
Second Read: 2024.09.11

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



Ashland School District #5

Board – Superintendent Operating Agreement

Purpose:

The Board of Directors is the educational policy making body for the Ashland School District. To effectively meet the system's challenges the School Board and Superintendent must function together as a leadership team. To ensure unity among team members, effective group agreements must be in place. The following are the group agreements for the Board and Superintendent.

Collaborative Governance:

1. Members of the Board and the Superintendent shall work together as a team; modeling lifelong learning and collaboration.
2. Board members shall recognize and respect the Superintendent's responsibility to manage the school district and to direct employees in district and school matters.
3. Board members shall give careful consideration, listening to all perspectives, to all issues brought to the board by individuals and district leadership.
4. The Board shall make decisions only at properly called meetings. Board members recognize that individual members have no authority to take individual action in policy or district and school administrative matters, unless so authorized by board vote.

Communication Agreements:

1. Board members shall follow the chain-of-command and communicate directly with the Superintendent when a question arises, or a concern or complaint is voiced by a staff member, student, parent or community member.
2. Board Members shall communicate directly with the Superintendent or Board Chair prior to meetings of the board to address questions and/or concerns about agenda items.
3. When a Board member and/or the Superintendent has an individual concern, he or she shall communicate one-on-one with any member of the board-superintendent team as appropriate.
4. Support decisions of the majority. Once a decision is made, members will support the decision of the majority.
5. Be mindful that you represent the board in public and that communication should remain positive about the district/board and that no individual board member has the authority to speak for the board without specific approval by the board.

Collective Commitments to:

- Respectful interactions.
- Learning together.
- The understanding that we are all human, we WILL make mistakes, should welcome feedback when we do, and use feedback to grow.
- Filter decisions through the lens of vision, mission, and what is in the best interests of our students.
- Having fun.

2024-2025 Board Expectations of the Superintendent:

1. Provide data to the board members so that data driven decisions can be made.
2. Distribute appropriate information to all board members.
3. Communicate with board members promptly and effectively.
4. Represent the school district by being visible in the community.
5. Provide follow-up information to board members on concerns and issues they have referred to the Superintendent - close the communication loop.

2024-2025 Superintendent's Expectations of the Board:

1. Integrity of the highest order.
2. Recognition of the superintendent as the educational leader of the school district.
3. An effort to foster unity, harmony and open communications within the board.
4. Practice of avoiding surprise items at board meetings.
5. Willingness to abide by its own rules, policies and code of ethical conduct.

Signatures of Agreement: (or date of adoption by the school board)

Date: _____

_____	_____
_____	_____
_____	_____

ASHLAND PUBLIC SCHOOLS

JACKSON COUNTY SCHOOL DISTRICT #5

BOARD OF DIRECTORS
REBECCA DYSON
JILL FRANKO
RUSSELL HATCH
DANIEL RUBY
EVA SKURATOWICZ

Dr. Joseph Hattrick
Superintendent



Inspire Learning for Life

MICHELLE CUDEBACK
Assistant Superintendent

STEVE MITZEL
Executive Director, Operations

SCOTT WHITMAN
Director, Business Services

APRIL HARRISON
Director, Student Services

2024-2025 District, Board, and Superintendent Goals

District Goals			
Action Steps	Improve Student Achievement	Increase the recruitment and retention of high-quality and culturally diverse staff	Create and maintain a safe, welcoming, supportive, and inclusive environment for all students and staff
	93% student graduation by 2025.	The cultural diversity of our staff will match the cultural diversity of our students by 2025	Students/staff will report a “welcoming, supportive, and inclusive environment” by 2025.

Board Goals (Optional) – Developed from self-evaluation
1)
2)
3)

Superintendent Goals			
Goal	Academic Excellence	Financial Stabilization	Improved Climate
Action Steps	Ensure quality teaching practices through ensuring all staff receive evaluations as prescribed.	Identification of potential systems changes that may have a positive impact on the current budget.	Visibility at district and community events
	Review district assessments to ensure ASD is utilizing the correct systems and measuring growth/proficiency effectively.	Establish a marketing plan to better articulate ASD’s continuum of services and encourage enrollment (revenue impact).	Increased community engagement to enhance partnerships and district visibility.
	Identify areas for improvement through ongoing data review with lead team to inform school improvement planning.	Review of the budget to identify trends that need to be modified to decrease expenses.	Establishment of parent and student advisory groups for increased engagement and collaborative decision-making.
	<i>The above actions will develop the baseline necessary to establish more specific goals/actions in subsequent years.</i>	Identify additional revenue streams through grants, programs, or other means.	Increased communication through the use of public newspaper, newsletter, and/or social media.
		Develop a long-term plan to reach required reserve.	Development of robust Emergency Management Plan



FIVE-PART EVALUATION TOOL

The Oregon School Boards Association (OSBA) and the Coalition of Oregon School Administrators (COSA) have developed a five-part tool for evaluating superintendents.

PART 1 SUPERINTENDENT PERFORMANCE STANDARDS.

These are based on the Professional Standards for Educational Leaders (PSEL, 2015) and District Level National Educational Leadership Preparation Standards (NELP, 2018) and augmented by standards jointly developed by COSA and OSBA.

PART 2 SUPERINTENDENT GOALS.

This section evaluates progress towards the superintendent’s goals established by the board and superintendent at the beginning of the evaluation cycle.

PART 3 EVIDENCE OF PERFORMANCE.

This consists of the superintendent’s self-evaluation and their regular reporting to the board on progress toward standards and goals. This area may be supported by artifacts or documents specifically in those areas where the board may lack direct knowledge of the superintendent’s performance.

PART 4 FEEDBACK ON PERFORMANCE (OPTIONAL).

This consists of a targeted feedback survey of the superintendent’s performance by selected staff and members of the community that have frequent, consistent interactions with the superintendent.

PART 5 EVALUATION SUMMARY.

This is the summary of the evaluation the board writes to share its unified message with the superintendent and the public.

Evaluation Process (Dates subject to change)

- Evaluation process approved by board on September 12, 2024.
- Superintendent will meet with board chair two times per month to discuss happenings within the district.
- Superintendent will meet with board members [~1 time per month].
- Superintendent will present self-evaluation/goals update in executive session on Jan 23 or Feb 13.
- Check-in meetings to review performance of superintendent (in executive session per ORS 192.660(2)(h)).
 - October 10, 2024
 - November 14, 2024
 - January 9, 2025
 - February 13, 2025
- Board members gather information and rank on parts 1 & 2 (February 13-March 13)
- Board reviews all information provided during March executive session and completes the evaluation.
- Board Meets with Superintendent in Executive session to provide constructive feedback.
- Board adopts a short narrative in open session in March or April (step 5).

OSEA Ashland Chapter 42 2024-2027 CBA Tentative Agreement Summary

Article 1 - Recognition

- Unchanged.

Article 2 - Management Rights

- Clarified language that requires the District to inform the Association in a timely manner if outside providers are being used to temporarily fill vacancies such as unfilled classified positions through hiring temporary workers or substitutes.

Article 3 - Association Rights and Responsibilities

- **Clarifications and improvements to language allowing Classified to discuss union issues on paid time.** Improved language that supports House Bill 2016 rights which allow classified staff and OSEA designees to conduct most union business on paid time. The Association also secured language guaranteeing union time at New Employee Orientations, Pre-Service Week, and any District-wide events.

Article 4 - Vacancies, Probationary Period, Temporary Positions, Substitute Positions, and Transfers

- **Salary step placement language that allows new staff to be placed on a step by experience, removing the “Step 3” cap.** The Appendix contains a Salary Placement Rubric that will be utilized to determine placement on the step scales based on experience. In alignment with The Oregon Pay Equity Act, we aim to ensure that all employees receive equitable step placement based on experience.
- **Appeal process for current classified to appeal their original step placement to a higher step based on experience.** For CURRENT employees not awarded proper step experience when hired or placed at the Step 3 cap, an MOU (Memorandum of Understanding) was agreed to allowing current employees to submit documentation showing previous experience for their initial step placement to be re-evaluated.
- **“Just Cause” for Probationary Employees.** The language that probationary employees serve at the discretion of the District and may be terminated without restriction has been struck from the CBA. All employees receive Just Cause and the rights to the progressive disciplinary process so long as it is required in state law.
- Clarified language around promotions and demotions and working out of classification.
- **Added subsection for Restricted and District Substitute Teaching (formerly Emergency Substitute)**
 - This moves the language in the MOU for classified working as a substitute teacher into the CBA, making it a permanent process. This ensures that the classified who are sponsored by the district are paid the substitute teacher rate on an hourly basis. The language also defines substituting as anytime classified are replacing an absent teacher for one hour or longer.

OSEA Ashland Chapter 42 2024-2027 CBA Tentative Agreement Summary

Article 5 - Discipline and Dismissal (formerly Performance Management)

- **Clarification between non-disciplinary “coaching” and the Progressive Discipline process.** An improved chart and language for Progressive Discipline with levels clearly outlined including a distinction between non-disciplinary and disciplinary levels.
 - The district indicated their plan to provide every supervisor with the CBA and instructions on utilizing the progressive discipline process.
- **Drug and alcohol testing.** While it was a goal of ours to add drug and alcohol testing language to the CBA, it will be located in board policy and the handbook, with language ensuring classified have input. We agreed to this because the superintendent will be moving on updating the board policy at the next school board meeting and verbally committed (can be viewed on the recorded session 8/14/24) to meeting all the concerns surrounding drug and alcohol testing that we expressed during the bargaining process such as the legal standard for determining “reasonable suspicion”, ensuring rights to union representation, and clarification/mutual understanding of when employees have a reasonable expectation of privacy against mandatory searches and seizure of personal property (constitutionally protected).

Article 6 - Working Conditions

- **Updated meal and break periods schedule** - meal breaks and 15-min breaks are now aligned with BOLI standards, including a chart and clear language to make sure all meals/breaks are scheduled evenly throughout the day.
- **Secured language to allow for remote work during emergency closures** and clarify requests to work in the event of emergency closures.
- **Removed the 3-day overtime cap** for staff required to work on-site during an emergency closure and receive pay at 1 ½ times their normal pay rate.

Article TBD - Safety

- **New language guaranteeing safety protections.** This is a new article in our CBA The District commits to following federal and state laws, such as Work Shouldn't Hurt laws. Having this in the contract makes safety laws enforceable through the collective bargaining agreement..

Article TBD - Nondiscrimination & Harassment/Bullying

- **New article protecting employees from discrimination, harassment, and bullying.** Language was moved from Article 6 Working Conditions and strengthened to include the board policy against discrimination as well as providing the way an employee can report with union representation and not fear retaliation.

OSEA Ashland Chapter 42 2024-2027 CBA

Tentative Agreement Summary

Transportation:

- **Transportation Article:** The District did not agree to a new transportation article, but improvements regarding transportation language were secured elsewhere. Language for Pre-trip, post-trip and route gaps can be found in Article 11- Compensation.
- **One rate of pay for bus drivers:** Also see Article 11 for new pay for bus wait/training which will all be one rate of pay, the driver's normal pay rate, vs. previous pay rates which set much lower pay for wait and training time.
- **MOU guaranteeing a bargaining process for updating Transportation Work Rules** The transportation work rules will remain a separate document from the Contract, but will be posted within the Transportation Department. As a compromise to putting key portions of these in the contract, we agreed to an MOU that clarifies that portions of the work rules related to mandatory subjects of bargaining will be bargained through the Labor Management Committee, to mutually develop updated Work Rules. The first meeting being no later than December 31st, 2024 - with representation from bus drivers on the committee when bargain. *See attached MOU.*

Article 7 - Overtime, Compensatory Time, Call-Back Time , Extra Duty Compensation

- **4/10 schedules for summer work.** We secured language to provide 12-month staff opportunity to request their schedule be adjusted to a 4/10 shift, with supervisor's approval, when school is out of session.
- **Overtime by voluntary rotation.** In relation to The Oregon Equal Pay Act, we wanted to make sure the overtime opportunities are provided equitably and first by volunteer basis before being assigned.
- **Annual Overtime payout of unused compensatory time.** Language to create a process to log compensatory time which if not used within the year that it is earned will be paid out by June 30th. If compensatory time is earned as overtime it will be compensated as overtime (1 ½ times regular pay)
- **Extra Duty language moved to new article.**

Article TBD - Extra Duty Assignments

- **Classified equity in bidding for Extra Duty assignments.** This new language should ensure that classified employees are given equal consideration for extra duty assignments and are paid equitably across the District and between all bargaining groups. We originally proposed language for athletic leave so that classified who miss regular work due to an extra duty assignment don't need to flex or use their own leave, but as a compromise, we agreed to language giving staff more flexibility to use "flex" time when appropriate (*flex time is one-to-one time as regular work schedule and must be used within the same work week*)

Article 8 - Layoff and Re-Employment

- Unchanged. Housekeeping edits.

OSEA Ashland Chapter 42 2024-2027 CBA

Tentative Agreement Summary

Article 9 - Personnel And Working Files Records

- **Transparency around Personnel and Working Files:** Clarifies what and how personnel and working files are created, stored and destroyed. Transparency in how information about employees is collected.
- **Establishes new processes for removing old derogatory information from Personnel and Working Files:** Strengthens the process to have files viewed and/or removed when appropriate.

Article 10 - Grievance Procedure

- **Clarifications and improvements regarding the grievance procedure.** Language making the School Board step of the grievance procedure optional.

Article 11 - Compensation

- **4% COLA for the 2024-25 School Year that prioritizes raises for classified.** The District's offer, though lower than we would like to accept, is nevertheless significant given the current state of the District's current fiscal situation, and is an increase from their previous 3% offers. What's true is the District's budget is currently running a deficit. Thus, movement from their initial offer is significant and shows that despite not having the funds to offer us the increases we need and deserve, they have offered more as a show of good faith. For these reasons we, your bargaining team, have accepted this offer.
- **Additional \$1.00 targeted raises for hard to fill positions:** The following classifications that are difficult to fill positions and in an effort to move away from hiring temporary employees from an agency, they will receive a \$1 per hour increase, applied before the 4% COLA: all custodians (Lead, Head and Assistant Custodians), and the Food Service Worker classification.
- **One rate of pay for Bus Drivers:** All transportation classifications that were paid the lower wait time, training time, or standby rate for time working but not driving have been removed. All transportation classified employees will receive their regular rate of pay for all work.

Article 12 - Holidays

- **New Juneteenth Paid Holiday.** We secured Juneteenth (Freedom Day) as a paid holiday! This is an important win to celebrate this important historical holiday.

OSEA Ashland Chapter 42 2024-2027 CBA Tentative Agreement Summary

Article 13 - Leaves

- **Increases in vacation accruals (depending on employment years)** For 12-month employees who accrue vacation, we made sure it was in alignment with confidential employees, giving most 12-month employees with 21 years or less experience more vacation days per year.
- **Vacation Accruals/Cap:** Updated language so that days accrue on a monthly basis vs. front loaded and giving employees until the end of the fiscal year each year to use vacation days above the cap before it stops accruing. We found that because of the nature of the school year, 12-month employees were subject to losing a lot of accrued vacation simply because they couldn't take time off in high need times.
- **Updated definitions for qualification for sick leave and the definition of family.** We also secured some progressive language as it related to the Oregon Family Leave Act which expands the definitions of "Family Leave" and how sick leave can be utilized.
- Other clarifications and updates on usage of leave such as clarification regarding how Professional Development can be paid.

Article 14 - Insurance

- **Maintains current benefits with just minor updates/changes:** The District requested pulling language regarding the District paying 100% of the cost for a tobacco cessation program, we agreed because it's been a long held part of our insurance plan that the Insurance Committee consistently maintains. No other changes were made.

Article 15 - Supplemental Retirement

- **NEW Sick Leave Payout for Retiring Employee with 15 Years Experience:** Bargaining unit employees who retire from Ashland School District with fifteen (15) years of continuous service shall be paid a bonus in recognition of the employee's years of service equivalent to \$4.00 for each hour of accumulated sick leave at the time of retirement. This payout used to only apply to employees hired before July 1, 2000.

Article 16 - Standing Committees

- Minor changes/updates.
- **New language added for Equity Committee.** We secured language that would ensure classified are included and represented on the Equity Committee.

Article 17 - Strikes and Lockouts

- Unchanged.

Article 18 - Miscellaneous

- Added clarifying language stating required trainings are paid and should be scheduled during regular work hours whenever possible.

OSEA Ashland Chapter 42 2024-2027 CBA

Tentative Agreement Summary

Article 19 - Modification of Agreement

- Minor changes to clarify language.

Article 20 - Existing Conditions

- Updated language to ensure that the District agrees to follow all applicable federal and state laws.

Article 21 - Separability of Provisions

- Unchanged.

Article 22 - Duration of Agreement

- **Three year Contract with reopeners to reopen wage negotiations each year.** The new contract will be Effective from July 1st, 2024 through June 30th, 2027, with wage increases paid retroactive to July 1, 2024. Each spring, the parties will negotiate compensation with the goal of the district being in a better financial spot - giving us more leverage to be able to right-size all classified wages
- **Guarantee to phase out Temporary Subcontractors completing bargaining unit work.** Before the expiration of this agreement the District shall cease utilizing all non-bargaining unit workers in Food Service and Custodial unless mutually agreed otherwise.

Appendices:

- **Appendix A - Legacy Supplemental Retirement Employee Grandfathered Supplemental Retirement.** Minor updates.
- **Appendix B - Grievance Process Flowchart.** Updates to make the school board step optional.
- **Appendix C-1 2024-2025 Classified Salary Schedule:** draft 2024-2025 Salary Schedule
- **Appendices D-1 to D-4:** updated longevity schedules coming soon (no changes to formulas).
- **Appendix E - Reclassification Review Flowchart:** No changes.
- **Appendix TBD - Salary Step Placement Rubric:** New appendix showing a uniform process for awarding step experience for new hires, job changes, etc.
- **Appendix TBD - Grievance Form:** New appendix including a sample grievance template.

OSEA & ASD 2024-2027 Collective Bargaining Agreement

*Draft - Housekeeping Committee will reformat after ratification

Tentative Agreement Key:

New Language - new language to be added

Removed Language - old language to remove

Housekeeping - Typos, Grammar, and formatting *housekeeping committee will do a full review and reformat upon ratification

Key: **New Language** **Removed Language** **Housekeeping**

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***Draft - Housekeeping Committee will update after ratification**

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Key: **New Language** **Removed Language** **Housekeeping**

ARTICLE 1 - RECOGNITION

- A. The Ashland School District #5/Board recognizes OSEA Ashland Chapter 42 as the exclusive bargaining representative on wages, hours and conditions of employment for all classified employees as well as employees on the one thousand thirty-nine (1039) option working in a classified bargaining unit position.
- B. Administrators, supervisors, academically licensed employees, confidential employees, substitutes, and temporary employees are specifically excluded from the bargaining unit.
1. **Administrators** are employees having authority in the interest of the district to hire, transfer, suspend, lay off, recall, promote, discharge, assign, reward or discipline other employees. They may also direct employees, adjust their grievances, or recommend such action, if in connection therewith. The exercise of such authority is not of a routine or clerical nature but requires the use of independent judgment.
 2. **Supervisors** are employees of the District who possess authority to formulate and carry out management decisions or who represent management's interests by taking or effectively recommending discretionary actions that control or implement district policy, and who have discretion in the performance of these management responsibilities beyond the routine discharge of duties. Supervisors have the authority in the interest of the District to recommend hires, transfers, suspensions, promotions, discharges, assignments, or discipline for employees under their direction.
 3. **Academically licensed** employees are employees such as administrators, teachers, or other professional employees who must maintain licensure through the TSPC or other professional organizations as a condition of continued employment.
 4. **Confidential employees** are employees whose job duties require that they work directly with administrators and/or school board members in areas related to the collective bargaining process and would be in attendance at such times when meetings occur to assist the management of the District in preparation for collective bargaining.
 5. **Substitutes** are employees hired during the year to replace bargaining unit employees (full-time or part-time) who are on approved paid or unpaid leave(s) of not more than twelve (12) calendar months.
 6. **Temporary employees** are employees hired for a specific period of time not to exceed one-hundred-twenty (120) days worked within a twelve (12) month period commencing with the first day worked July 1 through June 30, of each year, after which they will become probationary members of the unit per the Collective Bargaining Agreement. This category will include seasonal employees hired only for summer work. The one-hundred-twenty (120) days worked does not apply to laid-off employees who may be working a temporary assignment during the period they remain on the re-employment list.

Key: **New Language** **Removed Language** **Housekeeping**

ARTICLE 2 - MANAGEMENT RIGHTS

A. Managerial Responsibilities

It is recognized that the Ashland School Board (Board) has and will continue to retain the rights and responsibilities to operate and manage the school system and its programs, facilities, properties and job-related activities of its employees. Without limiting the generality of the foregoing, it is expressly recognized that the Board's operational and managerial responsibilities include:

1. The right to determine location of the schools and other facilities of the school system including the right to establish new facilities and relocate or close old facilities.
2. The determination of the financial policies of the District, including general accounting procedures, inventory of supplies and equipment, procedures and public relations.
3. The determination of the management, supervisory or administrative organization of each school or facility in the system and the selection of employees for promotion to supervisory, management or administrative positions.
4. The maintenance of discipline and control and the use of the school system property and facilities.
5. The determination of safety, health and property protection measures where legal responsibility of the Board or other governmental unit is involved.
6. The right to enforce the rules and regulations now in effect, and to establish new rules and regulations from time to time not in conflict with this Agreement.
7. The direction and arrangement of all the working forces in the system including the right to hire, suspend, discharge, discipline, or transfer employees.
8. The creation, combination, modification or elimination of any position deemed advisable by the Board.
9. The determination of the size of the **workforce**, the allocation and assignment of work to employees, the determination of policies affecting the selection of employees, and the establishment of quality standards and judgment of employee performance.
10. The determination of the layout and the equipment to be used and the right to plan, direct and control work schedules, and the work week.

B. Subcontracting

The District shall provide written notice to the Association of the District's intent to consider subcontracting for services normally and customarily performed by classified bargaining unit members at least ninety (90) calendar days prior to any formal action by the Board to enter into any contract for such services. The Association shall have the opportunity to make recommendations regarding such action and/or bargain its impact.

Key: **New Language** **Removed Language** **Housekeeping**

At least two (2) weeks prior to the issuance of a Request for Proposal (RFP) to subcontract, the Association shall be afforded the opportunity to provide input on the contents of the RFP.

The District may contract with a specialist in an emergency, such as a plumber, if the District requires immediate service and there is no existing employee in the position or the current employee refused to report to duty.

C. **Temporary Contracted Service Providers**

The District's needs for **augmenting** **covering** services within a classification, **by engaging with an outside provider to provide coverage for open bargaining unit positions**, shall be implemented only after:

1. Utilizing all personnel in the Association's specific classifications; and
2. **The District will notify the Association President and the OSEA Field Representative in writing if an open position is filled by an outside provider after twenty (20) working days if the opening is expected to continue.**
~~The Association has been given thirty (30) days written notice of such need to hire or contract with a specialist and an opportunity to collaboratively make recommendations regarding such proposal and/or its impact. When unforeseen circumstances do not allow thirty (30) days prior notice, the District will provide the Association president or the designee with verbal notice to be followed by written notice within three (3) working days~~
3. ~~The District may contract with a specialist in an emergency, such as a plumber, if the District requires immediate service and there is no existing employee in the position or the current employee refused to report to duty.~~

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ARTICLE 3 - ASSOCIATION RIGHTS AND RESPONSIBILITIES

- A. The Association shall represent classified employees within the bargaining unit equally and without discrimination.
- B. The Association or its committees may be allowed use of district facilities at no cost for meetings provided:
1. Prior request is made through the building supervisor.
 2. No alcohol, controlled substances, tobacco or tobacco-related products are allowed on/in district (school owned) buildings, vehicles or grounds and may not be visible on/in an employee's personal property.
 3. OSEA Ashland Chapter 42 will be held responsible for full restitution in event of any damage to buildings, grounds or equipment.
 4. No outside use of cafeteria equipment while otherwise in use, unless used by cafeteria staff or under staff supervision. Such use must be approved by the Superintendent.
 5. Subject to use limitation due to fuel or energy shortage.
- C. The Association may be allowed use of such office equipment, including computers, as needed to provide duplicating and information to the bargaining unit employees provided:
1. Equipment is available and not in use by the District.
 2. Equipment is not removed from the buildings.
 3. Association reimburses the District for any cost attributable to its use of supplies, or materials. Charges for equipment will depend upon the type of usage as determined by the Superintendent.
- D. The Association will be assigned existing bulletin board space at each worksite, in a location easily accessible to staff. Any additional bulletin board space will be subject to the Superintendent's approval as to placement and size, and cost will be borne by the Association.
- E. By the tenth (10th) day after a new classified employee begins employment, and for all employees every one hundred and twenty (120) days, the District shall provide, if available, the OSEA Chapter President, the OSEA Field Representative, and the OSEA Director of Fiscal Operations at classified@osea.org the following information for the new employee: name, date of hire, position title, worksite location, annual salary, number of months worked, number paychecks per year, work phone number, personal phone number, personal address, and personal email. In addition, the OSEA Director of Fiscal Operations at classified@osea.org shall be provided with the last four numbers of the employee Social Security number (SSN), and District employee ID number or OSEA's CE number

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information. Information shall be provided in an editable digital file format.

The District will provide the Association and Chapter President with an alphabetical listing of all bargaining unit members including hire date, home and work phone numbers, home mailing address, birth date, classification, step placement, hourly rate, insurance stipend, number of working hours currently scheduled, job site, and the employee's status (temporary or permanent). Such listing will be provided during the month of October.

F. Within ten (10) days of hire, the District agrees to furnish a list of new employees eligible for the bargaining unit, and every one hundred twenty (120) calendar days a list of all employees in the bargaining unit. This list shall be furnished to the Association Chapter President and the OSEA Director of Fiscal Operation with an editable digital spreadsheet containing the following information:

1. **The employees name**

2. **Contact information, including cell, home and work phone numbers, personal (if known) and work email addresses, and home and personal mailing address.**

3. **Classification, title, current step on the wage scheduled, and worksite.**

F. The Association shall be allowed to use the District courier and district e-mail for the distribution of official notices and announcements

G. Whenever any representative of Chapter 42 or any bargaining unit employee participates during working hours in investigatory meetings, disciplinary proceedings, grievance proceedings, arbitration preparation or arbitration hearings, labor-management meetings, **contract negotiations**, or other contract committee meetings, the employee shall suffer no loss in pay, or benefits, nor shall the Association incur any cost for substitutes. For district scheduled meetings (i.e. including, but not limited to Labor Management, Safety Committee, disciplinary, investigatory meetings or contract negotiations) scheduled outside the participating employee's regular work time, the employee shall have the option of overtime or compensatory time or flex time.

I. Whenever any representative of Chapter 42 or any bargaining unit employee participates during work hours in jointly scheduled negotiations, the employee shall suffer no loss in pay.

H. **OSEA Ashland Chapter 42 Release Time**

Release Time:

All release time shall be requested through established District leave process.

1. **OSEA Ashland Chapter 42 Release Time:**

The Association President and the designee will be granted one (1) day of release time each month for Ashland Chapter 42 Association-related activities each fiscal year. The Association will reimburse the District for the cost of the substitute filling in for the absent representative.

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2. **OSEA State Release Time**

A Designated Representative may be allowed release time to attend outside trainings, activities or to serve as a full-time representative of OSEA without loss of District compensation and benefits (insurance and retirement). The Designated Representative may use accrued leave time for short-term attendance at such events or OSEA shall reimburse the District for any compensation and benefits.

- I. Contingent upon the daily needs of their buildings, employees shall be allowed to attend Association meetings during their working hours. Time missed shall be mutually rescheduled within the day with the supervisor prior to the leave. It is recognized that the security of the building and pre-scheduled events have priority. Supervisors reserve the right to determine how many employees may be gone at a time.

J. New Employee Orientation

The District shall provide the designated Association Representative with no less than sixty (60) minutes and up to one-hundred twenty (120) minutes to meet with new employees within thirty (30) calendar days from the date of hire to introduce the new employee(s) to the Association and the Collective Bargaining Agreement. This meeting shall be on regular work time without loss of compensation or benefits.

L. An officer of OSEA Chapter 42 or the designee may meet with new employees at the welcome back breakfast that occurs during the new hire orientation to introduce new employees to the Union and the Union contract. This meeting shall not exceed thirty (30) minutes and shall be on paid time.

1. **New Employee Orientation:** The District shall provide the designated Association Representative with no less than thirty (30) minutes and up to one hundred twenty (120) minutes to meet with the new employees within thirty (30) calendar days from the date of hire to introduce the new

K. Pre Service Week

An officer of OSEA Chapter 42 or the designee may meet with bargaining unit employees during pre-service week. This meeting shall not exceed thirty (30) minutes and shall be on paid time. The District shall also provide a New Hire Orientation, as described in Section J.M. during pre-service week. An officer of OSEA Chapter 42 will also be given at least five (5) minutes to speak at any all-staff event.

- L. If there is a District-wide orientation, event, or activity at the beginning of the academic year, OSEA shall be permitted to set up a table to meet directly with employees before, after, and during breaks.

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ARTICLE 4 - VACANCIES, PROBATIONARY PERIOD, TEMPORARY POSITIONS, SUBSTITUTE POSITIONS, AND TRANSFERS

A. Vacancies in the Classified Service

The District recognizes that it is desirable to consider the interests, aspirations, and qualifications of its classified staff in making assignments. Therefore, the District declares its support of giving strong consideration to its own classified staff when filling vacancies within the bargaining unit.

When open positions are posted, whether temporary or probationary within the bargaining unit, the District will give first consideration to current classified bargaining unit employees. Such postings shall be **emailed to the Association President and all classified employees,** printed placed on bulletin boards as specified in the contract, **in major buildings and/or classified employee workplaces,** posted on the District website, and on district-adopted online hiring sites as appropriate, for not less than seven (7) working days.

~~Copies of the postings shall be provided to the Association president or designee when job postings are distributed. During the summer vacation period, such postings shall be mailed to the Association president or designee, posted at the District Office, posted on the website, and posted on the district adopted online hiring sites as appropriate.~~

Bargaining unit employees who have complied with the regular application procedures and meet minimum qualifications of the job description will be interviewed before any out-of-district applicants. When two (2) or more in-district applicants for a vacant position are equally qualified to fill the position as determined by the District, district-wide seniority will be the basis for assignment. Criteria to be used when determining qualifications shall include:

- Current job classification;
- Employee evaluations;
- Experience/knowledge/abilities.

Upon the employee's written request, the employee will receive a written explanation from the District of the reason why the employee was not selected.

If no in-district applicants are considered to be qualified, the District may then interview out-of-district applicants.

B. Probationary Period

The parties recognize that the probationary period is an integral part of the employee selection process.

Every employee hired into the bargaining unit shall serve a probationary period of six (6) months. However, the District may, at its discretion by written notice, extend non-probationary status to a new employee at the end of three (3) months of service.

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Probationary employees shall receive a performance review midway through the probationary period. Prior to the conclusion of the probationary period, a written evaluation will be placed in the employee's personnel file.

If Oregon statute no longer mandates just cause for probationary classified employees, the District will have the unrestricted right to terminate probationary employees following due process.

C. Temporary Employee Positions

A **temporary** ~~Temporary~~ employee position is defined as a position with a beginning and ending date not to exceed one-hundred-twenty (120) workdays in a twelve (12) month period. If a position extends beyond one-hundred-twenty (120) workdays, it shall be considered a bargaining unit position.

~~Non-bargaining unit temporary employees hired to fill a bargaining unit position temporarily will be paid at Step 1 of the Classified Salary Schedule.~~ Should the temporary employee be hired into **a probationary** ~~the~~ position, seniority shall be awarded as of the first day of work as a temporary employee.

D. Temporary Reassignment

When a bargaining unit employee is hired to fill a temporary position in a higher pay range, the employee shall be placed at a step in the new classification based on the Salary Step Placement Rubric outlined in Appendix TBD or a step which provides a salary increase equivalent to at least one (1) full step on the salary schedule, whichever is greater. While in the temporary assignment or position, the regular employee will retain all rights and privileges provided in the bargaining Agreement.

If the temporary reassignment was to a temporary position, and the position becomes permanent, the regular employee will have the option to remain in the new position or return to the employee's previously held position.

E. Transfers

A bargaining unit employee may accept a transfer to a temporary assignment or position. While in the temporary assignment or position, the regular employee will retain all rights and privileges provided in the bargaining Agreement with the exception of compensation and benefits which will be determined by the position. At such time as a temporary position becomes permanent, the regular employee will have the option to remain in the new position, with compensation and benefits as per the bargaining Agreement, or return to the employee's previously held position.

F. Promotion

Bargaining unit employees promoted into a higher classification shall serve a trial period of three (3) months in the higher classification.

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If an employee does not successfully complete the **employee's** trial period, the employee shall be returned to the employee's previous position or to a position in the same job classification in the District with the same number of hours.

When an employee is promoted to a position in a higher salary range, the employee shall be placed **at a step in the new classification based on the Salary Step Placement Rubric outlined in Appendix TBD or** on a step which provides a salary increase equivalent to **at least** one (1) **full** step on the salary schedule, or to the first step of the higher salary range, whichever is greater.

G. Voluntary Demotion

An employee who voluntarily changes to a position in a lower salary range shall be placed **on the step in accordance with Article 5 Section C** on the new salary scale at the same step in the new classification based on the Salary Step Placement Rubric outlined in Appendix TBD but no less than the same step as the employee's previous job classification.

H. Involuntary Demotion

An employee who involuntarily changes to a position in a lower salary range due to disciplinary action shall be placed on the **new salary scale at the** same step as the employee's previous job classification.

An employee who involuntarily changes to a position in a lower salary range due to non-disciplinary action shall be placed on a step in the new classification that will be determined by mutual agreement between the Association and the District, with the intent to maintain the employee's current rate of pay and advancement as appropriate.

I. Reclassification

When the **Classification Review Committee** **District** reclassifies a position so as to place it in a higher salary range, the incumbent shall remain in that position provided the employee is qualified.

J. Working Out of Classification

When a bargaining unit employee is assigned to a position in a higher salary range for four (4) or more working days, the employee shall be placed at an hourly equivalent **step or the next step above in the new classification, whichever is greater unless the employee has previous experience paid at the lowest step of that salary range which provides a salary increase equal to at least one (1) step increase.** If the employee has previous experience, salary shall be calculated based on the Salary Step Placement Rubric outlined in Appendix TBA. This salary shall be instituted on the fourth (4th) working day of the assignment **or made retroactive once an experience determination review has been completed.**

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K. Placement on Schedule

New employees will be given credit for the amount of outside experience up to a maximum of three (3) steps on the classified salary schedule provided all employment verification has been received and verified by their first day of employment. If prior experience has not been received and verified, the employee will be placed on Step 1 of the classified salary schedule until the end of the employee's probationary period. Exceptions to placement of new employees shall be at the discretion of the Superintendent and the Superintendent will inform the Association President and Labor-Management.

New employees will be placed on the salary schedule following the Salary Step Placement Rubric outlined in Appendix TBA provided all employment verification has been received and verified by their first day of employment. If prior experience has not been received and verified, the employee will be placed on Step 1 of the classified salary schedule until the end of the employee's probationary period. Exceptions to placement of new employees shall be at the discretion of the Superintendent and the Superintendent will inform the Association President and Labor-Management.

Appeal of original placement must be requested within one year of hire date.

L. Evaluations

Permanent classified bargaining unit employees will be evaluated at least every other year based upon their job performance as it relates to job description. Formal evaluations shall be completed by the employee's immediate management supervisor by May 31. A record of the evaluation will be placed in the employee's personnel file in conformance with Article 9.

M. Job Descriptions

The District agrees to notify the Association President and OSEA Field Representative in writing whenever a new classified position is created. Job descriptions for newly created or reclassified positions shall be developed by the District. The District shall bargain the salary placement of the position with the Association.

N. Restricted and District Substitute Teaching

The Restricted and District Substitute Teaching License is a license that permits a qualified individual to substitute teach in a prekindergarten through grade twelve (12) Oregon public school district, education service district, or charter school assignment. The following shall apply to employees in the bargaining unit represented by the Association who receive a Restricted and District Substitute License through the state of Oregon:

1. The District will identify the need for Restricted and District Substitutes by site. Staff can express interest in writing and the Administrators will recommend classified staff members for Restricted and District Substitute Within five (5) business days of receipt of the completed application for the license, the District shall provide the employee with the following documentation for the employee to submit with their application to TSPC, as required by Oregon Administrative Rule, a written statement:

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- a. Describing the extenuating circumstances preventing the District from hiring a teacher holding a Restricted Substitute, Substitute, or other non-provisional teaching license appropriate for the assignment and how the issuance of the Restricted and District Substitute license will protect the District's programs or students;
 - b. Explaining how the qualifications or services of the applicant will resolve the extenuating circumstances;
 - c. Assuring the Commission that the District will obtain the license for the educator prior to assignment within the District or prior to the ninety-first (91st) day after the date of application for licensure;
 - d. Assuring the Commission that a designated administrator will provide training, guidance, and supervision of the educator to support the educator's service in the assigned schools; and
 - e. Assuring the Commission that the District will determine the educator's interest in pursuing a teaching career and provide guidance in this pursuit.
2. For district sponsored applications, the District shall pay expenses associated with applying for and obtaining, the TSPC Restricted and District substitute teaching license, including but not limited to, any application fees, licensing fees, and postage. Any sponsored staff who has incurred expenses through TSPC license application, may obtain reimbursement, by providing the District with documentation of expenses.
 3. Classified substitutes will typically receive assignments at the site where they regularly work but may be considered at other sites with the Administrator's approval.
 4. Prior to the employee's first day of work as a teaching substitute, the District shall provide the employee with a written plan for administrator support that will address emergency procedures and potential critical classroom situations. At the beginning of each new assignment a written lesson plan for the specific classroom assignment will be provided as appropriate.
 - a. If the Administrator identifies training that is necessary to prepare the Restricted and District substitute to teach in the classroom, the training will be paid at the substitute teaching rate.
 5. The daily and half-day (1/2 day) wage rate for employees who perform work as Restricted and District substitute teachers shall be equivalent to the base teacher salary hourly rate.
 6. Substituting is defined as replacing a teacher who is absent from work for one (1) hour or longer.
 7. Classified substitutes who work a minimum of one (1) hour will be paid the District hourly rate for actual time worked.

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8. A Restricted and District substitute teacher will not be assigned to a continuing assignment of more than ten (10) consecutive days.
9. Hours worked by an employee in an emergency teaching substitute position shall be combined with hours worked in any classified position and shall count toward the employee's total hours worked for the purposes of calculating leave accruals.
10. Overtime will be paid as required by law.
11. When working as an emergency teaching substitute, employees will receive all materials necessary to perform their jobs and maintain student and staff safety.

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ARTICLE 5 - DISCIPLINE AND DISMISSAL PERFORMANCE MANAGEMENT

The District will provide a work environment that fosters successful, productive employees through the establishment of an effective performance management process. This process **consists** ~~is comprised~~ of effective communication, establishing clear expectations, providing opportunities for employee development, and monitoring and evaluating performance.

No employee shall be disciplined without Just Cause and Progressive Discipline. The Discipline process shall consist of six (6) possible levels ranging from verbal notice/counseling to termination. Supervisors should adhere to the **levels steps** listed in the chart below once a level of discipline is utilized. However, progressive discipline **may be flexible**, ~~is not inflexible~~. A supervisor is not required to utilize all six (6) levels of discipline if the situation warrants a more severe level of discipline.

If the problem is behavioral, there is no need to give the employee time to improve. The supervisor may require the employee to immediately cease and desist from engaging in the behavior. If the behavior is repeated, the supervisor may progress to the appropriate level of discipline.

The supervisor/administrator will notify the employee of the right to an Association representative during the progressive discipline process. All information forming the basis for disciplinary action will be made available to the employee.

The District may place an employee on administrative leave with pay pending the outcome of an investigation into the employee's alleged misconduct.

If the District has reason to discipline an employee, they shall make all possible efforts to impose such discipline privately and confidentially.

Non-Disciplinary Coaching Levels for Classified Employees		
Level	Action	Note
1	Verbal Coaching	<ul style="list-style-type: none">• Representation optional• May be documented in Working File• Non-Grievable
2	Letter of Direction	

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Progressive Discipline Levels for Classified Employees		
Level	Action	Note
1	Verbal Warning	<ul style="list-style-type: none"> • Decline/Accept representation letter • Documented in Personnel File • Grievable
2	Letter of Concern/Reprimand	
3	Plan of Assistance	
4	Suspension/Demotion	
5	Last Chance Agreement	
6	Termination	

Progressive Discipline Steps for Classified Employees	
Discipline Level	Action
1	Verbal Notice/Counseling
2	Letter of Concern/Direction
3	Letter of reprimand
4	Suspension/Demotion
5	Last Chance Agreement
6	Termination

A. Process for Written Documentation for Performance Issues

If and when performance concerns are identified, the supervisor/administrator will communicate with the employee at the earliest opportunity and discuss suggestions for performance improvement. If the concern is related to a lack of knowledge or skill, the employee may be given an opportunity to gain the knowledge/skill.

1. The supervisor/administrator shall inform the employee when poor performance is observed, state performance expectations and cite specifics on improvement goals.
2. A written communication to the employee will follow, memorializing the conversation, and the employee will be given the opportunity to correct the deficiencies.

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3. To formally clarify performance expectations and provide a guide for performance improvement, a “plan of assistance” may be initiated. The plan of assistance will include:
 - a. Specific performance expectations;
 - b. Timeline expected for correction of areas of concern or deficiencies;
 - c. Timeline for feedback from supervisor/administrator discussing progress achieved or continued areas of concern;
 - d. Resources available for assistance from the district/supervisor/administrator;
 - e. Reasonable time for improvement before considering dismissal; and
 - f. Appropriate consequences should the deficiencies not be corrected to meet position standards and expectations.
4. If performance does not improve, the District may take action up to and including dismissal.
- ~~5. Dismissal, disciplinary suspension or disciplinary demotion of a non-probationary employee will not be done without cause.~~

B. Misconduct

Progressive discipline is not an appropriate course of action for all circumstances. There may be occurrences of misconduct where immediate formal action is warranted.

Misconduct is an intentional or willful violation of a clear rule of the District of which the employee was aware, or which is obvious, such as the prohibition on theft or dishonesty.

When incidents of misconduct are suspected, a formal investigation of the incident or occurrences will be conducted.

1. The District shall notify the employee of the right to have an Association representative during this process. All information forming the basis for disciplinary action will be made available to the employee.
- ~~2. Dismissal, disciplinary suspension or disciplinary demotion of a non-probationary employee will not be done without cause.~~

C. **Drug & Alcohol Testing**

The parties recognize the importance to the District, to employees, and to the students and patrons of the District that the workforce remains free of the effects of illegal drugs or controlled substances on the job. The District will provide opportunity for bargaining unit input into the District agency-wide process for following relevant statute and

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regulations for drug and alcohol testing in the workplace. When there is reasonable suspicion that an employee may be under the influence of alcohol, illegal or controlled substances in the workplace, the process outlined in the Board policy and staff handbook will be followed.

ARTICLE 6 - WORKING CONDITIONS

A. Work Week

The normal full-time workweek shall consist of forty (40) hours within the designated workweek, worked on the basis of five (5) eight (8) hour days unless otherwise assigned. To the extent consistent with the operational needs and requirements of the District, such workdays shall be consecutive as scheduled by the District. To the extent consistent with the operational needs and requirements of the District, the District will schedule work on a Monday through Friday basis. However, the workweek shall begin at 12:01 a.m. on Saturday and end on Friday at 12:00 midnight. The District reserves the sole discretion over operational needs and requirements and the pursuant scheduling of bargaining unit employees on other than a consecutive workday schedule or other than a Monday through Friday basis. Nothing in this Article or any part of the Agreement shall be construed as a guarantee of hours of work.

B. Meal and Rest Periods

A bargaining unit employee working five (5) or more hours per day shall receive an unpaid duty-free meal period of not less than thirty (30) minutes. Bargaining unit employees shall receive duty free meal and rest period(s) as outlined in the chart below. A meal period shall be unpaid and not less than thirty (30) minutes. A rest period shall be paid and not less than fifteen (15) minutes. If the employee is required to perform a task during the meal period, the employee will be compensated for all time worked during the meal period, and/or the entire meal period taken over. This section will not apply to employees assigned to a split shift. Employees shall be allowed a fifteen (15) minute paid rest period during each four (4) hour work period. Such rest period shall normally be provided near the middle of each four (4) hour shift. When possible, rest and meal periods shall be scheduled evenly throughout the shift, no less than one (1) hour from beginning or end of shift. The immediate supervisor shall determine when the rest period is to be scheduled, and provide coverage if needed, and how many employees may be off at any one time.

Hours of work	Rest Period	Meal Period
2 hrs or less	0	0
2 hrs 1 min - 4 hrs 59 min	1	0
5 hrs - 6 hours	1	1
6 hrs 1 min - 10 hrs	2	1
10 hrs 1 min - 13 hrs 59 min	3	1
14 hrs	3	2

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C. Re-Employment Notification

School year employees will be notified by May 31 of their scheduled return date, unless unforeseen circumstances arise at which time employees will be notified as soon as possible.

D. Annual Job Information

The following information shall be submitted electronically via the appropriate district system to all bargaining unit employees by **October 15th** **September 30** of each year: Hourly/monthly/annual rate of pay; total scheduled workdays; total years worked in the District; **classified seniority number**; total used/unused sick leave days and longevity status.

~~E. Non-Discrimination *moving to new article~~

~~The District agrees that employees shall not be discriminated against by reason of race, color, creed, sex, sexual preference, national origin, political or religious affiliations, physical handicap, or activities associated with the employee's union.~~

~~F. Workplace Safety *moving to new article~~

~~If an employee is aware of unsafe or unhealthy working conditions, the employee shall report such condition in writing to the District Safety Committee. (See Article 16 - Standing Committees)~~

E. Work Schedules

Should a change in work schedule be required, employees will be given a minimum of three (3) days' notice when possible. However, if the employee is available, the employee may begin the new schedule immediately.

F. Emergency Closures

- a. All twelve (12) month employees are expected to report to work on emergency closure days if it is safe to travel. **Twelve (12) month employees may work remotely upon supervisor's approval**
- b. Should twelve (12) month employees be unable to report, they may utilize accrued vacation, personal leave, unpaid leave, or compensatory time. If a twelve (12) month employee is ill on an emergency closure day, the employee may utilize accrued sick leave. If a twelve (12) month employee is on pre-approved leave, the employee will not be required to report to work on emergency closure days.
- c. All twelve (12) month employees, as well as those employees working fewer than twelve (12) months specifically designated by the District, who work on an emergency closure day **and are required by their supervisor to work on-site** shall be compensated at one and one-half (1½) times their regular hourly rate of pay for the first three (3) days of emergency closure per fiscal year.

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- d. On emergency closure days, employees working fewer than twelve (12) months shall not report to work, except as provided for in Sections 3 and 5. All employees working fewer than twelve (12) months shall make up at least the first three (3) days of emergency closure at their regular rate of pay per fiscal year.
- e. Should additional employees be needed during emergency closure days, less than twelve (12) month employees may be called in to work **on-site but are not required to do so. be called in to work on a voluntary basis.** Such employees shall be compensated at one and one-half (1½) times their regular hourly rate of pay **for up to three (3) days of emergency closure per fiscal year.** In addition, such employees shall be expected to report to work on makeup days.
- f. Should employees report to work, and an emergency closure occurs, the District agrees to compensate those employees a minimum of two (2) hours at the employee's regular rate of pay. An employee will not be paid if the District gave reasonable notice of the emergency closure by radio, television, telephone, or electronically beforehand.
- g. Should it become necessary to maintain emergency closure status in the District after three (3) days of emergency closure in a fiscal year, the Superintendent shall meet with the Association and other district stakeholders as deemed necessary to develop an appropriate response plan to address staffing needs and compensation.

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ARTICLE TBD - SAFETY

The District will follow applicable state and federal law regarding staff safety, including but not limited to: injury or harassment, access to behavioral plans, and/or safety training.

If an employee is aware of unsafe or unhealthy working conditions, the employee shall report such conditions in writing to the supervisor and District Safety Committee. (See Article 16 - Standing Committees).

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ARTICLE TBD - NONDISCRIMINATION & HARASSMENT/BULLYING

**Removed from Article 6 Section E*

The District agrees that employees shall not be discriminated against by reason of race, color, creed, sex, sexual preference, national origin, political or religious affiliations, physical handicap, or activities associated with the employee's union.

The District agrees that employees who identify as members of a protected class shall not be discriminated against. Bargaining unit members who believe they are targets of discrimination, hazing, harassment, intimidation, menacing, bullying, or cyberbullying may be accompanied by a union representative when reporting to and engaging with the District in filing a report and addressing the issue through the District process for investigating and addressing discrimination concerns. Retaliation against any person who reports, is thought to have reported, files a complaint or otherwise participates in an investigation or inquiry is strictly prohibited by Board policy.

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ARTICLE 7 - OVERTIME, COMPENSATORY TIME, CALL-BACK TIME, ~~EXTRA DUTY COMPENSATION~~

A. Overtime

1. Bargaining unit employees shall be compensated at the rate of time and one-half (1½) in the form of pay or compensatory time off ~~at the discretion of the District~~ for overtime work in excess of eight (8) hours per day or forty (40) hours in any designated workweek. For the purpose of computing overtime, all time for which an employee is compensated, including paid leave, shall be credited as time worked.
 - a. **Classified staff who work twelve (12) months may be eligible to work four ten-hour (4/10) shifts when school is not in session. Each department supervisor will determine, based on workload and scheduling, whether the four ten-hour (4/10) work schedule will work for their department. All leave and holidays will be paid as eight (8) hours. Employees will coordinate with their supervisor to either take two (2) hours of paid leave or flex their schedule that work week to make up the time lost (these 2 hours are not eligible for overtime pay).**
2. Overtime shall be computed to the nearest quarter (.25) hour. Overtime pay shall be based on the actual number of hours on duty, except in the case of call back time.
3. **Overtime shall be assigned to a qualified staff on a voluntary basis, by a rotation system whenever possible. In the event that sufficient acceptable personnel do not voluntarily accept overtime, such additional personnel, as are deemed necessary by the District, shall be required to work overtime.**
4. Overtime is to be approved by the supervisor in advance. In the event of an emergency, approval may be given after the fact.

B. Compensatory Time

1. Compensatory time off must be taken within the work year in which it is earned. If the District is unable to schedule such compensatory time off **by June 30th of each year within this period**, the employee shall be paid ~~upon request~~ in the employee's regular pay period. When comp time is earned as overtime, it will be compensated at the rate of time and one-half (1½).
2. Accrual and use of compensatory time are to be approved by the supervisor in advance. In the event of an emergency, approval to accrue compensatory time may be given after the fact. **A compensatory time log shall be maintained by the supervisor to record time accrued and taken by the employee.**
3. Employees must be permitted to use accrued compensatory time within a reasonable period after requesting time off, unless it would unduly disrupt the operations of the District.
4. ~~If employees have not been able to use their accrued compensatory time by June 30 of each year, they will have that time paid by the District in their last payroll check of the fiscal year, unless prior arrangements have been made to accrue the time.~~

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1. An employee may accrue up to a maximum of forty (40) hours compensatory time.

C. Call-Back Time

When a bargaining unit employee is called back to work, a minimum of two (2) hours paid time will be guaranteed.

~~D. Extra Duty Assignments Compensation~~ **moved to new article*

1. ~~The parties agree that the following conditions will be applied to the hiring and paying of bargaining unit employees who work at athletic and/or other extra-curricular functions. Examples of assignments include but are not limited to ticket takers, gatekeepers, scorekeepers, running game clocks, student supervision, security, dance chaperones, etc.~~
 - a. ~~Classified employees do not qualify for overtime pay when working such assignments as described above because these assignments are considered occasional or sporadic, and are in a different capacity, as defined by the Fair Labor Standards Act.~~
 - b. ~~Classified employees hired for extra duty assignments as described above shall be paid an hourly rate at least equivalent to Oregon's minimum wage of thirteen dollars (\$13.00). In no case will classified employees be paid less than other employees for these same duties.~~
2. ~~Extra Duty coaching assignments will be offered to licensed employees first, and then to classified employees under the following conditions:~~
 - a. ~~Coaching assignments should not regularly interfere with an employee's regular work duties.~~
 - b. ~~Coaching assignments are routine in nature and are, therefore, subject to overtime which is defined as work in excess of forty (40) hours in any designated workweek, including holiday time.~~
 - c. ~~The rate of pay for Extra Duty coaching assignments shall be at the discretion of the District, based on applicable wage and hour laws.~~

Key: **New Language** **Removed Language** **Housekeeping**

ARTICLE TBD - EXTRA DUTY ASSIGNMENTS

1. Classified employees will have equal consideration for District Extra Duty assignments as other Ashland School District employees.
2. The base compensation for Extra Duty assignments will be equivalent to that established in the Ashland Education Association Appendix: Extra Duty Assignments. The hourly compensation shall be no less than Oregon's minimum wage.
3. Extra Duty assignments will be completed outside of the employees normal work schedule. Should work on the extra duty assignment need to be completed during the employee's normal work hours, the employee will clock out of ~~from~~ their classified position and clock back in once the extra duty work has been completed.
4. Staff who must clock out of their regularly scheduled assignment to complete their extra duty assignment, may request flex time from their supervisor to make up any missed hours. Flex time must be pre-approved and completed the same work week. The District recognizes that employee participation in extra duty assignments benefits the community and district and will make efforts to accommodate flex time requests. Should flex time not be available, the employee shall have the option of using personal leave, vacation leave, compensatory time, or unpaid leave.
5. Unpaid leave used while on an extra duty assignment would not be included in the number of unpaid days used to calculate benefit status.

Key: **New Language** **Removed Language** **Housekeeping**

ARTICLE 8 - LAYOFF AND RE-EMPLOYMENT

A. Pending Layoff Action

The District will notify the Association in writing, thirty (30) working days prior to pending layoff actions that will affect employees within the bargaining unit. The Association's representatives and District representatives will meet during the thirty (30) working day period to discuss alternatives to the layoff of employees in the bargaining unit. The purpose of such consultation shall be for the Association to offer alternative solutions and/or ensure the proper contractual implementation of such reductions. In unusual circumstances, both parties may mutually agree to waive the thirty (30) day waiting period.

B. Layoffs

1. Whenever the District determines a need exists to reduce District staffing, the District may lay off bargaining unit employees based on seniority.
2. Layoffs shall be made in reverse order of seniority. The date of hire will determine seniority. EXAMPLE: The least senior employee in a classification shall be laid off first.
3. Seniority shall be defined as the length of continuous classified service, inclusive of approved leaves, within the District since the last date of hire. In the event that the seniority is the same, determination shall be by lot at the beginning of employment.
4. No permanent bargaining unit employees shall be laid off within a job classification until all retirees (1039), probationary, substitute, and temporary employees in such classification have been released.

C. Re-Employment

No new permanent bargaining unit employees will be hired into classifications from which employees are laid off. Bargaining unit employees on the Layoff Re-Employment List will be offered available temporary positions. Refusal of such offer will not constitute removal from the Layoff Re-Employment List.

D. Layoff Rules

1. If the District determines the need for reduction in its **workforce**, a written notice of not less than thirty (30) calendar days prior to the last day of work shall be provided to the Association and to the bargaining unit employees to be laid off. In unusual circumstances, both parties may mutually agree to waive the thirty (30) day waiting period.
2. The notice shall contain the effective date of layoff, displacement rights, if any, and re-employment rights. Bargaining unit employees who have been laid off shall be placed on a re-employment list for a period of twenty-seven (27) months.

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3. Offers of re-employment shall be made in reverse order of layoff as openings occur for which employees meet qualifications within their former classifications.
4. Bargaining unit employees scheduled for layoff may bump into any equal or lower classification in which they held permanent status provided they are more senior than the employee being bumped and are qualified to perform the current duties/responsibilities of the equal or lower classification as required. Example: Employee A has two (2) years seniority as a Secretary II and is laid off from the classification. That employee previously held permanent status as a Secretary 1 and was in the classification for five (5) years. Employee A bumps into a Secretary 1 classification. The employee's DISTRICT seniority as a Secretary 1 would be seven (7) years. Such combining would continue each time an employee is bumped into an additional equal or lower classification for which the employee is eligible.
5. Individuals on a Layoff Re-Employment list shall be notified in writing, sent by certified mail, return receipt requested, of an offer of re-employment and will have ten (10) working days to respond.
6. Failure to respond within the time specified or a refusal of comparable employment would cause the individual's name to be permanently removed from the re-employment list. Comparable employment shall be equal to 100% of the compensation level (including benefits) of the previous assignment prior to layoff.
7. An employee who is laid off and subsequently re-employed shall retain the seniority earned prior to the effective date of the layoff.
8. The District reserves the right to retain less senior employees where there are operational needs for special skills. Special skills will be mutually agreed upon by the District and the Association, on a case by case basis, at the time the operational need is identified.

E. Reduction of Hours

1. Whenever the District determines a need exists to reduce hours of work by more than one (1) hour, which will affect bargaining unit employees, the District agrees to notify the Association, in writing, of such pending actions. The District will consult with the Association for a maximum of thirty (30) working days. The purpose of such consultation shall be for the Association to offer alternative solutions and/or ensure the proper contractual implementation of such reductions. In unusual circumstances, both parties may mutually agree to waive the thirty (30) day consultation period.
2. After consultation with the Association, the District may implement a reduction in hours. In that event, affected bargaining unit employees will first be ranked in order of seniority. In order of seniority, and to the greatest extent possible, the District shall accommodate the preferences of any employee who may be transferred or reassigned in connection with a reduction in hours. Those preferences will be supplied to the District by means of a form mutually developed by the District and the Association to be completed by the affected employees. If the employee's

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preferences cannot be met, the District may implement an involuntary transfer for that employee.

The Association shall be entitled to have a designated representative at any meetings held regarding the implementation of reduction in hours. Such meetings shall be scheduled in a timely fashion at a mutually agreed upon time.

3. Bargaining unit employees who have had their hours reduced by more than one (1) hour shall be placed on the Reduction In Hours Re-Employment List for a period of twenty-seven (27) months. When the District determines that increased hours become available, bargaining unit employees shall be offered by seniority, the opportunity to regain the hours that have been previously reduced, provided that the new assignment does not interfere with their current duties.

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ARTICLE 9 - PERSONNEL AND WORKING FILES RECORDS

The official personnel **file record** for every classified employee is maintained at the District Office. The personnel file shall contain records relevant to the employee's employment and shall be the sole repository of such materials. Working files may be maintained at the work location but are not considered to be an official record.

A. Personnel Files

The personnel **files records** of any employee in the bargaining unit shall not have any information of a critical nature that does not bear the employee's signature or initials indicating that the employee has been shown the material or a statement by that supervisor that the employee has been shown the material and refused to sign or initial such information. The employee has the right to attach a statement to any information the employee considers to be incorrect or derogatory. Information not in compliance with this section shall not be used in any proceedings adverse to the employee. **An employee may request permission to view the employee's personnel file upon notice to the Superintendent or the Director of Human Resources. At no time shall the employee remove material from the employee's file. An employee may provide the Association with permission to access the employee's personnel file. Upon request, materials in personnel files may be removed after they have been in the file for three (3) years at superintendent discretion or as required in Oregon statute.**

~~B. An employee may request permission to view the employee's personnel file upon notice to the Superintendent or the Director of Human Resources. An employee may provide the Association with permission to access the employee's personnel file. At no time shall the employee remove material from the employee's file. The employee may request that certain documents be removed from the employee's file and destroyed. Said documents will be reviewed by the Superintendent or designated representative and if, in the opinion of the District, such material is irrelevant to the employment and the work of the employee, such documents will be withdrawn from the file and destroyed.~~

B. Working Files

Supervisor's working files shall be confidential. Members will be made aware of verbal notices and/or letters of direction placed in the supervisor's working file at the time they are placed in the working file. Members may review the contents of their working file upon request. Materials generated and placed in the working file will be properly dated. Upon request, materials in working files shall be removed after they have been in the file for three (3) years or as required in Oregon statute.

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ARTICLE 10 - GRIEVANCE PROCEDURE

A. Purpose

The purpose of this procedure is to secure, at the lowest possible administrative level, a resolution to the grievance caused from the interpretation or application of this Agreement. The proceedings will be kept confidential and as informal as appropriate at any level of the procedure.

B. Definitions

1. Grievance: A claim by an employee, a group of employees or classification, or the Association, that names at least one or more employees, that there has been a violation, misinterpretation, or misapplication of this Agreement.
2. Grievant: An employee, group of employees or classification, or the Association.
3. Days: Regular District business days.
4. Representative: One who may speak for and/or advise the grievant.
5. Immediate supervisor: One who has direct administrative or supervisory responsibilities over the grievant.
6. Worksite Level: A grievance that originates at the worksite or department level.
7. District Level: A grievance that does not originate at the worksite or department level.

C. Grievance Guidelines

1. The grievant must be present or represented at all steps of the procedure. The grievant may be represented by a person or persons of their choice at any step of the grievance procedure. Should the grievant choose to represent oneself, the following requirements shall apply:
 - a. Any employee covered by this Agreement may file a grievance directly and have such grievance adjusted without intervention by the Association, as long as the adjustment is made prior to arbitration and is not inconsistent with the terms of this Agreement. The employee may provide to the Association any copies of the grievance form and any responses by the District, with all accompanying documentation.
 - b. Prior to any grievance adjustment, the Association shall be provided with a copy of the proposed resolution for review and be given five (5) **working** days to respond.
 - c. The Association shall be given the opportunity to be present at the adjustment, pursuant to ORS 663.015.

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- d. The Association has the sole authority to appeal a grievance to arbitration.
2. The number of days indicated at each level shall be considered maximum.
3. The time limits may be extended by mutual consent in writing by the parties involved at any level.
4. A grievance shall be considered resolved at any level when the grievant fails to request further consideration of the grievant's grievance at the next level within the time limits specified in these procedures. Failure at any level of this procedure to communicate the decision of a grievance in writing within the specified time limits shall permit the grievant to proceed to the next level.
5. Each grievance shall be initiated within ten (10) working days after the occurrence of the cause of the complaint. However, if the grievant did not become aware of the occurrence until a later date, the grievant must then initiate action within ten (10) working days following the grievant's grievant's first knowledge of the cause. **Timelines may be extended by mutual agreement.** In failing to thus initiate action, **they he/she** shall be considered to have abandoned the grievance.

D. Levels of Grievance Procedure (See chart in Appendix B)

1. Level 1 – Informal

Any grievance arising out of the interpretation of the terms of this Agreement shall first be discussed informally with the objective of solving the matter at the lowest possible level. In the case of a grievance that originates at the worksite level, the grievant shall meet with the immediate supervisor. In the case of a grievance that originates at the District level, the grievant shall meet with the Director of Human Resources. This informal level meeting shall occur within ten (10) working days of the **grievance submission grievant's knowledge of the violation**. The grievant may be accompanied by an Association representative at this meeting. The grievant shall specify the relief or remedy sought at this level. The immediate supervisor or Director of Human Resources shall communicate the decision within ten (10) working days to the grievant with a copy to the Association. The Association shall be allowed to exhaust informal discussions before the filing of any formal grievance without affecting grievance timelines.

2. Level 2 - Formal

If the grievant is not satisfied with the disposition of the grievant's grievance at Level 1, the grievant may file a written grievance with the immediate supervisor (worksite level) and/or the Director of Human Resources (District level) within ten (10) working days following the decision at Level 1. This grievance shall be in writing and shall set forth the grounds upon which the grievance is based, the contract clauses involved, the remedy requested, and the reason the remedy at Level 1 was unacceptable. **Grievance form in Appendix *TBA* may be used.** The Level 2 Formal Grievance meeting shall take place within ten (10) working days from the date the supervisor or Director of Human Resources receives the grievance. The supervisor may attend the meeting regardless of whether the appeal was filed with the

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supervisor. The immediate supervisor or the Director of Human Resources shall communicate in writing their decision in writing within ten (10) working days following the grievance meeting to the grievant, with a copy to the Association.

3. Level 3

If the grievant is not satisfied with the disposition of the grievance at Level 2, the grievant may appeal the decision to the Superintendent or the designee within ten (10) working days of receipt of the decision rendered at Level 2. This grievance shall be in writing and shall set forth the grounds upon which the grievance is based, the contract clauses involved, the remedy requested, and the reason the remedy at Level 2 was unacceptable. The Level 3 grievance meeting shall take place within ten (10) working days from the date the Superintendent or designee receives the written grievance appeal. The Superintendent or designee shall communicate in writing within ten (10) working days of the receipt of the Level 3 meeting. The Superintendent or designee at their option may schedule a hearing on the matter. If so, written notice of the time and place of the hearing shall be provided to the grievant and the Association at least ten (10) working days prior to the hearing. Attendance at the appeal hearing shall be restricted to the grievant, designated representatives and relevant witnesses, **unless a request by the grievant for additional parties is granted by the hearing officer.** Within ten (10) working days of the hearing or review, the Superintendent shall communicate to the grievant and the Association the written decision which shall include supporting reasons, therefore.

4. Level 4

If the grievant is not satisfied with the disposition **of the grievant's grievance** at Level 3, the grievant may appeal the decision to the School Board within ten (10) working days of receipt of the decision rendered at Level 3 **or skip Level 4 and proceed to Level 5.** The School Board shall schedule a grievance hearing at their next scheduled meeting. Written notice of the time and place of the hearing shall be provided to the grievant and the Association at least ten (10) working days prior to the hearing. Attendance at the appeal hearing shall be restricted to the grievant, the grievant's designated representatives and relevant witnesses, **unless a request by the grievant for additional parties is granted by the hearing officer.** Within **ten (10) fifteen (15)** working days of the hearing, the School Board shall communicate to the grievant and the Association their written decision which shall include supporting reasons, therefore.

5. Level 5

- a. If the grievant is not satisfied with the School Board's decision **and has skipped Level 4,** the Association may appeal the decision to arbitration within ten (10) working days.

If the grievant is not satisfied with the School Board's decision, the Association may appeal the decision to arbitration within ten (10) working days.

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- b. Within ten (10) working days of filing the appeal, the Association shall request from the Employment Relations Board a list of five arbitrators. The selection of the arbitrator shall be in accordance with ERB procedures.
- c. The parties and the arbitrator shall follow the rules provided by the American Arbitration Association.
- d. The decision of the arbitrator shall be rendered within thirty (30) days and be binding on all parties involved.
- e. Any costs of arbitration shall be shared equally by the Association and the District.

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ARTICLE 11 - COMPENSATION

A. Effective July 1, 2021 2024, each cell of the 2020-21 2023-24 classified salary schedule for the specified classifications shall be increased by the dollar amount specified in the chart below. After the targeted dollar amount is applied, each cell of the 2023-24 classified salary schedule shall be increased by 2.25% four (4.00%) for all classifications other than the specified groups below, which shall be increased by \$1 or \$1.25, as indicated in the chart.

Eligible employees shall receive a one-step advancement on the classified salary schedule on July 1 each year during the term of this Agreement.

Positions receiving \$1.25 increase	Positions receiving \$1.00 increase
Education Assistant	Youth Advocate
EA – Media Asst	Crossing Guard
EA - SPED I	Bus - Wait and Training Time
EA - SPED II	Asst Head Custodian – AMS & AHS
EA – Site Based	Head Custodian (K-12)
	Lead Custodian
	Food Service
	Cafeteria Manager
	Maintenance I
	Maintenance II
	Maintenance III
	Maintenance - HVAC
	Maintenance – Electrician
	Office Mgr – Elementary & Athletics

2024-25 Targeted Raises	
Classification	Targeted Raises
Custodian	\$1.00
Assistant Head Custodian - AMS & AHS	\$1.00
Head Custodian - Elementary & AMS	\$1.00
Head Custodian - AHS	\$1.00
Lead Custodian	\$1.00
Food Service Worker	\$1.00

The following classifications will be removed from the salary schedule: Bus - Wait and Training, Bus Driver - Standby, Bus Driver - Maintenance Rate, Bus Driver - Relief, Custodian - Bus, Library Manager, Computer Lab Coordinator, and Network Technician.

Effective July 1, 2022, each cell of the 2021-22 classified salary schedule shall be increased by 2.5% and all eligible employees shall receive normal step advancement.

Effective July 1, 2023, each cell of the 2022-23 classified salary schedule shall be increased by 2.5% and all eligible employees shall receive normal step advancement.

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B. Funding

The parties recognize that revenue needed to fund the compensation provided by this Agreement must be approved by established budget procedures, adequate sources of revenue and, in certain circumstances, by a vote of the citizens.

The parties recognize that revenue needed to fund the compensation provided by this Agreement is contingent upon the state funding and distribution formula, plus other District revenues as allowed and provided for by law. The District agrees to budget annually the full amount necessary to fund this Agreement. In the event the District, through no fault of its own, is unable to meet the financial obligations set forth herein during the life of this Agreement, the parties may re-open this Agreement to negotiate wages and/or hours. It would be the goal of these negotiations to find creative solutions to revenue shortfalls prior to reducing wages or laying-off any bargaining unit members. If the District should receive significantly increased funds, the District shall bargain with the Association in prioritizing the funds. "Significant increase" shall be defined as any unanticipated general fund **State School Fund formula** revenue received by the District in excess of **8% 10% of total general fund resources of the fiscal year then in session**

C. Longevity

For the 2021-22 school year, employees who have completed eight (8) years of continuous service within the District become eligible for longevity pay. Longevity pay will be included in the employee's hourly wage rate and computed in the following manner: A schedule will be created for all employees eligible for longevity and on step 8. Year one will be calculated using the following formula: years of service beyond seven x .0076 = increase times hourly rate. Each additional year will be increased by .74%. See schedule in Appendix D-1.

The anniversary date of longevity pay will be July 1 of each year with credit being granted for service performed prior to January 1 of the previous school year.

Employees that qualify for longevity pay and are employed in December also receive a \$100 bonus in their December paycheck.

Effective July 1, 2022 the following longevity pay formula shall apply:

1. Employees Receiving Longevity Pay for the First Time on or After July 1, 2022

Employees who have completed eight (8) years of continuous service within the District become eligible for longevity pay. Annual longevity pay will be paid according to the table below, starting at the beginning of Year 9:

Years of Svc	12 Month		11 Month		10 Month	
	6+ Hrs	4+ Hrs	6+ Hrs	4+ Hrs	6+ Hrs	4+ Hrs
Years 9-13	1000	500	917	458	833	417
Years 14-19	2400	1200	2,200	1,100	2,000	1,000
Years 20-25	4000	2000	3,667	1,833	3,333	1,667
Years 26+	5000	2500	4,583	2,292	4,167	2,083

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The annual longevity pay provided in the table above shall be included in the employee's hourly rate of pay and calculated by dividing the employee's annual longevity pay provided in the table by the employee's annual hours of work and added to the hourly rate of step 8. An example is shown below for calculating an employee's rate of pay with longevity:

(Hourly base Wage at Step 8 + COLA) + hourly longevity pay = Employee's Hourly Rate.

The Employee's Hourly Rate of Pay, as calculated above, shall be used for calculating overtime pay, paid leaves, and other calculations requiring the employee's hourly rate of pay.

An employee's longevity pay shall increase or decrease based on the employee's movement in the table above.

2. Employees Who Received Longevity Pay Prior to July 1, 2022

a. Memorialized Longevity Pay Becomes Part of the Employee's Regular Hourly Wage

Employees who received longevity pay prior to July 1, 2022, using the formula provided in the 2015-2018 CBA, shall retain any longevity pay earned up until July 1, 2022. That longevity pay shall be established as an annual amount referred to as the "Memorialized Longevity Pay." The Memorialized Longevity Pay shall be included in the employee's regular hourly rate of pay through the end of employment.

Effective July 1, 2022, employees with Memorialized Longevity Pay shall be placed on the personalized Memorialized Longevity Pay Scale found in Appendix D-2 & D-3. The Memorialized Longevity Pay Scale reflects the employee's Memorialized Longevity Pay as an annual amount and as an hourly amount that is included in the employee's regular hourly rate of pay.

An employee on the Memorialized Longevity Pay scale who moves positions, changes work schedules, or has an increase/decrease in hours of work, shall not suffer a loss in their annual Memorialized Longevity Pay or a decrease in the hourly rate of pay in Appendix D-2 & D-3.

COLA's shall be applied to the hourly rate of pay on the Memorialized Longevity Pay Scale.

b. Employees with Memorialized Longevity Pay Only Receive Additional Longevity Pay When the Annualized Amount of Longevity Pay in the Table Above Exceeds Their Memorialized Longevity Pay.

Effective July 1, 2022, employees with Memorialized Longevity Pay shall only receive additional longevity pay when the annualized longevity pay provided in the table above exceeds their annual Memorialized Longevity Pay in Appendix D-2 & D-3.

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The employee's annual Memorialized Longevity Pay will be deducted from the annualized longevity pay provided in the table above and the remaining balance will represent the increase in the employee's annual longevity pay. The increase shall be added to the employee's hourly rate of pay and calculated by dividing the increase in longevity pay by the employee's annual work hours. The additional longevity pay will be added to the employee's hourly rate after any applicable COLA.

If the employee's Memorialized Longevity Pay is more than the amount in the above table, there will be no increase in longevity pay until the

employee advances to a tier in the above table where the annualized longevity pay in the table exceeds their Memorialized Longevity Pay.

Employees who do not receive longevity increases shall continue to receive COLAs applied to their hourly rate of pay in Appendix D-2 & D-3.

Demonstrative Example A:

Employee A is a 12-month, 8-hour employee with 11 years of service and an annual Memorialized Longevity Pay amount of \$1200. The annual longevity amount in the table above is \$1,000. Because that is less than Employee A's Memorialized Longevity Pay, Employee A does not receive any additional longevity pay until Employee A starts Year 14 of service. At the start of Year 14, the annual amount in the longevity table increases to \$2400. As a result, Employee A will receive an increase that is equal to the difference between the amount in the table and their Memorialized Longevity Pay:

$$\$2,400 - \$1,200 = \$1,200.$$

Employee A will receive an additional \$1,200 in annual longevity pay that is calculated as an addition to Employee A's hourly rate of pay. Assuming Employee A works 2,088 hours annually, then Employee A's rate of pay increases accordingly:

$\$1,200 \div 2,088 \text{ hours} = \0.57 per hour . This amount will be added to Employee A's hourly rate of pay provided in the Memorialized Longevity Pay Scale in Appendix D-2 & D-3.

Demonstrative Example B:

Employee B is an 11-month, 4.5-hour employee with 22 years of experience and an annual Memorialized Longevity amount of \$1700. The annual longevity amount in the table above is \$1833. Because this is more than Employee B's Memorialized Longevity Pay, Employee B will receive additional longevity pay that is equal to the difference between the two:

$$\$1833 - \$1700 = \$133.$$

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Employee B will receive an additional \$133 in longevity pay that is calculated as an addition to Employee B's hourly rate of pay. Assuming Employee B works 935 hours annually, then Employee B's rate of pay increases accordingly:

$\$133 \div 935 \text{ hours} = \0.14 per hour . This amount will be added to Employee B's hourly rate of pay provided in the Memorialized Longevity Pay Scale in Appendix D-2 & D-3.

3. Employees with 25 years of Service Retain Longevity Under Former Longevity System

The following employees with 25 years of service with the District shall retain and continue to receive longevity pay using the longevity formula provided in the 2015 – 2018 CBA, and outlined below, through June 30, 2025:

Longevity pay will be included in the employee's hourly wage rate and computed in the following manner: A schedule will be created for all employees eligible for longevity and on step 8. Year one will be calculated using the following formula: years of service beyond seven x .0076 = increase times hourly rate. Each additional year will be increased by .74%. See schedule in Appendix D-4.

- Terri Baker
- Abdi Guled
- Terry Myers
- Brad Cummings
- Sean Shawn Grimesey
- Donnie Albert
- Nancy Steele

After June 30, 2025, the employees listed above will not receive any additional longevity pay but shall retain the longevity pay they have earned using the calculation provided above.

These employees shall continue to receive COLAs applied to their hourly rate of pay, inclusive of longevity pay.

D. Public Employees Retirement System

The District shall assume and pay a 6% average monthly employee contribution to the Public Employees Retirement Fund for the bargaining unit members participating in P.E.R.S. Such district contributions to P.E.R.S. shall continue for the term of this Agreement.

E. Transportation Rate of Pay

All wait time, training time, standby time, and drive time will be compensated at the driver's hourly rate. Exception: For overnight trips, eight (8) hours will be deducted for sleeping time.

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F. Transportation Pre-Trip and Post-Trip

Pre-trip: Bus drivers shall receive twenty (20) paid minutes for the pre-trip bus inspection.

Post-trip: Bus drivers shall receive an additional twenty (20) paid minutes for the post-shift clean up and lock up process.

G. Route Gaps

If there is one (1) hour or less between the employee's route runs or assignment(s), the driver shall be compensated **at their normal wage**, as follows:

1. ~~Route(s) will be compensated at their normal wage rate.~~

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ARTICLE 12 - HOLIDAYS

A. **12-Month Bargaining Unit Employees**

Twelve-month bargaining unit employees will receive the following twelve (12) paid holidays per year:

- INDEPENDENCE DAY
- LABOR DAY
- INDIGENOUS PEOPLE'S DAY
- VETERANS DAY
- THANKSGIVING DAY
- DAY AFTER THANKSGIVING
- Day prior to or following CHRISTMAS (at district's discretion)
- CHRISTMAS DAY
- NEW YEARS DAY
- DR. MARTIN LUTHER KING, JR. DAY
- PRESIDENTS DAY
- MEMORIAL DAY
- **JUNETEENTH**

B. **9-Month Bargaining Unit Employees**

All bargaining unit employees with a work calendar of nine (9) full months or more, September through June, but less than twelve (12) full months, on a regular basis, will receive paid holidays prorated according to the time worked. The following holidays shall apply if they fall within the employee's scheduled work periods:

- LABOR DAY
- INDIGENOUS PEOPLE'S DAY
- VETERANS DAY
- THANKSGIVING DAY
- DAY AFTER THANKSGIVING
- Day prior to or following CHRISTMAS (at district's discretion)
- CHRISTMAS DAY
- NEW YEARS DAY
- DR. MARTIN LUTHER KING, JR. DAY
- PRESIDENTS DAY
- MEMORIAL DAY
- **JUNETEENTH**

- C. In order to be eligible for paid holidays, the employee must have worked the last scheduled workday before and the first scheduled workday after the holiday or have been on authorized leave with pay.
- D. An employee who is assigned to work on a holiday will be paid one and one-half (1½) times the employee's regular rate of pay in addition to the employee's regular holiday pay. The District shall guarantee a minimum of two (2) hours at time and one-half pay.

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ARTICLE 13 - LEAVES

Leaves in this Article shall be available to all bargaining unit employees unless otherwise identified in the Article. All leave requests shall be approved or denied within two (2) weeks of submission if possible. If there is no response by the employee's supervisor after two (2) weeks, the leave will be considered approved.

Supervisors will be responsible for scheduling leaves and will facilitate communication with employees to maintain consistency and to ensure clear understanding of scheduling procedures and options available to employees.

A. Vacation

Bargaining unit employees who work on a twelve (12)-month calendar will be eligible to receive paid vacation. Bargaining unit employees who work less than twelve (12) months per year (i.e., 10 months) do not earn paid vacation.

The District will consider the preference of the employee in the scheduling of vacation leave.

Vacation Accrual

Paid vacation leave shall accrue on the following basis for full-time employees who work a twelve (12)-month calendar:

Service Time	Annual Accrual	Maximum Accrual
1st year of Employment	8 days (64 hours)	8 days (64 hours)
1 - 8 years	12 days (96 hours)	19 days (152 hours)
9-15 years	15 days (120 hours)	24 days (192 hours)
16 years & over	20 days (160 Hours)	32 days (256 Hours)

Service Time	Annual Accrual	Maximum Accrual
Less than 1 year	8 days (64 hours)	8 days (64 hours)
1 - 5 years	10 days (80 hours)	16 days (128 hours)
6 - 10 years	12 days (96 hours)	19 days (152 hours)
11-15 years	15 days (120 hours)	24 days (192 hours)
16-20 years	17 days (136 hours)	27 days (216 hours)
21 years & over	20 days (160 Hours)	32 days (256 Hours)

1. Employees working a twelve (12)-month calendar who work less than eight (8) hours per day will accrue vacation leave in direct proportion to full-time equivalency. A "day" equals their daily contracted work hours.
2. Vacation leave will be **front-loaded on** accrue on a monthly basis using July 1st as the annual accrual date. The District will front load five (5) days of vacation on July 1 for staff who have been employed for at least one year and have less than five (5) accrued vacation days on May 15.

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3. Vacation leave shall not exceed the maximum accrual at the end of **each fiscal year** **any pay period**. Once an employee has reached the maximum accrual the employee will not accrue additional vacation until the balance falls below the maximum.

Employees are encouraged to proactively schedule vacation with their supervisors in order to avoid this occurrence. A new employee must successfully complete the employee's six (6)-month probationary period before the employee may use accrued vacation leave. At the completion of the probationary period, the employee will be credited with vacation accrual.

4. Employees are encouraged to take their vacation in full week or full day increments but may use accrued vacation in one-hour increments.
5. Vacation leave shall accrue during any paid leave of absence.
6. Upon termination of employment, an employee shall be paid for accrued unused vacation, providing the six (6)-month probationary period is completed.

Vacation Selection

Schedules for vacations shall be coordinated and approved by the supervisor, based on efficient operation of the District. Supervisors will encourage employees to utilize accrued vacation in order to maintain a positive and healthy workforce.

When two or more employees simultaneously request the same vacation dates, the request from the employee with the highest seniority will be considered first.

When vacation has been approved for an employee and an employee with higher seniority subsequently applies for the same vacation dates, the request of the employee with higher seniority shall not supersede the first employee's request. **In this circumstance, vacation** **Vacation** requests that have been denied by the supervisor may be appealed to the Director of Human Resources and are not subject to the grievance procedure.

B. Sick Leave

Sick leave or absence with pay due to illness or injury shall be granted to school employees to protect the health and welfare of both employees and students. Employees are encouraged to use their sick leave when they are ill to enable them to regain and remain in good health.

When possible, employees should notify supervisors of prearranged medical procedures at least five (5) working days in advance.

Sick Leave Accrual

Bargaining unit employees will accrue sick leave at the rate of one day for each full calendar month of service completed. Ten (10)-month employees will be eligible for ten (10) days of accrual annually. There is no maximum accrual for sick leave. It will remain available to the employee while the employee is employed by the District.

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1. Unused sick leave shall not be compensated for in any way at the time of termination of employment except as stated in Article 15 of this Agreement; Supplemental Retirement.
2. An employee may utilize unused sick leave accrual upon retirement in accordance with benefits provided by PERS and appropriate legislation.
3. A new employee may elect to transfer unused sick leave from a former Oregon district in accordance with ORS 332.507(4).

Sick Leave Utilization

Bargaining unit employees may use sick leave for reasons allowed pursuant to ORS 653.616, including ~~Bargaining unit employees may utilize their allowance of sick leave;~~

1. ~~For an employee's mental or physical illness, injury or health condition; need for medical diagnosis, care or treatment of a mental or physical illness, injury or health condition; or need for preventive medical care.~~

~~When unable to perform work duties by reason of illness or injury;~~

~~For necessary personal medical, dental care, or vision care;~~

2. ~~For care of a family member or child with a mental or physical illness, injury or health condition; care of a family member who needs medical diagnosis, care, or treatment of a mental or physical illness, injury or health condition; or care of a family member who needs preventive medical care.~~

~~For serious illness in the immediate family;~~

3. Exposure to contagious disease under circumstances by which the health of students, fellow employees or the public would be potentially affected by attendance of the employee; and
4. Under the Federal and State Medical Leave Acts (FMLA and OFLA).

Employees may use sick leave in minimum fifteen (15)-minute increments.

Sick leave for duration of more than five (5) consecutive work days may require a certificate from the employee's attending physician or health practitioner that the employee is able to return to work; ~~or that the illness or injury prevents the school employee from working.~~

Sick leave for duration of more than five (5) work days within any 30 day period may require a certificate from the employee's attending physician or health practitioner that the illness or injury prevents the school employee from working

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New employees in probationary status will be permitted to use accrued sick leave during their probationary period.

Immediate Family

Immediate family is defined as any member of the employee's, spouses, or domestic partner's parents, children, stepchildren, grandchildren, brothers, sisters, stepbrothers, stepsisters, grandparents, and loco-in-parentis relationships.

A family member is any of the following: Your spouse or domestic partner. Your child (biological, adopted, stepchild, or foster child), your spouse or domestic partner's child, or the child's spouse or domestic partner.

1. A spouse or domestic partner;
2. A child of a covered individual or the child's spouse or domestic partner;
3. A parent of a covered individual or the parent's spouse or domestic partner;
4. A sibling or stepsibling of a covered individual or the sibling's or stepsibling's spouse or domestic partner;
5. A grandparent of a covered individual or the grandparent's spouse or domestic partner;
6. A grandchild of a covered individual or the grandchild's spouse or domestic partner;
7. Any individual related by blood or affinity whose close association with a covered individual is the equivalent of a family relationship.

Leave Without Pay/Layoff

Sick leave shall not accrue during any period of leave of absence without pay or layoff; however, the returning employee shall have the previously accrued sick leave restored upon return to employment from such approved period of leave.

C. **District** Paid Family Sick Leave

Bargaining unit employees shall receive up to three (3) days leave per year with pay for the illness of an immediate family member. Paid Family Sick Leave will accrue on July 1st each year and will expire on June 30th.

Employees in a probationary status will not be permitted to use Paid Family Sick Leave until they have successfully completed the six (6) month probationary period. Accrued paid family sick leave will be credited to the employee upon successful completion of the probationary period.

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D. Unpaid Family Sick Leave

Unpaid Family Sick Leave shall be granted in accordance with the Family Medical Leave Act (FMLA) and Oregon Family Leave Act (OFLA).

E. Personal leave

Bargaining unit employees are provided with three (3) days of paid personal leave to care for matters of a personal or business nature which cannot be done other than during working hours.

When possible, personal leave should be requested at least five (5) working days in advance of the time off. The supervisor/administrator should approve or deny such requests within two (2) working days of receipt of the request. Involuntary absences occasioned by personal business of an emergency nature may be excused if application is made within five (5) working days upon return to work.

1. Personal Leave may not be used to serve as a witness against the District.
2. After completion of the probationary period, Personal Leave will be prorated for the remainder of the first year based on the three (3) days allowed per school year.
3. Employees are encouraged to take Personal Leave in full day or half-day increments but may take leave in minimum one (1) hour increments. Exceptions will be made for employees with less than one (1) hour left in their shift.
4. Unused Personal Leave is not cumulative from one (1) year to the next and is automatically canceled upon termination of employment.
5. Request for Personal Leave shall be submitted electronically, using the appropriate district system.
6. Personal Leave shall be coordinated and approved by the supervisor, based on efficient operation of the District/worksite. **If efficient operation of the district would not be compromised as determined by the supervisor, then when** ~~When~~ two or more employees request the same Personal Leave date(s), consideration shall be made on a first-come, first-served basis. **When two or more employees simultaneously request the same Personal Leave date(s), the request from the employee with the highest seniority will be considered first.**
7. At the end of the fiscal year, the District will pay each eligible classified employee working for unused personal days, according to the chart below. The number of unused personal days and the amount paid will be adjusted proportionally for employees by FTE. Payment will be no later than the August payroll.

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% of allowed personal days not used	Unused personal days, based on 1.0 FTE	Amount paid, based on .50 to 1.0 FTE	Amount paid, based on .49 FTE or less
100%	3	\$150	\$100
67% - 99%	2 – 2.99	\$75	\$60
33% - 66%	1 – 1.99	\$25	\$20
Less than 33%	0 – 0.99	\$0	\$0

F. **District** Bereavement Leave

Up to three (3) days leave with pay shall be authorized in the event of death of any member of the employee's, spouses, or domestic partner's immediate family as defined in the section "Family." Immediate family includes the employee's spouse or domestic partner or the employee's, the employee's spouse's or domestic partner's, parents, children, stepchildren, grandchildren, brothers, sisters, stepbrothers, stepsisters, grandparents, and loco-in-parentis relationships.

1. Bereavement leave may be used in half-day increments.
2. Upon request, two (2) additional paid bereavement days may be authorized.
3. Any requested time off in excess of five (5) days will be deducted from accrued sick leave or other paid leave.
4. The employee will make a reasonable effort to notify the supervisor of the need for the additional time in advance of the absence, when possible.
5. Requests for bereavement leave to attend the funeral of someone not defined in this section may be granted at the discretion of the Superintendent.
6. The District shall comply with the Oregon Family Leave Act (OFLA) regarding bereavement leave. The paid bereavement leave in this section shall run concurrently with leave under OFLA.

~~7. The definition of "family members" under OFLA is different than the definition of "immediate family" under this section. The additional leave provided under OFLA will only apply to family members defined under the law.~~

G. Legal Leave

Bargaining unit employees will be granted leave with pay for jury service. Employees on jury duty should advise the court that they are on paid leave from their employer and should receive no compensation from the court.

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Employees who are subpoenaed regarding school related business, shall receive their regular wage while officially attending to district related legal matters.

1. This provision excludes any court appearance when an employee is the litigant in a case brought against the District or related to a personal legal/litigation matter. Employees may use personal leave, accrued leave, or accrued compensatory time for all personal legal matters.

Employees called for Jury Duty are expected to call or use the jury duty website the evening before to see if they are required for jury duty. If they are not required for duty, they must report to work.

If an employee is required to appear in person for 2 hours or more on any given day, they are not expected to return to work that day and should provide a time stamp indicating their departure from jury duty to their supervisor.

Upon being excused from jury service during any day, an employee will immediately contact the employee's supervisor and advise the supervisor of the employee's availability to return to work.

H. Unpaid Leave

At the District's discretion, unpaid leaves of up to twelve (12) months may be allowed. Requests for an unpaid leave will be made in writing and will state the reason for the request. An employee must exhaust all applicable paid leave prior to requesting unpaid leave, which may or may not be granted by the supervisor. An employee may request additional unpaid leave.

Denial of an unpaid leave may be appealed to the Board. The Board's decision will be final.

Upon returning to the District following an unpaid leave, the employee will be placed in a position in the same classification with the same hours and on the same step on the salary schedule.

An employee on unpaid leave is subject to the terms and conditions of employment as stated in this Agreement. An unpaid leave may result in the employee assuming the cost of the employee's insurance premium.

I. Parental Leave

Parental Leave shall be granted in accordance with Oregon **statute** **Statutes-ORS 659.360-659.370**

J. Professional Leave

The Superintendent **or designee** may authorize absences of bargaining unit employees for professional purposes with full pay for such events as occasional visiting of other school systems, active participation by Ashland employees in professional programs,

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other professional opportunities which will be likely to extend the outlook and improve the service of the employee and benefit the District.

Bargaining unit employees are to be encouraged to participate in professional events that may provide professional development as agreed upon by the employee and the employee's supervisor.

1. Professional development opportunities outside regularly scheduled hours must be agreed on in advance.

2. For approved professional development opportunities scheduled outside of the employees regularly scheduled hours, the employee can opt to use overtime, compensatory time, or flex time.

~~The employee will make a written request to the Superintendent for the authorization at least ten (10) working days in advance of the event.~~

3. The language in Article 18 relating to district travel, meals, and lodging will apply to authorized professional leave as appropriate.

K. Additional Leave

At the Superintendent's discretion, the Superintendent may authorize paid leave under conditions of emergency, hardship, or benefit to the District.

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ARTICLE 14 - INSURANCE

The Ashland School District is self-insured and provides employees with comprehensive medical, dental and vision coverage. In order for the self-insurance program to be financially beneficial for employees and the District, it is important that employees be well-informed about plan design. Additionally, employees should be aware that insurance rates are impacted by plan design, claims, stop-loss insurance and administrative rates.

To that end, the District has established an Insurance Committee that represents all employee groups in the District. The role of the Insurance Committee that represents all operations related to the District's self-insured program is to collaboratively review any savings or increased expenses, and to consider any changes in plan design and employee contributions. The Association shall have four (4) voting members on the Insurance Committee. Each committee member shall have one vote.

A non-probationary bargaining unit employee hired to work thirty (30) hours per week or more, nine (9) months or more per year, shall have access to health insurance benefits as enumerated in Section A for the employee and dependents. Bargaining unit employees who work twenty (20) hours per week or more, but less than thirty (30) hours per week on a nine (9) month basis or more per year, shall be eligible for "employee only medical only," paid by the District

- A. The employee and district will pay the following portions of the monthly premiums for present insurance benefits, Family Medical, Dental and Vision as follows:

	<u>Employee</u>	<u>District</u>
Employee Only	0%	100%
Employee Plus Child(ren)	9%	91%
Employee Plus Spouse	11%	89%
Employee Plus Family	10%	90%

In no case shall the employees be held responsible for any premium increases greater than \$25 per month in a given year in any category.

- B. Changes may be made on an annual basis, based on insurance renewal dates. Currently, changes can be made in the month of November each year and become effective the following January.
- C. "Employee only" coverage will be guaranteed at no cost for the duration of this Agreement.
- D. Any increase in premiums for these coverages, after the insurance renewal date, in a single insurance year shall be paid by the District.
- E. When a benefit-eligible employee is hired on or before the fifteenth (15th) of the month, insurance coverage will commence on the first (1st) day of the following month. When a benefit-eligible employee is hired after the fifteenth (15th) of the month, insurance coverage will commence on the first (1st) day of the following month, so that coverage for benefit-eligible employees will begin within thirty (30) days from the date of the first day of service.
- F. The District shall continue to provide a Section 125 Plan that includes the following:

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1. A pre-tax option for insurance premiums;
2. A flexible spending account for unreimbursed medical health expenses; and
3. A flexible spending account for dependent care.

The District will continue to make supplemental insurance available for purchase at the discretion of the employee.

- G. Opt-Out—Employees who have medical coverage through another source may opt-out of the District-provided medical, prescription, dental, and vision coverage by providing to the District proof of coverage. The District will then provide the employee with a taxable benefit in the amount of \$200.00 per month. The employee may opt-out at open enrollment or during a qualifying life event. Employees who have medical, prescription, dental, and vision coverage under another Ashland School District employee, do not qualify for this opt-out benefit.
- H. Any currently insured employee who retires and is ineligible for the District supplemental retirement, may elect within sixty (60) days after the employee's effective date of retirement, to access "medical only" insurance coverage for the employee and the employee's spouse and dependent children, if any, until the employee is eligible for Medicare. Only the individuals covered by the group medical insurance at the time of the employee's retirement will have access to the District insurance. Such medical coverage shall be the same as that provided to current employees as enumerated in this Article. The employee shall be responsible for the full payment of such coverage. When the retiree's medical coverage is terminated, access to medical insurance shall be made available for the spouse/domestic partner of a retired employee until the spouse/domestic partner becomes eligible for Medicare. The child of a retiree shall have access to medical insurance until the child reaches age 26. The District will not pay any of the costs of medical insurance for the retiree's dependents.

~~I. In order to assist employees who currently use tobacco products, the District will fund 100% of the cost of one cessation program and 75% of the cost of a second program comparable to the cost of those at Ashland Community Hospital, Rogue Valley Medical Center, and Providence Medford Medical Center.~~

I. Long-Term Disability Insurance

Eligible Employees will pay the entire monthly premium for long-term disability insurance through payroll deduction. ~~This provision is effective upon an agreement by the Ashland Education Association (AEA) to add the classified employee bargaining unit to their long-term disability insurance plan.~~

Eligible is defined as: Classified employees working 20 hours or more per week. Participation is NOT optional.

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ARTICLE 15 - SUPPLEMENTAL RETIREMENT

A. Bargaining unit employees who retire from Ashland School District with fifteen (15) years of continuous service shall be paid a bonus in recognition of the employee's years of service equivalent to \$4.00 for each hour of accumulated sick leave at the time of retirement.

B. Supplemental retirement provides for the continuation of medical insurance benefits for those bargaining unit employees choosing to retire. The Board will make this option available for all eligible classified employees for the duration of this Agreement under the following conditions:

1. The employee must be one-half (½) time or more throughout their employment with the District;
2. Employees hired prior to July 1, 1993, must have been a continuous classified employee (inclusive of paid leaves) of the District for fifteen (15) years or more.

Employees hired on or after July 1, 1993, and before July 1, 2000, must have been a continuous classified employee (inclusive of paid leaves) of the District for eighteen (18) years or more.

Employees hired on or after July 1, 2000, will not be eligible for supplemental retirement.

3. The employee must be eligible for retirement under the Public Employees Retirement System (PERS)/Oregon Public Service Retirement Program.

C. If an employee meets all of the above categories described in Section **B A**, and decides to retire, the following retirement benefits will be provided by the Ashland School District:

1. The District will provide "medical only" insurance coverage for the retiree and the retiree's spouse and dependent children, if any, until the retiree is eligible for Medicare or for a maximum of ten (10) years, whichever comes first. Such medical coverage shall be the same as that provided to current bargaining unit employees as per ~~Article 15C~~. Payment for such coverage shall be as follows:
 - a. The District will pay for the "medical only" coverage for the retiree.
 - b. Retirees choosing to purchase medical coverage for their spouse and dependent children, if any, shall contribute no more than twice the out-of-pocket amount that bargaining unit employees pay for the insurance benefit coverage that is then in existence within the District on a year-to-year basis.

~~2. Bargaining unit employees who retire from Ashland School District with fifteen (15) years of continuous service shall be paid a bonus in recognition of the employee's years of service equivalent to \$4.00 for each hour of accumulated sick leave at the time of retirement.~~

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2. Bargaining unit employees wishing to take advantage of the supplemental retirement benefit must give the District at least four (4) months' notice of intent to retire. Those employees receiving supplemental retirement benefits as of July 1, 2004, will continue to receive those supplemental retirement benefits at the same level as the contract language specified at the time of their retirement from the District.

D. Bargaining unit employees who retire from Ashland School District, and who are subsequently rehired by the District, will receive all contractual rights and benefits under the Collective Bargaining Agreement except those rights and/or benefits expressly set forth below as exclusions:

1. The rate of pay for rehired employees will be established by the District.
2. Retired employees will not bring sick leave forward but will accrue sick leave at the rate of one (1) day per month, and those days will be awarded as they are earned.
3. Contractual supplemental retirement benefits for which the employee may be eligible will not become effective until the end of the employee's service with the District. The supplemental retirement benefits will be based upon the contractual benefits available at the time of retirement.
4. The Association president will be notified in writing in cases of rehire.
5. The District will not be obligated to forward payments to PERS for the re-employed member who is already drawing PERS benefits.
6. An employee who retires prior to the end of the fiscal year may continue in the employee's same position until the end of the fiscal year.
7. If a retiree wishes to continue employment with the District in another position, the District must first post the position and ensure that no current bargaining unit employee who applies for the position is qualified prior to awarding the position to a retiree.
8. Bargaining unit employees on a recall list shall be eligible for placement in a vacant position prior to a retiree.

E. Tax Shelter Annuity Program

Effective July 1, 2022, Classified employees working at least .5 FTE and employed for at least one year will be eligible for district match in the 403b program. The intent of this program is to provide financial assistance during retirement to support medical insurance needs.

Employees who choose to participate will be eligible for a match based on the following schedule:

1. For participation months 1 through 120, the District will match employee contributions up to \$25 per month.

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2. For participation months 121 through 240, the District will match employee contributions up to \$35 per month. For participation months 241 through 360, the District will match employee contributions up to \$45 per month.

Additional employee contributions are allowable up to the legal maximums. Employees may adjust their contribution levels on a monthly basis.

Employees who do not receive pay over the summer, will not have a match in those months.

This 403b is portable and will follow employees should they leave the District's employment.

The 403b is fully vested after 72 months of participation. Employees who have been participating in the 403(b) plan prior to the creation of this Article shall receive credit for vesting.

For purposes of calculating an employee's matching contribution from the District, employees who have participated in the 403(b) plan prior to the creation of this Article shall receive credit for participation up to a maximum of 121 months.

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ARTICLE 16 - STANDING COMMITTEES

The parties agree to establish standing committees. These committees will be charged with dealing with ongoing problems and/or concerns throughout the duration of this Agreement. No committee shall have the power or authority to change any portion of the Collective Bargaining Agreement without approval of the District and the Association membership except as indicated in this Article. Each committee shall develop guidelines and procedures pertaining to its particular duties and membership of the committee.

A. Labor-Management Committee

The parties agree to establish regular communications through Labor-Management meetings with the intent of addressing employee/employer issues as they relate to the Collective Bargaining Agreement and workplace issues. The parties shall mutually develop the specific functions and membership of the Labor-Management Committee.

B. Insurance Committee

The District and the Association agree to jointly participate in an insurance committee for the purpose of examining ways in which insurance costs can be controlled for both parties. The Insurance Committee is made up of representatives from each employee group. The committee will consist of an equal number of classified employees, as there are licensed, and district office employees, but limiting the total committee members of each group to (4) four. All employee groups must be present, and each committee member shall have one vote.

The parties agree there will be only four (4) classified employees on the Insurance Committee. The four will have voting rights and will be paid for their participation.

If a classified voting member leaves the committee, one of the four non-paid/non-voting members may take the place of the voting member, but the non-voting member will not be replaced.

The committee shall receive regular reports from the third-party administrator regarding claims, benefits, and any potential cost increases. The committee will consider any changes in rates or benefits prior to adoption to ensure that the District's self-insured health insurance program is operating efficiently. The committee has the authority to alter, modify, or amend this Agreement without prior approval of the District and Association membership.

C. Health Promotion Committee

The Health Promotion Committee is dedicated to maintaining a culture of wellness by providing Ashland School District employees with the very best tools and resources to help build and sustain a results-oriented health promotion program. The Health Promotion Committee shall be comprised of members from every employee group.

D. Safety Committee

The Safety Committee has membership from every employee group, and is charged with ensuring safe and healthy environments at every school and work site, **including addressing staff injuries resulting from student behaviors**. The Safety Committee

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meets on a monthly basis and receives reports from site inspections regarding potential safety issues. It also reviews safety procedures and policies and makes recommendations on how to strengthen these policies. Regular Safety Committee meetings are required by state law and are recommended as best practice by the District's liability carrier.

E. Equity Committee

The Equity Committee has membership from every employee group, and comprises representatives from diverse backgrounds, ensuring inclusivity and representation from all segments of our community. Tasked with promoting equity and inclusion across all aspects of the District, the committee convenes regularly to examine policies, practices, and procedures through an equity lens.

F. Classification Review Committee

The Classification Review Committee is constituted for the purpose of reviewing employee **reclassification** **re-classification** requests and shall comply with the following guidelines:

1. The Committee shall be established by September 30 of each year.
2. The Committee shall be comprised of three (3) classified employees and three (3) administrators. The District and Association shall select their own member representatives. The parties may mutually agree to have an outside consultant assist with the process.
3. Classified employees serving on this Committee shall not review their own **reclassification** **re-classification** request.
4. The Committee shall meet two times a year after work hours; once in October and once in February.
5. The Committee shall use the Classification Flowchart (Appendix E) as the process for determining **reclassification** **re-classification** decisions. Any other committee procedures will be determined mutually by the parties during the meeting.

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ARTICLE 17 - STRIKES AND LOCKOUTS

- A. Bargaining unit employees covered under this Agreement agree not to participate in a strike during the term of this Agreement.
- B. There shall be no "lockout" of bargaining unit employees during the term of this Agreement.

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ARTICLE 18 - MISCELLANEOUS

A. District Travel

Any employee in the bargaining unit required to use the employee's vehicle on district business shall be reimbursed at the current Internal Revenue Service rate for all miles driven on behalf of the District.

B. Lodging, Meals, and Registration Fees

Reimbursement rates for meals and lodging shall be based upon the rates established by the General Services Administration (GSA) located at www.gsa.gov/perdiem. The District will assume the cost of the Registration fee.

Paid Meals: When employee(s) are scheduled to accompany students on a trip, they shall be entitled to reimbursement if the employee turns in an itemized receipt and the trip spans the following timeframes:

Breakfast: If the employee is expected to report for the trip prior to 6:00 a.m.

Lunch: If the trip extends beyond 2:00 p.m.

Dinner: If the trip extends beyond 6:00 p.m.

C. Physical Examination

If physical examinations and/or drug testing are required as a condition of continued employment, the District will pay the cost to a physician and/or laboratory of the District's choice. Whenever possible, the physical examination and/or drug testing shall be scheduled during the employee's regular work hours and this will be considered paid time. If the District is unable to schedule a physical examination and/or drug testing during the employee's regular work hours, the employee shall be compensated for the additional time required.

Should an employee disagree with the findings of the District's physician, the employee may be examined by the employee's personal physician at the employee's cost.

Should the District's physician and the employee's personal physician disagree regarding the employee's physical ability to continue employment, the employee may be examined by a third physician mutually agreed upon by the District and the employee, who shall make the final determination. The cost of this examination shall be borne by the District.

D. Compensation During Required Training Periods

If the training is required by the District, the cost shall be borne by the District and comply with BOLI regulations. **Whenever possible, required trainings shall be scheduled during the employee's regular work hours and this will be considered paid time.**

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ARTICLE 19 - MODIFICATION OF AGREEMENT

This Agreement shall not be modified **in whole or in** part by either party except through **renegotiation** **a Memorandum of Understanding (MOU)**. Such modification shall be reduced to writing and signed by the Board Chair, **and the President of** the Association **President, and the OSEA Field Representative**.

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ARTICLE 20 - EXISTING CONDITIONS

The District agrees to follow all applicable federal and state laws. The Association retains the right to bargain any changes to policies that affect mandatory subjects of bargaining.

~~Only such existing and future work rules and benefits as are specifically covered by the terms of this Agreement shall be affected by recognition of the Association and the execution of the Agreement.~~

Key: **New Language** **Removed Language** **Housekeeping**

ARTICLE 21 - SEPARABILITY OF PROVISIONS

In the event that any provision of this Agreement shall, at any time, be declared invalid by any court of competent jurisdiction, such decisions should apply to only a specific article, section, or portion thereof, directly specified in the decision. Such a decision shall not invalidate the entire Agreement, it being the expressed intention of the parties hereto, that all other provisions not declared invalid shall remain in full force and effect. The provision(s) in question may be re- bargained at the request of either party using the 90-day interim bargaining process under ORS 243.698.

Key: **New Language** **Removed Language** **Housekeeping**

ARTICLE 22 - DURATION OF AGREEMENT

This Agreement shall be effective upon execution and shall remain in full force and effective through June 30, **2027** **2024**. If either party wishes to renew or modify this Agreement, to be effective beyond June 30, **2027** **2024**, the other party shall be notified at least sixty (60) days prior to its expiration.

There shall be three (3) signed copies of the final Agreement for the purpose of records.

Before the expiration of this agreement the District shall cease utilizing all non-bargaining unit workers in Food Service and Custodial unless mutually agreed otherwise.

During the 2024-25 fiscal year, the parties agree to re-open negotiations for compensation for the 2025-26 fiscal year.

During the 2025-26 fiscal year, the parties agree to re-open negotiations for compensation for the 2026-27 fiscal year.

During the **2026-27** **2023-24** fiscal year, the parties agree to re-open negotiations for the full contract.

OREGON SCHOOL EMPLOYEES ASSOCIATION CHAPTER 42

By: _____

Steven Essig
OSEA Chapter 42 President

Date: _____

By: _____

Melissa Scaglione
OSEA Field Representative

Date: _____

BOARD OF EDUCATION ASHLAND SCHOOL DISTRICT

By: _____

Rebecca Dyson
Board Chairperson

Date: _____

By: _____

Joseph Hattrick
Superintendent

Date: _____

Key: **New Language** **Removed Language** **Housekeeping**

APPENDIX A - LEGACY SUPPLEMENTAL RETIREMENT EMPLOYEES GRANDFATHERED FOR SUPPLEMENTAL RETIREMENT

The following employees will be eligible for district Supplemental Retirement after fifteen (15) years of half-time or more continuous service with the District, once they are PERS eligible.

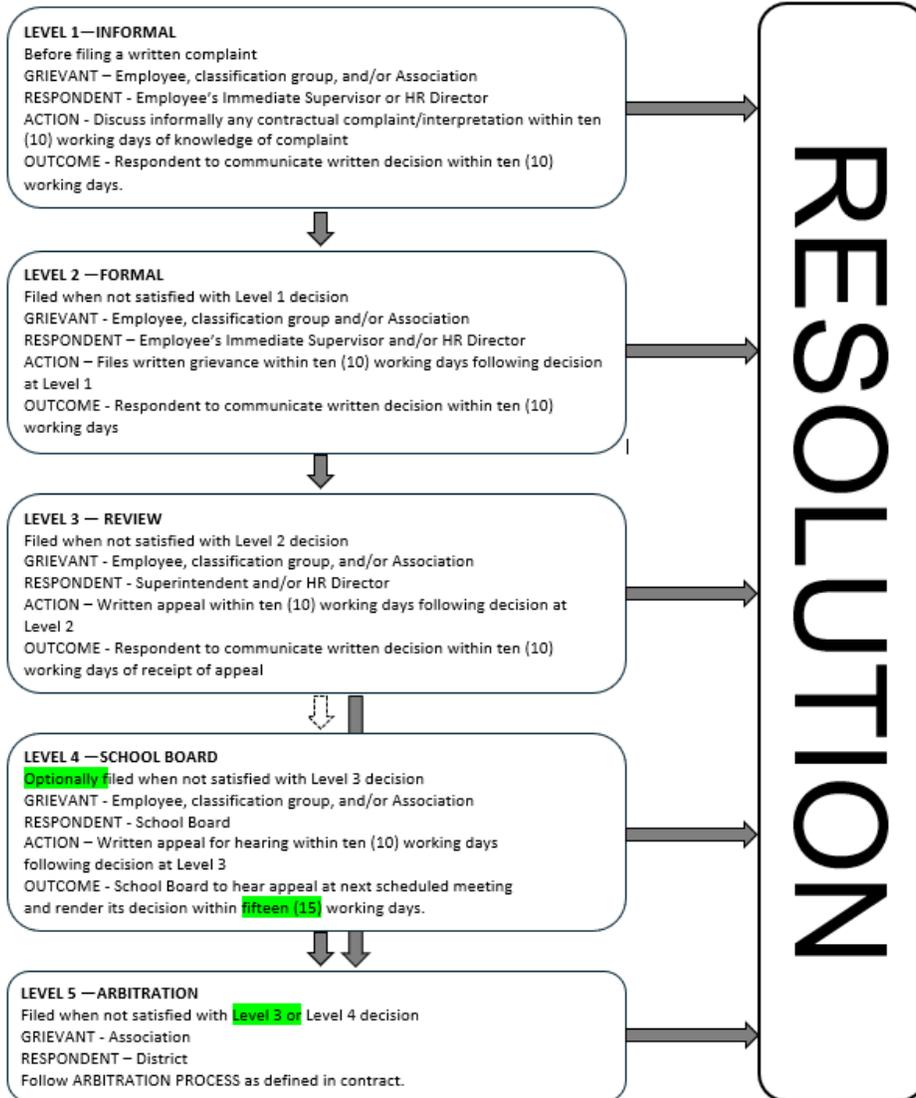
Albert, Don
Grimmesey, Shawn
Steele, Nancy

The following employees will be eligible for district Supplemental Retirement after eighteen (18) years of half-time or more continuous service with the District, once they are PERS eligible.

Baker, Terri	Miedecke, Debbie	Wood, Malinda
Burnett, Tamra	Myers, Terry	Wright, Margaret
Gottle, Tara	Pasche, Karin	
Cummings, Brad		

Key: **New Language** **Removed Language** **Housekeeping**

APPENDIX B - GRIEVANCE PROCESS FLOWCHART



Key: **New Language** **Removed Language** **Housekeeping**

APPENDIX C-1 2024-2025 CLASSIFIED SALARY SCHEDULE

	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8
Crossing Guard	\$ 17.62	\$ 18.11	\$ 18.60	\$ 19.14	\$ 19.67	\$ 20.22	\$ 20.79	\$ 21.40
After School Activities Coordinator	\$ 17.46	\$ 17.99	\$ 18.53	\$ 19.10	\$ 19.69	\$ 20.29	\$ 20.90	\$ 21.56
Theatre Coordinator	\$ 19.40	\$ 19.99	\$ 20.61	\$ 21.26	\$ 21.92	\$ 22.59	\$ 23.30	\$ 24.01
College & Career Specialist	\$ 25.10	\$ 25.92	\$ 26.77	\$ 27.65	\$ 28.57	\$ 29.50	\$ 30.48	\$ 31.48
Bilingual Equity & Access Specialist	\$ 22.35	\$ 23.02	\$ 23.71	\$ 24.41	\$ 25.15	\$ 25.91	\$ 26.68	\$ 27.49
Youth Advocate	\$ 18.94	\$ 19.48	\$ 20.03	\$ 20.59	\$ 21.22	\$ 21.83	\$ 22.47	\$ 23.14
Bus - Wait & Training Time	\$ 15.03							
Bus Driver - Stand By	\$ 17.46	\$ 17.99	\$ 18.53	\$ 19.10	\$ 19.69	\$ 20.29	\$ 20.90	\$ 21.56
Bus Driver - Maintenance I Rate	\$ 18.24	\$ 18.80	\$ 19.36	\$ 19.95	\$ 20.58	\$ 21.21	\$ 21.86	\$ 22.55
Bus Driver	\$ 18.24	\$ 18.80	\$ 19.36	\$ 19.95	\$ 20.58	\$ 21.21	\$ 21.86	\$ 22.55
Bus Driver - Special Needs	\$ 18.24	\$ 18.80	\$ 19.36	\$ 19.95	\$ 20.58	\$ 21.21	\$ 21.86	\$ 22.55
Bus Driver - Relief	\$ 18.24	\$ 18.80	\$ 19.36	\$ 19.95	\$ 20.58	\$ 21.21	\$ 21.86	\$ 22.55
Bus Driver - Trainer	\$ 19.40	\$ 19.99	\$ 20.61	\$ 21.26	\$ 21.92	\$ 22.59	\$ 23.30	\$ 24.01
Bus Mechanic	\$ 20.16	\$ 20.76	\$ 21.39	\$ 22.08	\$ 22.76	\$ 23.47	\$ 24.20	\$ 24.97
Custodian	\$ 18.50	\$ 19.03	\$ 19.57	\$ 20.14	\$ 20.73	\$ 21.33	\$ 21.94	\$ 22.60
Custodian - Bus	\$ 17.46	\$ 17.99	\$ 18.53	\$ 19.10	\$ 19.69	\$ 20.29	\$ 20.90	\$ 21.56
Assistant Head Custodian - AMS/AHS	\$ 19.47	\$ 19.98	\$ 20.52	\$ 21.07	\$ 21.63	\$ 22.26	\$ 22.87	\$ 23.51
Head Custodian - ELEM/AMS	\$ 19.47	\$ 19.98	\$ 20.52	\$ 21.07	\$ 21.63	\$ 22.26	\$ 22.87	\$ 23.51
Head Custodian - AHS	\$ 19.98	\$ 20.52	\$ 21.07	\$ 21.63	\$ 22.26	\$ 22.87	\$ 23.51	\$ 24.18
Lead Custodian	\$ 21.84	\$ 22.43	\$ 23.06	\$ 23.72	\$ 24.39	\$ 25.08	\$ 25.80	\$ 26.55
Educational Assistant	\$ 17.62	\$ 18.11	\$ 18.60	\$ 19.14	\$ 19.67	\$ 20.22	\$ 20.79	\$ 21.40
Educational Assistant - SPED I	\$ 17.62	\$ 18.11	\$ 18.60	\$ 19.14	\$ 19.67	\$ 20.22	\$ 20.79	\$ 21.40
Educational Assistant - SPED II	\$ 20.04	\$ 20.60	\$ 21.20	\$ 21.80	\$ 22.43	\$ 23.08	\$ 23.75	\$ 24.45
Educational Assistant - Site Based	\$ 19.43	\$ 19.98	\$ 20.55	\$ 21.14	\$ 21.73	\$ 22.36	\$ 23.02	\$ 23.69
Educational Assistant - Bilingual	\$ 19.43	\$ 19.98	\$ 20.55	\$ 21.14	\$ 21.73	\$ 22.36	\$ 23.02	\$ 23.69
Educational Assistant - Media Assistant	\$ 17.62	\$ 18.11	\$ 18.60	\$ 19.14	\$ 19.67	\$ 20.22	\$ 20.79	\$ 21.40
Library Manager	\$ 17.73	\$ 18.24	\$ 18.80	\$ 19.36	\$ 19.95	\$ 20.58	\$ 21.21	\$ 21.86
Special Education Clerk	\$ 19.43	\$ 19.98	\$ 20.55	\$ 21.14	\$ 21.73	\$ 22.36	\$ 23.02	\$ 23.69
Speech & Language Pathology Assistant	\$ 25.70	\$ 26.98	\$ 27.79	\$ 28.62	\$ 29.48	\$ 30.37	\$ 31.28	\$ 32.22
Food Service Worker	\$ 16.12	\$ 16.55	\$ 16.95	\$ 17.40	\$ 17.86	\$ 18.31	\$ 18.79	\$ 19.29
Cafeteria Manager	\$ 18.17	\$ 18.69	\$ 19.22	\$ 19.78	\$ 20.34	\$ 20.94	\$ 21.54	\$ 22.18
Maintenance I	\$ 18.17	\$ 18.69	\$ 19.22	\$ 19.78	\$ 20.34	\$ 20.94	\$ 21.54	\$ 22.18
Maintenance II	\$ 20.06	\$ 20.64	\$ 21.25	\$ 21.88	\$ 22.53	\$ 23.18	\$ 23.88	\$ 24.58
Maintenance III	\$ 20.80	\$ 21.39	\$ 22.02	\$ 22.68	\$ 23.35	\$ 24.04	\$ 24.76	\$ 25.51
Maintenance - HVAC	\$ 21.86	\$ 22.52	\$ 23.17	\$ 23.86	\$ 24.56	\$ 25.30	\$ 26.06	\$ 26.85
Maintenance - Electrician	\$ 26.85	\$ 27.68	\$ 28.53	\$ 29.40	\$ 30.31	\$ 31.27	\$ 32.23	\$ 33.24

Key: **New Language** **Removed Language** **Housekeeping**

APPENDIX C-1 2024-2025 CLASSIFIED SALARY SCHEDULE (cont.)

	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8
Secretary I	\$ 16.61	\$ 17.12	\$ 17.62	\$ 18.17	\$ 18.71	\$ 19.27	\$ 19.86	\$ 20.49
Secretary II	\$ 17.46	\$ 17.99	\$ 18.53	\$ 19.10	\$ 19.69	\$ 20.29	\$ 20.90	\$ 21.56
Office Manager - Elementary/Athletics	\$ 18.94	\$ 19.48	\$ 20.03	\$ 20.59	\$ 21.22	\$ 21.83	\$ 22.47	\$ 23.14
Office Manager - Middle School	\$ 19.40	\$ 19.99	\$ 20.61	\$ 21.26	\$ 21.92	\$ 22.59	\$ 23.30	\$ 24.01
Office Manager - High School	\$ 20.16	\$ 20.76	\$ 21.39	\$ 22.08	\$ 22.76	\$ 23.47	\$ 24.20	\$ 24.97
Registrar - Middle School	\$ 18.24	\$ 18.80	\$ 19.36	\$ 19.95	\$ 20.58	\$ 21.21	\$ 21.86	\$ 22.55
Registrar - High School	\$ 19.40	\$ 19.99	\$ 20.61	\$ 21.26	\$ 21.92	\$ 22.59	\$ 23.30	\$ 24.01
Administrative Assistant Student Services Program	\$ 19.40	\$ 19.99	\$ 20.61	\$ 21.26	\$ 21.92	\$ 22.59	\$ 23.30	\$ 24.01
Assistant Student Services Program	\$ 23.54	\$ 24.27	\$ 25.03	\$ 25.83	\$ 26.64	\$ 27.49	\$ 28.34	\$ 29.23
Assistant II	\$ 26.00	\$ 26.83	\$ 27.70	\$ 28.58	\$ 29.49	\$ 30.43	\$ 31.41	\$ 32.42
School Bookkeeper	\$ 19.40	\$ 19.99	\$ 20.61	\$ 21.26	\$ 21.92	\$ 22.59	\$ 23.30	\$ 24.01
Accounting Assistant	\$ 20.16	\$ 20.76	\$ 21.39	\$ 22.08	\$ 22.76	\$ 23.47	\$ 24.20	\$ 24.97
Computer Lab Coordinator	\$ 17.46	\$ 17.99	\$ 18.53	\$ 19.10	\$ 19.69	\$ 20.29	\$ 20.90	\$ 21.56
Technical Services Coordinator	\$ 17.46	\$ 17.99	\$ 18.53	\$ 19.10	\$ 19.69	\$ 20.29	\$ 20.90	\$ 21.56
IT Support Specialist	\$ 19.09	\$ 19.68	\$ 20.28	\$ 20.89	\$ 21.54	\$ 22.20	\$ 22.89	\$ 23.61
IT Support Specialist II	\$ 23.81	\$ 24.53	\$ 25.27	\$ 26.04	\$ 26.83	\$ 27.65	\$ 28.50	\$ 29.37
IT Support Specialist III	\$ 28.53	\$ 29.44	\$ 30.38	\$ 31.36	\$ 32.36	\$ 33.42	\$ 34.50	\$ 35.63
Network Technician	\$ 19.98	\$ 20.60	\$ 21.24	\$ 21.91	\$ 22.58	\$ 23.28	\$ 24.00	\$ 24.76
Systems Analyst	\$ 26.34	\$ 27.20	\$ 28.05	\$ 28.94	\$ 29.88	\$ 30.86	\$ 31.84	\$ 32.86
Programmer Analyst I	\$ 30.72	\$ 32.26	\$ 33.23	\$ 34.22	\$ 35.25	\$ 36.31	\$ 37.40	\$ 38.52
Programmer Analyst III	\$ 39.22	\$ 40.38	\$ 41.59	\$ 42.85	\$ 44.13	\$ 45.46	\$ 46.82	\$ 48.22
Network Engineer I	\$ 28.62	\$ 29.54	\$ 30.49	\$ 31.47	\$ 32.49	\$ 33.54	\$ 34.63	\$ 35.76
Network Engineer II	\$ 33.10	\$ 34.20	\$ 35.31	\$ 36.45	\$ 37.64	\$ 38.88	\$ 40.15	\$ 41.46
Network Engineer III	\$ 39.22	\$ 40.38	\$ 41.59	\$ 42.85	\$ 44.13	\$ 45.46	\$ 46.82	\$ 48.11
Software Developer	\$ 33.10	\$ 34.20	\$ 35.31	\$ 36.45	\$ 37.64	\$ 38.88	\$ 40.15	\$ 41.46

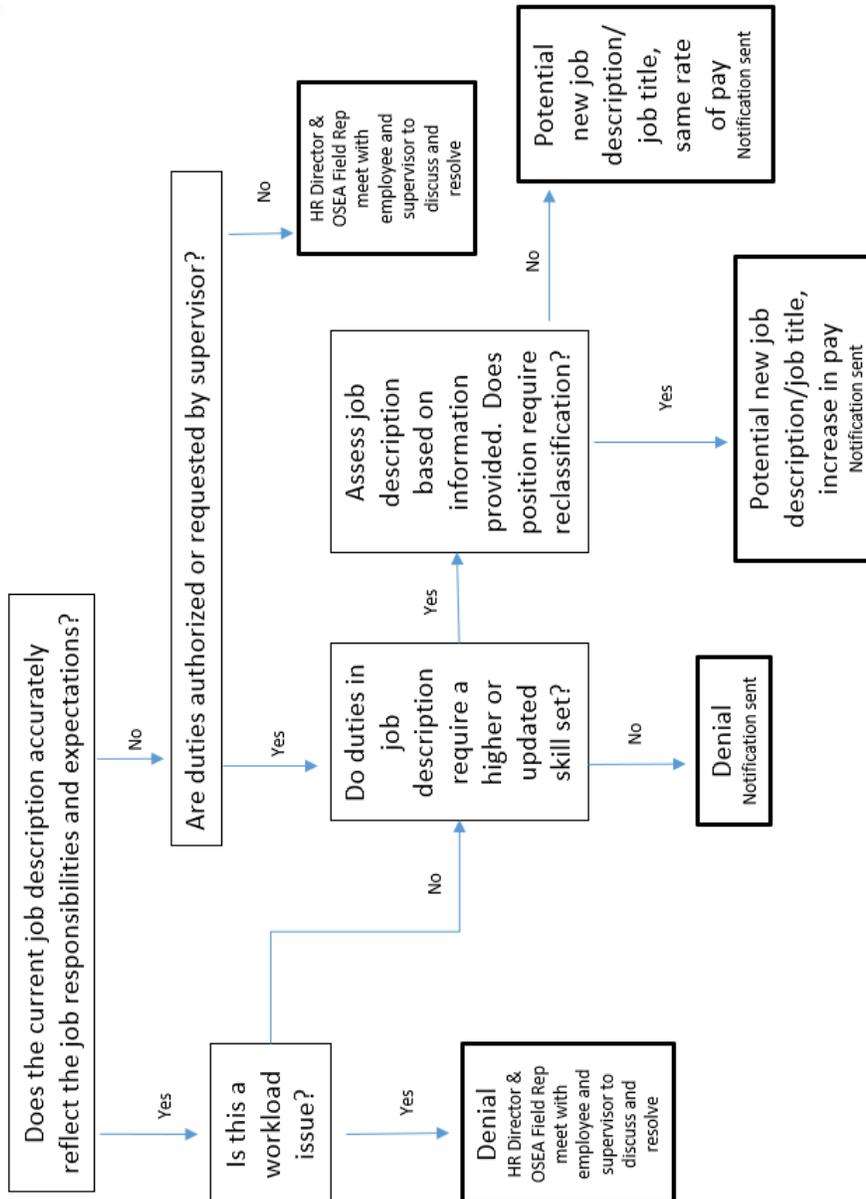
Key: **New Language** **Removed Language** **Housekeeping**

**APPENDIX D-1 through 4: 2021-2022 LONGEVITY SCHEDULE,
MEMORIALIZED, & SPECIAL RETAINED LONGEVITY**

**in development. TO BE FINALIZED AND ADDED AFTER
RATIFICATION*

Key: **New Language** **Removed Language** **Housekeeping**

APPENDIX E - RECLASSIFICATION REVIEW FLOWCHART



Key: **New Language** **Removed Language** **Housekeeping**

APPENDIX TBD - SALARY STEP PLACEMENT RUBRIC

1) Meet Minimum Qualifications (Education / Experience or combination of Education and Experience).

2) AA and Bachelor's Degree or above equals one year of experience for step placement.

3) Years of related paid experience shall be used to determine salary step placement.

One year of related experience may equal one year in a 12 month position or a full school year. Employment history must be verified.

4) Internally an employee must work 6 months in the current year to be eligible to receive a step on the pay schedule in the following year.

5) Continuous substitute experience is recognized as experience in relation to movement on steps on the pay schedule based on frequency or FTE.

Key: **New Language** **Removed Language** **Housekeeping**

APPENDIX TBD - GRIEVANCE FORM

OSEA Grievance



Grievance Date:			Grievance Step/Level:		
Grievant Name or Group Grievance:			Chapter:		
Street Address:			Home Phone:	Work Phone:	
City:	State:	Zip:	Employer:		
Classification:			Work Location:		
Department:			Supervisor:		
OSEA Field Representative:	Phone:		Timeline Comments:		

List applicable violated Article(s) and Section(s):

Statement of Grievance:

Adjustment Required:

I hereby authorize OSEA to represent me. I also grant the field representative full access to any and all of my personnel files until such time as grievance representation is no longer needed.

Signature of Grievant: _____ Date: _____
Signature of Field Rep: _____ Date: _____
Received by Employer: _____ Date: _____

Original to: Employer (hand-delivery and/or email, USPS mail)
Copies to: OSEA chapter president, OSEA chapter file.

Revised: July 2024

Ashland School District 5

Code: EFA
Adopted: 9/12/16
Readopted: 5/08/17
Orig. Code(s): EFA

Local Wellness Program

UPDATE: 8/30/2023

NOTE: ITEMS IN BRACES { } ARE INFORMATION ONLY. ITEMS IN BRACKETS [] ARE OPTIONAL AND DISTRICTS CAN SELECT FROM AMONG THEM. RECOMMENDATION IS TO DELETE EXISTING AR FOR THIS POLICY.

{Required. Title 7 C.F.R. 210.31(a) requires local education agencies to “establish a local school wellness policy for all schools participating in the National School Lunch Program and/or School Breakfast Program...”. The law describes the policy as “a written plan that includes” various components intended to improve student wellness. This policy is designed to meet the requirements for a wellness policy and provide the framework for the district’s plan. Previously these requirements were split between the policy and an administrative regulation (AR). All required and/or related content is now included in the model policy, therefore OSBA recommends deleting the AR if the district previously included it in the board’s policy manual. Districts should consult with stakeholders in the process of adoption and incorporate language that meets the unique needs of the district.}

~~The Board recognizes that childhood obesity has become an epidemic in Oregon as well as throughout the nation. Research indicates that obesity and many diseases associated with obesity are largely preventable through diet and regular physical activity. Additional research indicates that healthy eating patterns and increased physical activity are essential for students to achieve their academic potential, full physical and mental growth and lifelong health and well-being.~~

~~The district is committed to the optimal development of every student and believes that a positive, safe, and health-promoting learning environment is necessary for students to have the opportunity to achieve personal, academic, developmental, and social success.~~

To help ensure students possess the knowledge and skills necessary to make healthy choices for a lifetime, the superintendent shall prepare and implement a comprehensive district nutrition program consistent with state and federal requirements for districts sponsoring the National School Lunch Program (NSLP) and/or the School Breakfast Program (SBP). The program shall reflect the Board’s commitment to providing adequate time for instruction ~~to promote that fosters~~ healthy eating through nutrition education, serving healthy and appealing foods at district schools, developing food-use guidelines for staff and establishing liaisons with nutrition service providers, as appropriate.

~~The input of staff (including but not limited to, physical education and school health professionals), students, parents, the public, representatives of the school food authority and public health professionals will be encouraged. The superintendent will develop administrative regulations as necessary to implement the goals of this policy throughout the district.~~

~~[The district superintendent or designee shall establish a Wellness Advisory Committee to advise the district in the development, review and update of the local wellness policy.]~~

POLICY IMPLEMENTATION, MONITORING, ACCOUNTABILITY AND COMMUNITY ENGAGEMENT

Implementation

The district shall manage and coordinate the implementation of this local wellness policy.

Implementation will consist of, but not be limited to, the following:

1. Delineating roles, responsibilities, actions and timelines specific to each school;
2. Generating and disseminating information about who will be responsible to make what change, by how much, where and when;
3. Establishing standards for all foods and beverages provided (but not sold) to students during the school day on participating school campuses;
4. Establishing standards and nutrition guidelines for all foods and beverages sold to students during the school day on participating school campuses that meet state and federal nutrition standards for NSLP and SBP, competitive foods, permit marketing of same that meets the competitive food nutrition standards, and promotes student health and reduces child obesity; and
5. Establishing specific goals for nutrition promotion and education, physical activity [, physical education] and other school-based activities that promote student wellness.

The Board designates the [principal(s)] to be responsible for ensuring each school meets the goals outlined and complies with this policy.

[Record Keeping

The district will retain the following records to document compliance with the local wellness policy requirements at the district's administrative offices:

1. The written local wellness policy;
2. Documentation to demonstrate the policy has been made available to the public;
3. Documentation of efforts to review and update the local wellness policy, including an indication of who participates in the update and the methods the district uses to make stakeholders aware of their ability to participate;
4. Documentation to demonstrate compliance with the annual public notification requirements;.]

Notification of Policy

The district will inform the public about the content and implementation of the local wellness policy, and post the policy and any updates to the policy on the district website annually. Included will be, if available, the most recent assessment of the implementation, and a description of the progress being made in attaining the goals of the policy.

The district will publicize the name and contact information of the district or school official(s) leading and coordinating the policy and information on how the public can get involved with the local wellness policy. This information will be published on the district's website and in district communications.

Triennial Progress Assessments

At least once every three years, the district will evaluate the implementation of this policy and its progress with a triennial assessment and produce a progress report that will include:

1. The extent to which schools under the jurisdiction of the district are in compliance with the policy;
2. The extent to which the district’s policy compares to model local school wellness policy^{1}; and
3. A description of the progress made in attaining the goals of the district’s policy.

The district will publish the triennial progress report on the district website when available. The district will update or modify the policy based on results of the triennial assessment.

Community Involvement, Outreach and Communications (Review of, and Updating Policy)^{2}

The district will actively communicate ways in which the community can participate in the development, implementation and periodic review and update of the local wellness policy. The district will communicate information about opportunities [on the district’s website, on school websites, and/or in district or school communications]. The district will ensure that communications are culturally and linguistically appropriate to the community.

Parents, students, representatives of the school food authority, teachers of physical education, school health professionals, the Board, school administrators, and the general public will be solicited to participate in the periodic review and update of the local school wellness policy.

[Wellness Advisory Committee]^{3}

The district supports a wellness advisory committee to assist the development, implementation, and periodic review and update of the local wellness policy. The superintendent or designee will be a member of this committee.

The district will publicize information about the wellness advisory committee [in community news, in communications to parents, and/or on websites operated by the district] to communicate to parents, students and the community at large to explain the committee’s purpose, process and an invitation to volunteer.

1. The wellness advisory committee membership will include, to the extent possible, but not be limited to:
 - a. Parents, caregivers and students;
 - b. Representatives of the school nutrition program (e.g., school nutrition director);
 - c. School administrators (e.g., superintendent, assistant superintendent, principal, vice principal);
 - d. Board members;

¹ {Model Wellness Policy resource published by the Alliance for a Healthier Generation. OSBA makes no representation of its compliance by providing this resource.}

² {USDA Local school wellness policy resource; CDC resource; CDC Healthy Schools resource; USDA Local school wellness policy outreach toolkit and communication resource from Alliance for a Healthier Generation.}

³ {A Wellness Advisory Committee is not required. If the district chooses to have a committee, the district should amend the language here to establish the membership and responsibilities of the committee. *School Wellness Committee Toolkit* published by the Alliance for a Healthier Generation}

2. The committee, appointed by the superintendent or designee, will meet to organize and vote on a committee chair and a secretary prior to or at the beginning of the school year. The chair and secretary will serve for one year minimum and may be reappointed.
3. The wellness advisory committee will meet **one** time per year to review of the local wellness policy.
4. The committee will facilitate the development, review and update of the wellness policy, and evaluate each participating school's compliance with the policy.

Nutrition Promotion and Nutrition Education

Nutrition promotion and nutrition education positively influence lifelong eating behaviors by using evidence-based strategies and techniques and nutrition messages and by creating food environments that support healthy nutrition choices. supports the integration of nutrition education throughout the school environment. Nutrition education topics shall be integrated within the sequential, comprehensive health education program taught at every grade level, prekindergarten through grade 12, and coordinated with the district's nutrition and food services operation.

[Nutrition promotion and nutrition education shall be a sequential and integrated focus on improving students' eating behaviors, reflect evidence-based strategies and be consistent with state and local district health education standards.]

To promote nutrition education in the schools, the principal is responsible for ensuring the following goals are implemented:

1. {⁴} [Students and staff will receive consistent nutrition messages throughout the school environment;
2. Nutrition education is provided throughout the student's school years as part of the district's age-appropriate, comprehensive nutrition program and is aligned and coordinated with the Oregon Health Education Standards and school health education programs;
3. Nutrition education will include culturally relevant, participatory activities that include social learning strategies and activities that are aligned and coordinated with the Oregon Health Education Standards and school health education programs;
4. Teachers will receive curriculum-specific training;
5. Parents and families are encouraged through school communications to send healthy snacks/meals and water bottles with their student to school;
6. Families and community organizations are involved, to the extent practicable, in nutrition education;

⁴ {The goals listed are examples; districts are required to include goals in the policy. Districts are encouraged to evaluate needs and resources and to develop specific goals. Districts are required to "review and consider evidence-based strategies and techniques" (7 CFR 210.31(c)(1)). Model Wellness Policy resource published by the Alliance for a Healthier Generation. OSBA makes no representation of its compliance by providing this resource.}

7. Nutrition education homework that students can do with their families is assigned (e.g., reading and interpreting food labels, reading nutrition-related newsletters, preparing healthy recipes);
8. Materials on how to assess one’s personal eating habits, set goals for improvement and achieve those goals.]

Nutrition promotion, including marketing and advertising nutritious foods and beverages to students, will be implemented consistently through a comprehensive and multi-channel approach, (e.g., in the classroom, cafeteria and at home) by staff, teachers, parents, students and the community.

To ensure adequate nutrition promotion, the following goals will be implemented:

1. {⁵} [Information about available meal programs is distributed prior to or at the beginning of the school year and at other times throughout the school year;

2. Information about availability and location of a Summer Food Service Program (SFSP) is distributed;

3. Families are invited to attend exhibitions of student nutrition projects or health fairs;

School Meals

[Schools within the district participate in U.S. Department of Agriculture (USDA) child nutrition program(s), administered through the Oregon Department of Education (ODE)[.] [which may include the NSLP[.] [and] [the SBP,] [Fresh Fruit & Vegetable Program (FFVP),] [Summer Food Service Program (SFSP).].] [The district also operates additional nutrition-related programs and activities including Farm-to-School programs, school gardens, Mobile Breakfast carts or Grab ‘n’ Go Breakfast.]

The district’s available meal program(s) will operate to meet meal pattern requirements and dietary specifications in accordance with the Healthy, Hunger-Free Kids Act and applicable federal laws and regulations.

The [principal(s)] will support nutrition and food services operation as addressed in Board policy EFAA – District Nutrition and Food Services and its accompanying administrative regulation EFAA-AR – Reimbursable Meals and Milk Programs.

Water

Free, safe, unflavored, drinking water will be available to all students throughout the school day and throughout every school campus. The district will make drinking water available where school meals are served during mealtimes.]

Competitive Foods and Beverages

⁵ {The goals listed are examples; districts are required to include goals in the policy. Districts are encouraged to evaluate needs and resources and to develop specific goals. Districts are required to “review and consider evidence-based strategies and techniques” (7 CFR 210.31(c)(1)). Model Wellness Policy resource published by the Alliance for a Healthier Generation. OSBA makes no representation of its compliance by providing this resource.}

The district controls the sale of all competitive foods. All foods and beverages outside the reimbursable school meal programs that are **sold** to students on the school campus during the school day will meet or exceed Smart Snacks Standards⁶.

Celebrations and Rewards/Incentives

All foods and beverages offered on the school campus **[will meet]** the nutrition standards set by the USDA and the **Oregon Smart Snacks Standards**. This includes, but is not limited to, celebrations, parties, and classroom snacks brought by parents. [Food will not be used as a reward or incentive.] [This information will be conveyed to staff and parents.]

[Fund Raising]

Foods and beverages that meet or exceed the nutrition standards set by the USDA and the Oregon Smart Snacks Standards may be sold through fund raisers on the school campus during the school day. Such requests to conduct a fund raiser will be submitted to the [NSP Director] for approval before starting.]

Food and Beverage Marketing in Schools

Any foods and beverages marketed or promoted to students on the school campus during the school day will meet or exceed the nutrition standards for competitive foods set by the USDA.

[The district (i.e., **school nutrition services, athletics department,**) will review existing contracts, new contracts and equipment, and product purchase or replacement to reflect the applicable food and beverage marketing guidelines.]

PHYSICAL ACTIVITY AND PHYSICAL EDUCATION

A quality physical education program is an essential component for all students to learn about and participate in physical activity. The district will develop and assess student performance standards and program minute requirements in order to meet ODE’s physical education content standards and state law.

Physical activity should be included in the school’s daily education program for grades K through 12 and include regular, instructional physical education, as well as co-curricular activities and recess.

In order to ensure students are afforded the opportunity to engage in physical education and physical activity in the school setting, the following goals are established:

1. **{7}**[Physical education will be a course of study that focuses on students’ physical literacy and development of motor skills;
2. **Staff encourages and provides support for parental involvement in their children’s physical education;**

⁶ Oregon Department of Education, Oregon Smart Snacks Standards

⁷ {The goals listed are examples; districts are required to include goals in the policy. Districts are encouraged to evaluate needs and resources and to develop specific goals. Districts are required to “review and consider evidence-based strategies and techniques” (7 CFR 210.31(c)(1)). Model Wellness Policy resource published by the Alliance for a Healthier Generation. OSBA makes no representation of its compliance by providing this resource.}

3. Physical education courses will be the environment where students learn, practice and are assessed on developmentally appropriate knowledge, skills and confidence to become physically literate;
4. Instruction, provided by adequately prepared teachers, i.e., licensed or endorsed to teach physical education, will meet the state adopted academic content standards for physical education (Oregon Revised Statute (ORS) 329.045). Teachers of physical education shall regularly participate in professional development activities annually;
5. {⁸}Every public school student in [pre-]kindergarten through grade 8 shall participate in physical education for the entire school year. Students in kindergarten through grade [5] [6] shall participate for a least 150 minutes during each school week, and students in grades [6] [7] through 8 for at least an average of ~~225~~150 minutes per during each school week, as calculated over the duration of a school year;
6. Physical activity will be integrated across curricula and throughout the school day. Movement will be made a part of all classes or courses as part of a well-rounded education;
7. Physical activity during the school day (including, but not limited to, recess, classroom physical activity breaks or physical education) will not be used as a punishment or a reward;
8. {⁹}At least 50 percent of the weekly physical education class time in grades K through 8 shall be devoted to actual physical activity;
9. Physical activity is a planned part of all school-community events;
10. Materials promoting physical activity are sent home with students and published on the district website.]

[{¹⁰}A student with a disability shall have suitably adapted physical education incorporated as part of their individualized education program (IEP) developed under ORS 343.151. A student who does not have an IEP but has chronic health problems, other disabling conditions or other special needs that preclude them from participating in regular physical education instruction, shall have suitably adapted physical education incorporated as part of their individualized health plan, developed by the district.]

Other Activities that Promote Student Wellness

GET ADMIN INPUT ON THIS

The district will integrate wellness activities throughout the entire school environment (districtwide). The district will coordinate and integrate other initiatives related to physical activity, physical education, nutrition and other wellness components so all efforts are complementary, not duplicated and work toward the same set of goals promoting student well-being, optimal development and strong educational outcomes.

⁸ {Districts are required to provide the specified number of physical education minutes, but are not required to include them as goals or in this policy. If the district operates K-5 elementary schools, select “5” in the first bracket and “6” in the second bracket. If the district operates K-6 elementary schools, select “6” in the first bracket and “7” in the second bracket.}

⁹ {This language is not required to be in policy, but this is a required action pursuant to ORS 329.496.}

¹⁰ {This language is not required to be in policy, but this is a required action pursuant to ORS 329.496.}

The district will provide the following activities and encourage the following practices which promote local wellness:

11. [Scoliosis screenings;
12. Safe Routes to Schools Program;
13. Physically active family and community engagement activities for families to learn about healthy eating or to practice being active together (e.g., skate night, fun run, dance night);
14. Nonfood-related fund raisers;
15. Physical activity energizers during transitions from one subject to another;
16. Intramural sports;
17. Monthly/Weekly school walks;
18. Assemblies which focus on wellness issues such as the importance of breakfast, healthy beverages, and how students and staff can incorporate 60 minutes of physical activity into their day;
19. Use of alternates to food as rewards in the classroom;
20. Creation of connections between out-of-school time (OST) programs that involve staff members from OST programs, both school- and community-based, in school initiatives that address healthy eating, such as school wellness teams or wellness committees;
21. Integration of social, emotional and mental health supports into school programs (e.g., promote a positive school climate where respect is encouraged and students can seek help from trusted adults);
22. Communication between classroom teachers and nutrition staff, so that menus and nutrition promotion can be tied into classroom learning and coursework;
23. Include wellness as a standing agenda item for school-based meetings (e.g., staff meetings, site council meetings, PTO).]

[^{11}Employee Wellness^{12}

The district encourages staff to pursue a healthy lifestyle that contributes to their improved health status, improved morale and a greater personal commitment to the school's overall wellness program. Many actions and conditions that affect the health of staff may also influence the health and learning of students. The physical and mental health of staff is integral to promoting and protecting the health of students and helps foster their academic success. The district's Employee Wellness Program will promote health, reduce risky behaviors of employees and identify and correct conditions in the workplace that can compromise the health of staff, reduce their levels of productivity, impede student success and contribute to escalating health-related costs such as absenteeism.

¹¹ {This language is optional and is not required by state or federal law.}

¹² {CDC resources for school employee wellness and workplace health promotion}

The district will collaborate with community partners to identify programs, services and/or resources to compliment and enrich employee wellness endeavors.

The district's Employee Wellness Program may include the following:

1. Health education and health promoting activities that focus on skill development and lifestyle behavior that change along with awareness building, information dissemination, access to facilities, and are preferably tailored to employees' needs and interests;
2. Safe, supportive social and physical environments including organizational expectations about healthy behavior, and implementation of policy that promotes health and safety and reduces the risk of disease;
3. Linkage to related programs such as employee assistance programs, emergency care and programs that help employees balance work life and family life;
4. Education and resources to help employees make decisions about health care; and
5. Nutrition and fitness educational opportunities that may include but are not limited to, the distribution of educational and informational materials, and the arrangement of presentations and workshops that focus on healthy lifestyles, health assessments, fitness activities and other appropriate nutrition and physical activity related topics.

The district encourages participation from all employees. "Employees" are not limited to instructional staff (i.e., teachers and instructional assistants), but includes all administrators and support staff.

The following groups are seen as essential for establishing, implementing and sustaining an effective employee wellness program:

6. School personnel who implement existing wellness programs in the district (i.e., employee wellness committee);
7. District personnel who implement health programs for students (e.g., school health coordinator, school nurses, psychologist, health and physical educators, nutrition professionals, counselors and other staff); and
8. Decision makers who have the authority to approve policy and provide administrative support essential for a school wellness program (e.g., Board members, superintendents, human resource administrators, fiscal services administrators and principals).]

[DEFINITIONS

ALL REQUIRED BY NSLP

1. "Competitive food" means all food and beverages other than meals reimbursed under programs authorized by the Richard B. Russell National School Lunch Act and the Child Nutrition Act available for sale to students on the school campus during the school day.

2. “Food and beverage marketing”^[13] is defined as advertising and other promotion in schools. Food and beverage marketing often includes an oral, written or graphic statement made for the purpose of promoting the sale of a food or beverage product made by the producer, manufacturer, seller or any other entity with a commercial interest in the product.
3. “Oregon Smart Snacks Standards”¹⁴ means the State’s minimum nutrition standards for competitive foods and beverages (ORS 336.423).
4. “School day” means, for the purpose of competitive food standards implementation, the period from the midnight before, to 30 minutes after the end of the official school day[, i.e., at the conclusion of afternoon student activities, such as athletic, music or drama practices, clubs, academic support and enrichment activities].
5. “School campus” means, for the purpose of competitive food standards implementation, all areas of property under the jurisdiction of the school that are accessible to students during the school day.]

END OF POLICY

Nutrition Guidelines

~~It is the intent of the Board that district schools be proactive in encouraging students to make nutritious food choices. All food and beverage items sold to students in a K-12 public school as part of the regular or extended school day shall meet the minimum state and federal standards. Exceptions to this requirement include items that are part of the USDA National School Lunch Program or School Breakfast Program. Other exceptions are foods and beverages provided in the following instances:~~

- ~~1. When the school is the site of school-related events or events for which parents and other adults are a significant part of an audience; or~~
- ~~2. The sale of food or beverage items before, during or after a sporting event, interscholastic activity, a play, band or choir concert.~~

~~Although the Board believes that the district’s nutrition and food services operation should be financially self-supporting, it recognizes that the nutrition program is an essential educational and support activity. Therefore, budget neutrality or profit generation must not take precedence over the nutrition needs of its students. In compliance with federal law, the district’s NSLP and SBP shall be nonprofit.~~

~~The superintendent is directed to develop administrative regulations to implement this policy that address all food and beverages sold and/or served to students in district schools including provisions for staff~~

¹³ [This term includes, but is not limited to, the following: brand names, trademarks, logos or tags, except when placed on a physically present food or beverage product or its container; displays, such as on vending machine exteriors; corporate brand, logo, name or trademark on school equipment, such as marquee, message boards, scoreboards or backboards (Note: Immediate replacement of these items is not required; however, districts will replace or update scoreboards or other durable equipment when existing contracts are up for renewal or to the extent that is financially possible over time so that items are in compliance.); corporate brand, logo, name or trademark on cups used for beverage dispensing, menu boards, coolers, trash cans and other food service equipment; as well as on posters, book covers, student assignment books or school supplies displayed, distributed, offered or sold by the district; advertisements in school publications or school mailings; free product samples, taste tests or coupons of a product, or free samples displaying advertising of a product.]

¹⁴ Oregon Department of Education, Oregon Smart Snacks Standards

development, family and community involvement and program evaluation. These food and beverage items include competitive foods, snacks and beverages sold from vending machines, school stores and similar food and beverage items from fund-raising activities and refreshments that are made available at school parties, celebrations and meetings.

Physical Activity

The Board realizes that a quality physical education program is an essential component for all students to learn about and participate in physical activity.

Physical activity should be included in a school's daily education program for grades pre-K through 12. Physical activity should include regular instructional physical education as well as co-curricular activities and recess. The district will develop and assess student performance standards in order to meet the Oregon Department of Education's physical education content standards.

Reimbursable School Meals

The district may enter into an agreement with the Oregon Department of Education (ODE) to operate reimbursable school meal programs. The superintendent will develop administrative regulations as necessary to implement this policy and meet the requirements of state and federal law. These guidelines shall not be less restrictive than regulations and guidance issued by the Secretary of Agriculture pursuant to subsections (a) and (b) of section 10 of the Child Nutrition Act (42 U.S.C. 1779) and section 9(f)(1) and 17(a) of the Richard B. Russell National School Lunch Act (42 U.S.C. 1758(f)(1), 1766(a)(0).

School Employee Wellness

The district encourages school staff to pursue a healthy lifestyle that contributes to their improved health status, improved morale and a greater personal commitment to the school's overall wellness program. Many actions and conditions that affect the health of school employees may also influence the health and learning of students. The physical and mental health of school employees is integral to promoting and protecting the health of students and helps foster their academic success. The district's employee wellness program will promote health and reduce risk behaviors of employees and identify and correct conditions in the workplace that can compromise the health of school employees, reduce their levels of productivity, impede student success and contribute to escalating health-related costs such as absenteeism.

The district will work with community partners to identify programs/services and resources to compliment and enrich employee wellness endeavors.

Other School-Based Activities

The district will promote district and community based activities that foster healthy eating and create environments that promote physical activity. Families and the community will be encouraged to provide healthy food choices in all situations where food is served. Educational workshops, screenings and literature related to healthy food choices and physical activity may be offered to families.

Evaluation of the Local Wellness Policy

The Board will involve staff (including but not limited to, physical education and school health professionals), parents, students, representatives of the school food authority, public health professionals, school administrators and the public in the development, implementation and periodic review and yearly update of this policy. The Board shall establish a Wellness Advisory Committee to advise the district in review of the local wellness policy. The policy will be reviewed every year. In an effort to measure the implementation of this policy the Board designates the district principals as the people who will be responsible for ensuring each school meets the goals outlined in this policy. The district will make available to the public annually, an assessment of the implementation, including the extent to which the schools are in compliance with policy, how the policy compares to model policy and a description of the progress being made in attaining the goals of this policy.

END OF POLICY

Legal Reference(s):

[ORS 329.496](#)
[ORS 332.107](#)
[ORS 336.423](#)

[OAR 581-051-0100](#)
[OAR 581-051-0305](#)
[OAR 581-051-0306](#)

[OAR 581-051-0310](#)
[OAR 581-051-0400](#)

SB 4 (2017)

Healthy, Hunger-Free Kids Act of 2010, 42 U.S.C. §1758b.
National School Lunch Program, 7 C.F.R. Part 210.
School Breakfast Program, 7 C.F.R. Part 220.

Cross Reference(s):

EFAA - District Nutrition and Food Services

ASHLAND SCHOOL DISTRICT 5

Code: GBCBA
Adopted:
Revised/Readopted:
Orig. Code(s): GBCBA

Alcohol and Controlled Substance Use

The following conduct is strictly prohibited and will subject an employee to immediate discipline, up to and including termination:

1. The buying, selling, transportation, possession, providing or use of intoxicants, including alcohol or any controlled substances as defined by law, while on district property, during work hours, including meal periods, and while assigned to extra duty or special projects, including those held after or in addition to regular school hours and while driving between worksites during the workday in either a district-supplied vehicle or a vehicle supplied by the employee;
2. Reporting for work, attending any district-sponsored activity, or being present on district property for any reason while under the influence of alcohol, intoxicants or any controlled substance (but excluding any substance lawfully prescribed for the employee's use.) An individual is considered to be "under the influence of alcohol, intoxicants and/or a controlled substance" when, in the district's determination, the controlled substance, alcohol or intoxicant is at a level that may impair the individual's ability to safely and/or efficiently perform assigned work, prevent the employee from presenting a positive role model to students, or cause discredit to the district.

The district reserves the right, with prior notice and reasonable suspicion, to conduct searches of district property, vehicles or equipment at any time. A refusal to submit to a search may result in disciplinary action, up to and including dismissal.

The administration is directed to develop appropriate procedures as needed for the implementation of this policy.

END OF POLICY

Legal Reference(s):

[ORS Chapter 475](#)
[ORS 657.176](#)
[ORS 659.840](#)
[ORS 659A.300](#)

[OAR 581-053-0220\(3\)\(h\)](#)
[OAR 581-053-0230\(9\)\(t\)](#)
[OAR 581-053-0330\(1\)\(n\),\(o\)](#)
[OAR 581-053-0420\(3\)\(c\)](#)
[OAR 581-053-0430\(13\),\(14\)](#)

[OAR 581-053-0531\(12\),\(13\)](#)
[OAR 581-053-0615\(2\)\(c\)\(D\)\(ii\)](#)
[OAR 581-053-0620\(1\)\(s\)](#)
[OAR 584-020-0040](#)
[OAR 839-006-0200 to -0265](#)

Controlled Substances Act, 21 U.S.C. § 812; Schedules of Controlled Substances, 21 C.F.R. §§ 1308.11-1308.15 (2016).
Americans with Disabilities Act of 1990, 42 U.S.C. §§ 12101-12213; 29 C.F.R. Part 1630 (2016); 28 C.F.R. Part 35 (2016).
Americans with Disabilities Act Amendments Act of 2008.

Cross Reference(s):

GBEC - Drug-Free Workplace