Ashland School Board
School Board Regular Session
Thursday, September 10, 2026 6:30 PM

Ashland City Council Chamber
1175 East Main Street
Ashland, OR 97520

Agenda

1. Call to Order and Roll Check

Presenter: Board Chair Russell Hatch

2. Land Acknowledgment

Presenter: Board Chair Russell Hatch

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

Presenter: Board Chair Russell Hatch

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

Presenter: Board Chair Russell Hatch

A. Approval of Minutes **4**

B. Enrollment Report for September **16**

C. Personnel Report for September **17**

D. Board-Superintendent Operating Agreements 2026-27 **18**

E. Superintendent Evaluation Process **20**

F. Policy Review (Second Read/Adoption)

1) Policy KNA Immigration Enforcement on District Property **21**

a. Policy KNA-AR(1) Interactions with Immigration Enforcement **28**

5. Recurring Reports 15 min.

Presenter: Board Chair Russell Hatch

A. OSEA Report

Presenter: OSEA President Steven Essig

B. AEA Report

Presenter: AEA Representative Alan Parowski

C. Student-Board Representative Report

Presenter: Student Board Representatives Toby Pew and Leah Lennett

6. Board Reports 10 min.

Presenter: Board Chair Russell Hatch

7. Superintendent Report 10 min.

Presenter: Superintendent Joseph Hattrick

A. ASD Transformation Update **32**

Presenter: Superintendent Joseph Hattrick

8. 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 Russell Hatch

9. Public Hearing - Exemption from Competitive Bidding Requirements **37**

Presenter: Board Chair Russell Hatch

10. New Business

Presenter: Board Chair Russell Hatch

A. ACTION: Resolution: Alternative Contracting Method **44**

Presenter: Executive Director of Operations, Steve Mitzel

B. ACTION: Recommendation to Award Contract - arkitek: design&architecture **45**

Presenter: Executive Director of Operations, Steve Mitzel

C. ACTION: Initiate Social Sciences Curriculum Adoption Process **48**

Presenter: Assistant Superintendent Michelle Cuddeback

11. Announcements and Appointments

Presenter: Board Chair Russell Hatch

A. The board will hold a work session on Thursday, September 24, 2026, at 6:30 p.m. in the District Office, 885 Siskiyou Blvd., Ashland.

B. The next Regular Session meeting will be held on Thursday, October 8, 2026, in the City Council Chamber, 1175 E. Main St., Ashland.

12. Executive Session

Executive Session is being called under ORS 192.660(2)(e) to conduct deliberations with persons designated by the governing body to negotiate real property transactions.

Presenter: Board Chair Russell Hatch

13. Return to Open Session

Presenter: Board Chair Russell Hatch

14. Adjourn

Presenter: Board Chair Russell Hatch

School Board Regular Session
Thursday, July 9, 2026 6:30 PM

Ashland City Council Chamber
1175 East Main Street
Ashland, OR 97520

Minutes

1. **Call to Order and Roll Check**
Chair Dyson called the meeting to order at 6:32 p.m. and announced that the meeting was being recorded and would become part of the public record. Roll call confirmed the presence of Directors Dyson, Ruby, Ferguson, and Hatch. Director Rooklyn joined the meeting at 6:34 p.m.

2. **Land Acknowledgment**
Chair Dyson read the Land Acknowledgment.

3. **Adoption of Agenda**
- **Motion:** Director Ruby moved, and Director Ferguson seconded adoption of the agenda as presented.
  Aye: Dyson, Ferguson, Hatch, Rooklyn, Ruby
  Nay: none
  Result: The motion carried by unanimous vote of the five members.

4. **Organization of the Board for 2026-27 School Year (Policy BC/BCA)**
4.A. ACTION ITEM: Election of Board Chair (Policy BCB)

- **Motion:** Chair Dyson nominated Director Russell Hatch to serve as Board Chair for the 2026–2027 school year. The nomination was seconded by Director Ferguson.
  Aye: Ferguson, Rooklyn, Ruby, Dyson, Hatch
  Nay: none
  Result: The motion carried by unanimous vote of the five members.

4.B. ACTION ITEM: Election of Board Vice Chair (Policy BCB)

- **Motion:** Director Ruby nominated Rebecca Dyson as Board Vice Chair for the 2026-2027 school year. The nomination was seconded by Director Ferguson.
  Aye: Ferguson, Hatch, Rooklyn, Ruby, Dyson
  Nay: none
  Result: The motion carried by unanimous vote of the five members.

  Following his election as Board Chair, Vice Chair Russell Hatch accepted the gavel from Chair Dyson and presided over the remainder of the meeting.

4.C. ACTION: Resolution No. 2026-2027 B-1 - Annual Designations for 2026-27
Per Policy BC/BCA, the board reviewed and approved the district's designations and authorizations for the 2026-27 school year.

- **Motion:** Director Rooklyn moved to approve Resolution No. 2026-2027 B-1 Annual Designations for the 2026-27 School Year as presented. The motion was seconded by Vice Chair Dyson.
  Aye: Ferguson, Hatch, Rooklyn, Ruby, Dyson
  Nay: none
  Result: The motion carried by unanimous vote of the five members.

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

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Board Chair Hatch noted that Board members had reviewed the consent agenda materials prior to the meeting and indicated his comfort with approving the consent agenda as presented. He reminded the Board that any item could be removed from the consent agenda for separate consideration at the request of a Board member. Board members expressed appreciation to the administration for responding to their questions over the holiday weekend.

- **Motion:** Director Ruby moved, and Director Ferguson seconded adoption of the agenda as presented.
  Aye: Dyson, Ferguson, Hatch, Rooklyn, Ruby
  Nay: none
  Result: The motion carried by unanimous vote of the five members.

5.A. Approval of Minutes
5.B. Personnel Report for July
5.C. Willow Wind- Alternative Education Program Assurances
5.D. Insurance MOU - OSEA Article 12
5.E. 2026-27 Board Meeting Schedule
5.F. 2026-27 Superintendent Professional Development Plan
5.G. Confidential Employees Contract July 1, 2026-June 30, 2029
5.H. Salary Schedule Overview (information only)
  5.H.1) Supervisor/Director Contract July 1, 2026-June 30, 2029
  5.H.2) Administrator Contract July 1, 2026-June 30, 2029
  5.H.3) 2026-27 Executive Director Salary Schedule
5.I. Policy Review (First Read)
  5.I.1) Policy BBAA - Board Member's Authority & Responsibility
  5.I.2) Policy BD - Board Meetings, Notices and Communications
  5.I.3) Policy BDC - Executive Sessions
  5.I.4) Policy BDDC - Board Meeting Agenda
  5.I.5) Policy BDDG - Recordings & Minutes of Board Meetings
  5.I.6) Policy DBEA - Budget Committee
  5.I.7) Policy KL & KL-AR - Public Complaints
5.J. Policy Review (Second Read/Adoption)
  5.J.1) Policy CBG — Evaluation of the Superintendent
  5.J.2) Policy EBB — Integrated Pest Management
  5.J.3) Policy GBA — Equal Employment Opportunity
  5.J.4) Policy GBN/JBA — Sexual Harassment

6. **City of Ashland Planning Department Report**

Linda Reid, Housing Program Specialist, and Brandon Goldman, Community Development Director for the City of Ashland, presented information on the Nonprofit Corporation Low-Income Housing Tax Exemption program and requested the Board's feedback on the District's interest in participating. The program would provide a property tax exemption for qualifying nonprofit-owned affordable rental housing serving households earning 60% or less of the Area Median Income (AMI). Annual applications would be required for participating properties.

City of Ashland staff explained that participation by both the City and the School District is required to meet the 51% threshold needed to implement the exemption. Currently, 42 housing units would qualify, resulting in an estimated annual reduction of approximately $9,000 in property tax revenue to the District. Board members discussed the potential fiscal impact, the relationship between local property taxes and State School Fund revenue, and the potential benefits of encouraging additional affordable housing. Director Rooklyn stated she would abstain from discussion and any future vote because the proposal originated from her employer.

The Board expressed general support for the concept and requested that City staff return with the proposed ordinance, additional fiscal information, and reviewed revenue estimates after the District's Director of Business Services has evaluated the data. City staff anticipate returning to the Board in October or November following City Council direction.

7. **Finance Report**

7.A. Finance Report for the period ending June 30, 2026

Director of Business Services Sherry Ely presented the June 2026 financial report. Revenue exceeded projections due to higher-than-anticipated Education Service District (ESD) flow-through funding, attributed to lower-than-expected use of contracted services. Expenditures remained within budget with no significant concerns reported.

Director Ely reported a projected ending fund balance of approximately $3.5 million, or 8.13% of expenditures, consistent with the beginning fund balance estimate adopted in the 2026–2027 budget. She noted the District is in a strong cash flow position and does not anticipate any cash flow issues before the November property tax distribution. The interim audit is underway, with the annual audit beginning in September. A final 2025–2026 financial report will be presented following completion of the audit.

Board members expressed appreciation for the District's sound fiscal management and recognized staff for ending the fiscal year slightly above the Board's 8% fund balance target.

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8. **Board Reports**
Board members reported participating in the Policy Work Group, the Transformation Steering Committee as observers, and the Ashland Fourth of July Parade. Members shared positive observations about the collaborative nature of the Transformation Steering Committee process and discussed ongoing community efforts related to early childhood education and childcare availability. Appreciation was expressed for opportunities to connect with fellow Board members and engage with the community in support of the District.

9. **Superintendent Report**
Superintendent Hattrick reported on recent activities, including participation in several Coalition of Oregon School Administrators (COSA) workgroups, completion of annual principal and Cabinet evaluations, the Policy Work Group meeting, onboarding of the new Director of Student Services, community engagement events, and attendance at the COSA Summer Conference.

He provided an update on summer facilities projects, highlighting ongoing work across the District, including flooring, paving, boiler replacement, safety and security upgrades, technology improvements, and other maintenance and capital improvement projects.

Superintendent Hattrick also informed the Board that District staff are evaluating the Grizzly Online instructional program after student data indicated low engagement and course completion rates. In accordance with Board Policy IIA, staff are considering piloting an additional online curriculum alongside Edgenuity for the 2026–2027 school year. A presentation outlining the supporting data and proposed pilot will be brought to the Board for consideration at the August meeting.

9.A. ASD Transformation Update
Superintendent Hattrick reported that the Transformation Steering Committee reviewed results from the District's community survey, which received 556 responses representing approximately 20% of District families. Committee members identified key themes and areas for further exploration. Analysis of the feedback indicated broad community support for financially sustainable changes that preserve Ashland's strong educational programs and community values.

The next Transformation Steering Committee meeting is scheduled for Friday, July 17. In response to Board member questions, Superintendent Hattrick noted that the primary method for community members to submit feedback during the transformation process will be through a dedicated ASD Transformation email address, which will be posted on the Transformation webpage on the District's website.

10. **Hear Public Comments** – **None**

11. **Unfinished Business – None**

12. **New Business**
12.A. ACTION: 2026-2029 AEA Collective Bargaining Agreement
Superintendent Hattrick provided an overview of the tentative three-year collective bargaining agreement between the District and the Ashland Education Association (AEA), highlighting key updates related to classroom safety, compensation, health insurance, workload, leave provisions, working conditions, and transfer procedures. The agreement includes a 3% cost-of-living adjustment in each year of the contract. Employees on salary schedule steps 1–18 will also continue to receive annual step increases, making District salaries increasingly competitive with surrounding districts.

Board members thanked both bargaining teams for their collaborative efforts and discussed several provisions of the agreement, including substitute shortages, grade change procedures, and educator caseloads, before proceeding to consider approval of the agreement.

- **Motion:** Vice Chair Dyson moved to approve the 2026-2029 Collective Bargaining Agreement between the Ashland School District and the Ashland Education Association (AEA), as presented. The motion was seconded by Director Ruby.
  Aye: Dyson, Ferguson, Hatch, Rooklyn, Ruby
  Nay: none
  Result: The motion carried by unanimous vote of the five members.

12.B. ACTION: Contract with HMK for the Helman School Seismic Rehabilitation Project

Executive Director of Operations Steve Mitzel reviewed the proposed contract with HMK to provide owner's representative and project management services for the Helman Elementary seismic rehabilitation project. He noted the District recently received a $2.5 million state seismic grant and emphasized HMK's longstanding partnership with the District since 2019, including its role in securing the grant and managing compliance with grant requirements. The contract amount is not to exceed $105,000. Director Mitzel reported that the project will include seismic upgrades and cafeteria renovations, with construction anticipated to occur next summer and the project designed to remain within available grant funding.

- **Motion:** Vice Chair Dyson moved, and Director Ferguson seconded to award the contract for Owner's Representative and Project Management Services for the Helman Elementary School Seismic Rehabilitation Project to HMK.
  Aye: Dyson, Ferguson, Hatch, Rooklyn, Ruby
  Nay: none
  Result: The motion carried by unanimous vote of the five members.

12.C. ACTION: Award Contract with Rogue Boiler Works for AHS Boiler Replacement Project
12.D. ACTION: Award Contract with Custom Crafted Floors, Inc. for AHS Carpet Replacement Project
12.E. ACTION: Award Contract with Bell Hardware for Walker Gym Door Replacement Project
12.F. ACTION: Award Contract with Sentinel Technology, LLC for AMS Fire Alarm Upgrade Project

Executive Director of Operations Steve Mitzel presented four contract awards for summer capital improvement projects funded through remaining bond proceeds, including the Ashland High School boiler replacement, Ashland High School carpet replacement, Walker Elementary School gym door replacement, and Ashland Middle School fire alarm upgrade projects. He explained that the projects were identified during the bond program but deferred due to budget constraints and value engineering. With approximately $3.6 million in unallocated bond funds remaining, the District anticipates spending less than $1 million on this summer's projects. Mr. Mitzel reported that an update on remaining bond funds will be provided following completion of the summer construction season.

- **Motion:** Director Rooklyn moved, and Director Ferguson seconded, to award the contracts for the Ashland High School Boiler Replacement Project (Agenda Item 12.C), Ashland High School Carpet Replacement Project (Agenda Item 12.D), Walker Elementary School Gym Door Replacement Project (Agenda Item 12.E), and Ashland Middle School Fire Alarm Upgrade Project (Agenda Item 12.F), as presented.
  Aye: Dyson, Ferguson, Hatch, Rooklyn, Ruby
  Nay: none
  Result: The motion carried by unanimous vote of the five members.

13. **Announcements and Appointments**

13.A. Board Member Appointments

13.A.1) Superintendent Advisory Committee (Policy Workgroup): **Dan Ruby and Deltra Ferguson**

13.A.2) Superintendent Advisory Liaison to the TSC: **Deltra Ferguson**

13.A.3) Ashland Schools Foundation Board Liaison: **Dan Ruby**

13.A.4) Board Legislative Liaison: **Russell Hatch**

13.B. The board will not hold a Work Session in July.

13.C. The Board will hold its next Regular Session on Thursday, August 13, 2026, at 6:30 PM in the City Council Chamber, 1175 E. Main Street, Ashland, OR.

14. **Adjourn**

There being no further discussion, Chair Hatch adjourned the meeting at 7:46 p.m.

Submitted by:
Holly Rosser, Board Secretary

Date for Board Approval: September 10, 2026

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School Board Retreat Day 1
Tuesday, August 18, 2026

District Office
885 Siskiyou Blvd
Ashland, Oregon 97520

Minutes

1. Call to Order / Roll Check

Chair Hatch called the meeting to order at 9:11 AM. All five members were present: Directors Dyson, Ruby, Ferguson, Rooklyn and Hatch.

2. Review and Approve Agenda

- **Motion:** Director Rooklyn moved, and Director Ruby seconded, to approve the agenda as presented.
  Aye: Dyson, Ferguson, Hatch, Rooklyn, Ruby
  Nay: none
  Result: The motion carried by unanimous vote of the five members.

3. ASD Academic Review and Goals

3.A. Senate Bill 141, the Accountability Act

Assistant Superintendent Michelle Cuddeback presented an overview of Senate Bill 141, the Accountability Act, and its new performance growth target and reporting requirements. The accountability framework includes seven statewide metrics: K–2 regular attendance, K–12 regular attendance, third-grade ELA proficiency, eighth-grade math proficiency, ninth-grade on-track status, four-year graduation, and five-year completion. Districts must also select a local metric; Ashland is proposing postsecondary readiness, based on student participation and achievement in dual credit and Advanced Placement opportunities.

Ms. Cuddeback explained that the District's local performance growth targets (LPGTs) are being developed using historical performance, statewide targets, performance of similar districts, focal-group achievement gaps, and local context and capacity. The goal is to establish targets that are rigorous but attainable. The District worked with ODE and Southern Oregon ESD to develop and refine the targets, which will establish three years of expected progress.

Ms. Cuddeback reviewed the accountability provisions associated with the targets. Failure to meet an individual metric in consecutive years can result in escalating state intervention, beginning with directed coaching, followed by intensive coaching, and, after continued failure to meet the same target, state direction over the use of a portion of district funding. A metric is considered met when both the baseline and gap-closing targets are achieved, or when one target is achieved and progress is being made toward the other.

The Board and staff discussed strategies for improving outcomes, including expanded attendance outreach and family education, school-based attendance incentives, engaging instruction, targeted academic interventions, and learning from comparable districts demonstrating stronger rates of improvement. Staff emphasized that students' sense that school is meaningful and engaging will be important to improving attendance and outcomes. The District will also use iReady diagnostic data to identify student needs and monitor academic growth.

New reporting requirements include presenting K–8 math and reading benchmark results to the Board in an open meeting following the fall, winter, and spring assessment windows, as well as publicly tracking progress toward the performance growth targets. The District will continue its required annual Integrated Guidance report to the Board regarding outcomes, expenditures, and actions supported by those funds.

Board discussion acknowledged the significant staff time required to implement the new accountability system and the importance of keeping the identified priorities at the forefront of work at each school, while recognizing that concentrating resources and staff capacity on these measures may affect the District's ability to address other needs.ds.

3.B. AI in education

Executive Director of Operations Steve Mitzel shared an update on the growing use of artificial intelligence in K–12 education and the importance of approaching it thoughtfully. He reviewed Oregon’s emphasis on keeping people and relationships at the center, protecting student information, supporting equitable access, and preparing staff and students to use AI responsibly.

Ashland’s next steps include continuing to review policies and tools, providing professional learning for staff, exploring useful applications of AI, and considering a district task force to help guide future decisions.

Board discussion emphasized moving forward carefully and keeping student learning, critical thinking, privacy, equity, and the role of educators at the center of decision-making.

4. Board Self-Evaluation Summary of Results

The Board reviewed and discussed the results of the 2025-26 School Board Self-Evaluation, working through each of the 12 governance standards and reflecting on areas of strength and opportunities for continued growth. Overall strengths included ethical conduct, mutual trust and a productive Board-Superintendent relationship, financial oversight, a respectful and collaborative Board culture, commitment to Board learning, community involvement, and support for the District's transformation work.

Discussion of opportunities for growth focused on developing a clearer long-term vision and shared values following the transformation process; strengthening and coordinating community engagement; becoming more intentional and informed in the Board's use of data; continuing learning around culturally responsive governance; supporting staff professional development while maintaining appropriate boundaries between governance and operations; and continuing to clarify Board and Superintendent roles.

Board members discussed using the outcomes of the transformation process to help inform future values, priorities, and long-term vision, and emphasized that data should inform—but not solely drive—district decisions. The Board also identified opportunities for more coordinated community outreach and additional Board learning.
For future self-evaluations, the Board requested that the standard indicators be included in the summary report and that individual responses be presented in a randomized order.

5. Lunch Break (Recess)

Chair Hatch called for a recess at 12:30 p.m. At 1:15 pm, Chair Hatch called the meeting back to order.

6. Board Operations

Superintendent Hattrick and the Board reviewed the 2025–26 operating agreements, including collaborative governance, communication protocols, collective commitments, and mutual expectations, and discussed revisions for 2026–27. Board members expressed support for the Superintendent's weekly updates and discussed adding an expectation that Board members make difficult decisions and serve as ambassadors for those decisions.

6.A. Communications and records requests

The Board reviewed communication practices and public records responsibilities, including the importance of conducting Board business through appropriate channels, maintaining professional communications, and understanding that communications related to Board business may be subject to public records requirements.

6.B. Board review of policy BBAA- Board Roles and Responsibilities

The Board reviewed Policy BBAA and discussed Board roles, appropriate responses to questions and concerns from community members, and maintaining clear boundaries between governance and district operations.

6.C. School Presentation at Board Meetings- review

The Board reviewed the format and purpose of school presentations at Board meetings. For 2026–27 presentations, the Board requested that principals report back on progress and outcomes related to the school improvement goals presented the previous year, in addition to sharing current-year goals and priorities. The Board also discussed opportunities to hear from students and stay connected with schools while respecting the Board's governance role.

7. District Goals- Tabled

8. Other

8.A. Transformation Steering Committee Update

Superintendent Hattrick reviewed the Transformation Steering Committee process to date, including community survey input, development of guiding principles, and the current phase of scenario development. The Lead Team is developing up to three scenarios for the TSC to evaluate before broader community engagement begins this fall.

Board discussion emphasized communicating that the transformation process is focused on long-term sustainability, aligning resources with enrollment, and improving opportunities for students rather than addressing only a short-term budget issue.

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Upcoming engagement will include site-based community sessions and additional opportunities for feedback before a recommendation is brought to the Board.

9. **Adjourn**

There being no further discussion, Chair Hatch adjourned the meeting at 3:01 pm.

Submitted by: Holly Rosser, Board Secretary Date for board approval: September 10, 2026

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School Board Retreat Day 2
Wednesday, August 19, 2026

District Office
885 Siskiyou Blvd.
Ashland, OR 97520

Minutes

1. **Call to Order / Roll Check**
   Chair Hatch called the meeting to order at 12:09 PM. Roll call confirmed that four of five members were present: Directors Dyson, Ruby, Ferguson, and Hatch. Director Rooklyn was absent.

2. **Review and Approve Agenda Presented**
   Supt Hattrick requested that District Goals be added to the end of the agenda.

   - **Motion:** Director Ruby moved, and Director Ferguson seconded, to approve the agenda with the addition of District Goals added to the end of the agenda.
     Aye: Dyson, Ferguson, Hatch, Ruby
     Nay: none
     Result: The motion carried by unanimous vote.

3. **State of the District – 2026-27 District Vision**
   Superintendent Hattrick shared a vision for 2026–27 centered on moving from stability to student success. The year's succinct vision is: "Every student is known, engaged, growing, and prepared for what comes next." District work will be organized around four commitments: every student grows, every student belongs, every student is prepared, and the system sustains the mission. He emphasized that SB 141 provides a way to measure progress but should serve as the "scoreboard, not the strategy."

   Superintendent Hattrick described the District's progression from stabilizing in 2024–25, to aligning systems with reality in 2025–26, to transforming in 2026–27 by using that stronger foundation to improve student outcomes and opportunities. Board discussion emphasized evaluating both what has changed for students because the system changed and what still needs to change.

   The Board also discussed transformation as an ongoing, adaptive process rather than a one-time project. Long-range planning is generally focused on the experience of today's kindergarten students over approximately the next 10 years, while maintaining flexibility to adjust as enrollment, community needs, and other conditions change.

4. **Budget Update**
   Director of Business Services Sherry Ely provided an update on the State School Fund and other district revenues. The District's June State School Fund estimate is approximately $234,000 below the amount budgeted, due in part to changes in special education funding calculations and statewide adjustments used in the funding formula. Ely emphasized that State School Fund estimates fluctuate throughout the year as enrollment, property tax collections, and other statewide factors change.

   Positive revenue adjustments include approximately $120,000 more in Student Investment Account funding, $100,000 more in Early Literacy funding, and $100,000 in Title I carryover. The District is also monitoring potential changes to future PERS rates and continued legislative discussion about increasing the 11% special education funding cap. Final insurance runout costs associated with the transition to OEBB are not yet available.

   Board discussion included questions about special education and focal student counts and how state calculations affect both funding and accountability measures. Staff will continue seeking clarification as those calculations and requirements are refined.

5. **Board Training**
   The Board participated in training on the BoardBook platform, including how to access meeting materials and use the platform during Board meetings. The Board also reviewed best practices for making motions,

emphasizing the importance of stating the full motion rather than using "so moved" to ensure clarity in Board action and the official record.

6. **Policy Review**
   The Board reviewed revisions to Policy KL – Public Complaints and the District's chain of command for addressing complaints. Discussion focused on significant changes to the appeal process, including the role of the Board Chair and Vice Chair in determining whether an appeal will be heard by the Board and the process to be followed when an appeal is accepted for Board review.

   The Board also reviewed new Policy KNA – Immigration Enforcement on District Property, which is required to be adopted by September 30, 2026. The policy will be presented for further review at the August 27 Work Session.

   - At 2:18 pm, Director Ruby moved that the Board stand at ease. Vice Chair Dyson seconded the motion. The motion passed unanimously. At 2:23 pm, Chair Hatch called the meeting back to order.

7. **Legislative Updates**
   The Board discussed opportunities for legislative advocacy, including building relationships with legislators and distinguishing between individual advocacy and positions formally adopted by the Board. Members also reviewed upcoming OSBA professional learning and regional meeting opportunities.

8. **District Goals**
   The Board reviewed its 2025–26 goals of Informed Decision Making, Building Trust, and Advancing Financial Growth and Sustainability, including progress on associated action items. The Board discussed focusing future goals on desired outcomes rather than specific activities. The Lead Team will develop 2026–27 District goals aligned with the District's vision and academic priorities. These will be reviewed at the September Work Session, when the Board will also develop its goals. District, Board, and Superintendent goals will ultimately be aligned and presented at a regular Board meeting.

9. **Superintendent Evaluation Process**
   The Board reviewed the proposed 2026–27 Superintendent evaluation timeline and process. Members supported continuing with the existing evaluation tool and agreed that a 360-degree survey is not necessary this year. A final evaluation timeline and process will be brought forward for Board approval in September.

10. **Other- None**

11. **Adjourn**
    There being no further discussion, Chair Hatch adjourned the meeting at 3:38 pm.

Submitted by: Holly Rosser, Board Secretary Date for board approval: September 10, 2026

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School Board Work Session
Thursday, August 27, 2026 6:30 PM

District Office 885 Siskiyou Blvd
Ashland, Oregon 97520

Minutes

1. Call to Order / Roll Check

Chair Hatch called the meeting to order at 6:30 p.m. and announced that the meeting was being recorded and would become part of the public record. All five members were present: Directors Dyson, Ruby, Ferguson, Rooklyn, and Hatch.

2. Adoption or Adjustment of Agenda

- **Motion:** Director Rooklyn moved, and Director Ruby seconded, to adopt the agenda as presented.
  Aye: Dyson, Ferguson, Hatch, Rooklyn, Ruby
  Nay: none
  Result: The motion carried by unanimous vote of the five members.

3. Consent Agenda

Board members reviewed the consent agenda materials prior to the meeting and were provided the opportunity to remove any item for separate discussion and consideration before approval.

- **Motion:** Director Ferguson moved, and Director Ruby seconded, to accept the consent agenda as included in the meeting materials.
  Aye: Dyson, Ferguson, Hatch, Rooklyn, Ruby
  Nay: none
  Result: The motion carried by unanimous vote of the five members.

3.A. Personnel Report for August
3.B. Policy Review (First Read)
  3.B.1) Policy KNA Immigration Enforcement on District Property
    3.B.1)a. Policy KNA-AR(1) Interactions with Immigration Enforcement
    3.B.1)b. Policy KNA-AR(2) Federal Immigration Enforcement Request Log
3.C. Policy Review (Second Read/Adoption)
  3.C.1) Policy BBAA - Board Member's Authority & Responsibility
  3.C.2) Policy BD - Board Meetings, Notices and Communications
  3.C.3) Policy BDC - Executive Sessions
  3.C.4) Policy BDDC - Board Meeting Agenda
  3.C.5) Policy BDDG - Recordings & Minutes of Board Meetings
  3.C.6) Policy DBEA - Budget Committee
  3.C.7) Policy KL & KL-AR - Public Complaints

4. Integrated Guidance Report

Ericka Beck-Brattin presented the 2025–26 Integrated Guidance Application Annual Report, highlighting district investments in academic support, attendance and family engagement, student wellness, and postsecondary readiness. She reported that 97.5% of ninth-grade students were on track to graduate and highlighted high-dosage tutoring and literacy supports, expanded counseling and student support systems, dual credit and CTE pathways, and college and career advising. FAFSA completion reached 91%. The report also noted increased access to mental health services, strengthened family engagement, improved communication with multilingual families, and expanded opportunities for student voice and leadership.

Attendance remains a district priority, with a focus on early identification, coordinated response, and targeted interventions. Board discussion included the value of better understanding structural and motivational barriers to attendance and using data to inform interventions.

Priorities for 2026–27 include strengthening attendance systems and consistency in data review and progress monitoring across schools; expanding capacity for tutoring and targeted interventions; providing professional learning in mathematics, literacy, intervention services, and data analysis; dedicating staff collaboration time to attendance planning and intervention monitoring; aligning intervention and attendance supports districtwide; and continuing investments in instructional coaching, intervention resources, and family engagement.

5. Finance Report

5.A. Finance Report for the period ending July 31, 2026

Director of Business Services Sherry Ely provided an update on district revenue, expenditures, cash flow, and the

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projected Ending Fund Balance. The second ODE State School Fund estimate for 2026–27 was approximately $225,000 lower than the estimate used in developing the budget, with additional estimates and fluctuations expected throughout the year. Some special revenue sources came in above budgeted amounts, including SIA, Early Literacy, and High School Success funding.

Expenditures in the 600 object category are currently higher than projected, primarily due to increases in property, liability, and other insurance premiums. The District will continue monitoring insurance costs and claims as it transitions to OEBB, as well as workers' compensation claims, which affect the District's experience rating and premiums. Financial projections will become clearer following September payroll, the District's largest expenditure area.

The Ending Fund Balance is currently projected at approximately $2.956 million, or 7.38%**,** compared with the budgeted Ending Fund Balance of $2.24 million. Cash flow remains stable, with no significant concerns identified at this time.

6. **Grizzly Online Program Review**

AHS Principal Francisco Atanes and Assistant Principal Becca Laroi presented data and rationale for piloting Edmentum as the platform for the Grizz Online program, replacing Edgenuity, which the District has used for seven years. Staff identified challenges with Edgenuity related to usability, support coordination, accessibility and flexibility for diverse learners, and the amount of staff time required to assist students and families with the platform.

Grizz Online serves approximately 40–50 students over the course of a year. In 2025–26, the program had a 74% course achievement rate, with 26% of courses resulting in failed, dropped, or incomplete credits. The achievement rate for the IDEA focal group was 67%. Staff emphasized the need to improve online student success and graduation outcomes and reduce achievement gaps for students receiving special education services. Edmentum was recommended because it better aligns with the District's credit-recovery system and on-campus course offerings, supports semester-based scheduling, and provides more varied and flexible learning formats, including reading, video, interactive materials, and projects. The Board also discussed the potential for a stronger online program to retain or attract students who need an alternative to in-person instruction while allowing them continued access to AHS classes, extracurricular activities, counseling, and other district supports.

AHS will pilot Edmentum for one year and report back on student outcomes at the end of the year. If the new platform does not better meet student needs, a full curriculum review and adoption process will be considered.

7. **Board Reports**

Board members reported on recent district and community activities, including the Board retreat, back-to-school welcome breakfast, OSBA PRIDE Advisory Committee, Transformation Subcommittee meetings, Rotary student exchanges, and the Summer Learning Showcase. Members shared positive feedback about summer learning programs and expressed enthusiasm for the start of the school year and upcoming fall activities and athletics.

Board members also reflected on opportunities to connect with staff, students, and the broader Ashland community and emphasized the importance of remaining informed about student programs, services, and experiences throughout the schools.

8. **Superintendent Report**

Superintendent Hattrick reflected positively on the Board retreat, staff welcome-back event, and summer learning program. He also reported on participation in the OSBA PRIDE Advisory Committee, Oregon Association of School Executives (OASE) meeting, Rotary exchange student presentation, and Ashland Schools Foundation meeting.

Superintendent Hattrick reported that the District finalized its longitudinal growth performance targets in collaboration with ODE and will submit them to the state. He also shared that a district newsletter is being prepared to communicate the District's vision and priorities, including accountability and student outcomes, leadership updates, attendance, immigration policy, and a message emphasizing dignity, belonging, and that all are welcome in Ashland schools.

8.A. ASD Transformation Update

Superintendent Hattrick reported that transformation planning continues. The Lead Team is reviewing data and input from the Transformation Steering Committee and using that information to develop potential scenarios. The Lead Team will continue this work during an additional three-hour planning session in preparation for the September 2 Transformation Steering Committee meeting.

Board Retreat Follow-up

Board members reflected positively on the recent retreat and expressed appreciation to staff for making time for the Board to engage in focused work together.

9. **Announcements**

9.A. The next Regular Session meeting will be held on Thursday, September 10, 2026, in the City Council Chamber, 1175 E. Main St., Ashland.

10. **Adjourn**

There being no further discussion, Chair Hatch adjourned the meeting at 7:44 p.m.

Submitted by:
Holly Rosser, Board Secretary

Date for Board Approval: September 10, 2026

DRAFT

ASHLAND PUBLIC SCHOOLS ENROLLMENT SUMMARY

September 2026 Full-Time Enrollment Counts by Site and Grade

SITE	K	1	2	3	4	5	6	7	8	9	10	11	12		
BELLVIEW	32	30	46	39	41	50								238	**BELLVIEW**
HELMAN	33	37	33	45	46	47								241	**HELMAN**
WALKER	34	29	37	45	47	34								226	**WALKER**
TRAILS	11	12	13	12	11	15	14	15	10					113	**TRAILS**
***Ashland CONNECT**	0	0	0	4	0	2	1	1	4					12	**CONNECT**
AMS							137	144	186					467	**AMS**
AHS										222	242	211	190	865	**AHS**
WILLOW WIND	20	22	23	23	24	25	25	23	24					209	**WILLOW**
ASD TOTALS	**130**	**130**	**152**	**168**	**169**	**173**	**177**	**183**	**224**	**222**	**242**	**211**	**190**	**2371**	**TOTAL**

	Full-Time Enrollment History (Fiscal Year)														
	2012	**2015**	**2016**	**2017**	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**	**2025**	**2026**	**2027**	
BELLVIEW		315	322	325	315	318	263	256	246	258	254	247	242	238	**BELLVIEW**
HELMAN		303	314	351	345	345	286	286	281	315	302	265	263	241	**HELMAN**
WALKER		299	342	343	337	344	275	277	226	221	241	241	217	226	**WALKER**
TRAILS		100	120	122	123	122	105	107	180	135	139	139	114	113	**TRAILS**
AMS		579	562	565	564	517	485	480	461	527	529	510	466	467	**AMS**
AHS		971	996	971	950	940	942	914	934	888	822	815	833	865	**AHS**
WILLOW		195	192	179	178	180	159	150	150	163	179	194	205	209	**WILLOW**
Ashland Connect		0	0	0	0	0	0	0	0	24	24	27	19	12	**CONNECT**
Level 2 Program												5	5	N/A	**L2P**
ASD TOTALS		**2762**	**2848**	**2856**	**2812**	**2766**	**2515**	**2470**	**2478**	**2531**	**2490**	**2443**	**2364**	**2371**	**ASD TOTALS**

	Monthly Enrollment									
	Sept	**Oct**	**Nov**	**Dec**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**June**
2026-2027	**2371**									
2025-2026	**2446**	**2425**	**2405**	**2399**	**2396**	**2392**	**2381**	**2379**	**2374**	**2364**
2024-2025	**2512**	**2507**	**2479**	**2468**	**2470**	**2472**	**2469**	**2457**	**2451**	**2443**
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**	**2478**
2020-2021			**2530**	**2515**	**2509**	**2505**	**2490**	**2491**	**2486**	**2470**
2019-2020		**2835**	**2825**	**2820**	**2804**	**2797**	**2781**	**2774**	**2763**	**2515**
2018-2019		**2897**	**2894**	**2881**	**2860**	**2846**	**2830**	**2842**	**2824**	**2766**
2017-2018	**2935**	**2922**	**2913**	**2912**	**2905**	**2897**	**2892**	**2878**	**2869**	**2812**
2016-2017	**2898**	**2897**	**2901**	**2929**	**2879**	**2864**	**2847**	**2845**	**2826**	**2856**
2015-2016	**2856**	**2852**	**2845**	**2875**	**2815**	**2814**	**2796**	**2793**	**2779**	**2848**

NOTES:

1. We no longer have a standalone site-based Level 2 Program; students have been incorporated into their grade-level-appropriate classes at AMS and AHS.
2. Part-time homeschooled students are reported semi-annually in Dec. and June.

Ashland School District
Board Personnel Report
September 1, 2026

SITE	NAME	POSITION	STATUS	STATUS CHANGE	SALARY PLACEMENT EXCEPTION
AHS	Neil Holland	Cross Country Head Coach	Temporary Services	NO	NONE
AHS	Audrey Renee Bowley	Peer to Peer Mentor- Kacy Curtis	Temporary Services	NO	NONE
AHS	Juan Gabriel Guerrero Vazquez	Assistant Coach, Girls Soccer	Temporary Services	NO	NONE
AHS	Nathaniel Eden Reay	Youth Advocate	Temporary Services	NO	NONE
AHS	Kelly Anderson	Grizz Academy	0.17 FTE, Temporary	NO	NONE
AHS	Gideon Weisberg	EA-Site Based	Resigned	NO	NONE
AHS	Laura Tagg	Counselor	1.0 FTE	correction to August report	NONE
AMS	Tara Elder-Hammond	Volleyball Coach (2 teams)	Temporary Services	NO	NONE
AMS	Jarrett Rex Davidson	Cross Country Coach	Temporary Services	NO	NONE
AMS	Gideon Weisberg	EA-Site Based	0.75 FTE	NO	NONE
Helman	Derek Snyder	EA-SPED I	0.75 FTE	NO	NONE
Walker	Regina Palmesano	Teacher, Grade 2	1.0 FTE	NO	NONE
Walker	Hazel Beauchamp	EA	0.8438 FTE	NO	NONE
Walker	Maizi Giroux	EA-SPED I	0.75 FTE	NO	NONE
Walker	Karl Moeglein	EA	0.5625 FTE	NO	NONE
Maintenance	Benjamin Fox	AHS Asst Head Custodian	Resigned	NO	NONE
Maintenance	Benjamin Fox	Maintenace Worker I	1.0 FTE	NO	NONE
Maintenance	Todd Luke	Maintenace Worker II	Resigned	NO	NONE
Technology	Shahid Ali	Network Transition Support	Temporary Services	NO	NONE
Technology	Todd Luke	IT Support Specialist II	1.0 FTE	NO	NONE
TRAILS	Rebecca Addison	SPED/Math Intervention Teacher	1.0 FTE	NO	NONE
TRAILS	Derek Snyder	EA	Resigned	NO	NONE
Willow Wind	Tegan Kelley	Part Time Instructor	Temporary Services	NO	NONE

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. Members of the Board and the Superintendent shall mutually respect the others' role in policy/governance and in managing the school district and to direct employees in district and school matters, respectively.
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 concerns about agenda items.
3. When a Board member and/or the Superintendent has an individual concern, they shall communicate one-on-one with any member of the board-superintendent team as appropriate starting at the lowest possible level at the earliest opportunity. Concerns should be escalated to the board chair and/or OSBA for support if not resolved.
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.

Agreed Upon Communication Protocol:

1. Communication between board members and superintendent will be respectful, timely, honest, direct, and appropriate.
2. Superintendent will communicate to board members regularly through weekly emailed reports when one has not been presented in-person during the same week and through in-person monthly meetings (1:1 or 2:1).
3. Board members should contact superintendent with questions or when topics come up through email, text, or phone. If urgent, text before a cold call to ensure availability. When possible, limit calls/texts to M-F 7AM-8PM.
4. In an emergency the superintendent will limit communication to the Board Chair who will communicate with the board. Detailed communication will follow the incident.
5. The board will use text communication for logistical and informational purposes only and should exercise caution.

Collective Commitments to:

1. Respectful interactions.
2. Learning together.
3. The understanding that we are all human, we WILL make mistakes, should welcome feedback when we do, and use feedback to grow.
4. Filter decisions through the lens of vision, mission, and what is in the best interests of our students.
5. Avoid surprises at board meetings and in board business.
6. Having fun.

2026-2027 Board Expectations of the Superintendent:

1. Provide data to the board members so that data-informed 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.

2026-2027 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. Arrive at board meeting fully prepared to conduct district business.
5. Willingness to abide by its own rules, policies and code of ethical conduct.
6. Make difficult decisions and commit to share information when appropriate.

Approved by the board on September 10, 2026.

2026-27 Superintendent Evaluation Process
(Dates subject to change)

- Evaluation process approved by the board on September 10, 2026.
- 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].
- Check-in meetings to review the performance of the superintendent (in executive session per ORS 192.660(2)(h)).
    - November 19, 2026
    - January 14, 2027
    - March 11, 2027
- Superintendent will present self-evaluation/goals update in executive session on April 8, 2027.
- Board reviews all information provided during the April executive session.
- Board members complete the superintendent evaluation independently and meet in executive session on May 13, 2027 to finalize the evaluation.
- Board (or subcommittee) meets with Superintendent in Executive session or (if subcommittee) at a time convenient for all parties to provide the summary evaluation and constructive feedback.
- Board adopts a short narrative in open session on June 10, 2027 (step 5) and, at the same meeting, determines if the board would like to extend the Superintendent's contract one year per contract.

References:

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.
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.

Board Policy CBG – Evaluation of the Superintendent

~~OSBA Model Sample Policy~~
Ashland School District

Code: KNA
Adopted: date

Immigration Enforcement on District Property

{House Bill 4079 (2026) requires districts to "adopt a policy for providing notice when a federal immigration authority is confirmed to have entered school property for immigration enforcement." This policy must be "consistent with applicable model policies published by the Attorney General as provided by ORS 180.810."}

The district complies with state and federal law, including Oregon Revised Statute (ORS) 180.805, ~~and~~ ORS 181.826, ~~and~~ this policy, and accompanying administrative regulations KNA-AR(1) – Interactions with Immigration Enforcement and KNA-AR(2) – Federal Immigration Enforcement Request Log when responding to requests from federal immigration authorities regarding immigration enforcement. ~~[~~Absent a judicially authorized subpoena, warrant or court order, district staff must not allow federal immigration authorities access to the district's records or facilities not open to the public for the purposes of immigration enforcement and must verify the validity of any subpoena, warrant or court order involving immigration enforcement presented to them by federal immigration authorities to ensure it is judicially authorized. Examples of judicial and administrative warrants and subpoenas can be found in the Oregon Attorney General's Model Public School Policies.[1] The superintendent or designee must review and approve any response to a request involving immigration enforcement. The district will provide ongoing training to designated staff to ensure compliance with this policy.~~]~~

This policy will be made available in the student handbook and on the district's website[2]. ~~[~~The district will ensure a copy of the Oregon Attorney General's Model Public School Policies[3] and this policy and accompanying administrative regulations are provided to staff.~~]~~

Designation of Primary Point of Contact

The ~~[position~~ Superintendent ~~{[4]}]~~ is the primary point of contact for coordinating interactions with federal immigration authorities occurring in the district ("immigration liaison" ~~{[5]}~~). The ~~[alternate position~~ Assistant Superintendent or Executive Director of Operations~~]~~ shall serve as an alternative point of contact during the immigration liaison's absence or unavailability ("alternate immigration liaison").

[1] https://www.doj.state.or.us/wp-content/uploads/2026/06/Attorney-Generals-Model-Public-School-Policies-in-Compliance-with-SB-1538.pdf

[2] Must be provided in culturally appropriate languages that are used to communicate effectively with parents and guardians of students in the district, as determined by the Board. {The district is encouraged to evaluate language needs in the district in order to effectively communicate with all parents and guardians.}

[3] https://www.doj.state.or.us/wp-content/uploads/2026/06/Attorney-Generals-Model-Public-School-Policies-in-Compliance-with-SB-1538.pdf

~~[4] {House Bill 4079 (2026) requires the policy to "identify at least one administrator" for this purpose. The Board should consider whether a single administrator is sufficient for the district, or whether multiple administrators should be designated.}~~

~~[5] {The district can choose any title to use for this individual and should use it throughout this policy.}~~

PROPOSED

The immigration liaison's responsibilities include:

1. Serving as the district's representative during encounters with federal immigration authorities;

2. Confirming when federal immigration authorities have entered school property for immigration enforcement purposes;

3. Ensuring federal immigration authorities engaging in enforcement activities at the district have notice of relevant district policies: JO/IGBAB – Education Records/Records of Students with Disabilities, JOA – Directory Information, JOB – Personally Identifiable Information and this policy;

4. Assisting staff in performing their duties in response to immigration enforcement efforts, including ensuring compliance with all district policies and procedures related to interactions with federal immigration authorities and immigration enforcement efforts;

5. Reviewing and responding to requests from federal immigration authorities, in coordination with, and under the direction of, the superintendent or designee;

6. Facilitating the district's compliance with lawful immigration enforcement efforts in a manner that does not unnecessarily disrupt the school environment or invade the privacy of students, staff, or volunteers;

7. Providing notice as required in this policy when a federal immigration authority has been confirmed to have entered school property for immigration enforcement.

Required Notice

When a federal immigration authority is reported to have entered school property for the purpose of immigration enforcement the immigration liaison shall confirm whether federal immigration authorities have entered school property for immigration enforcement and when confirmed, shall provide notice as follows:

1. Notice must be provided to:

    a. Students who attend the school where the federal immigration authority is confirmed to be on school property for immigration enforcement and who are in grades [7] and above;
    b. Parents or guardians of students attending the school where the federal immigration authority is confirmed to be on school property for immigration enforcement;
    c. Staff of the school where the federal immigration authority is confirmed to be on school property for immigration enforcement; and
    d. Community-based service providers that have requested to receive notice when a federal immigration authority is confirmed to be on school property for immigration enforcement. Community-based service providers can request to receive such notifications by contacting ~~[the immigration liaison at the district office~~, the Superintendent's Office, through the Executive Assistant to the Superintendent~~]~~.

2. Notice must include:

    a. The general location of the federal immigration authority; and

b. Whether classes or school operations were affected by the presence of the federal immigration authority. ~~[{Districts may include resources available to those impacted by immigration enforcement actions.}]~~

3. Notice must not disclose:

a. Personally identifiable information;
b. Other information that may not be legally disclosed; or
c. Other information when the disclosure may threaten the health or safety of students or staff of the district or is prohibited by a court order.

The required notice will be provided as expediently as possible using ~~[insert communication methods the district will use] [existing methods used for providing electronic communications~~ email and ASD's electronic communication system~~]~~.

Unless otherwise prohibited by law or court order, the district will make reasonable efforts to provide notice to a student, or to the parent ~~of~~ or guardian of a student, when the district has provided information related to the student to a federal immigration authority.

~~[~~**Confidentiality of School Records**

Except when required by a judicially authorized warrant, subpoena, or order, Oregon law prohibits the district from disclosing protected information to federal immigration authorities for the purpose of enforcing federal immigration laws. Protected information includes information relating to a person's:

1. Address;

2. Workplace or hours of work;

3. School or school hours;

4. Contact information, including telephone number, electronic mail address or social media account information;

5. Known associates or relatives; and

6. Date, time or location of the person's hearings, proceedings or appointments with a public body that are not matters of public record.

Oregon law also prohibits sharing any of the above information about a person's relatives or known associates with federal authorities for immigration enforcement purposes.

Oregon law generally prohibits the district from sharing or disclosing citizenship or immigration status or country of birth information[6] that the district collects, unless one of the following exceptions applies:

[6] Citizenship or immigration status or country of birth information is any information concerning:
1. Where a person was born; or
2. Whether a person is a citizen of the United States; or
3. Whether a person has lawful authority to be present in the United States.

1. The disclosure is required by state or federal law (other than federal immigration law);

2. The disclosure is required by a judicially authorized warrant, order, or subpoena;

3. The information being shared with a person concerns only that person or their dependents; or

4. The information is aggregated and not personally identifiable.

In addition to the prohibitions described above, federal and state laws make records and information related to students confidential and permit disclosure only in limited circumstances. The district's policies with respect to student records can be found in Board policies JO/IGBAB – Education Records/Records of Students with Disabilities, JOA – Directory Information and JOB – Personally Identifiable Information. To ensure compliance with applicable federal and state law, the district's staff shall not disclose any school records or information to federal immigration authorities except as provided in these policies.

Staff must also maintain the confidentiality of school records and other information about students, staff, and volunteers when communicating with other students, parents, or community members about immigration enforcement activities involving students, staff, or volunteers of the district or occurring on district property. Staff should direct anyone with questions about immigration enforcement activities occurring on district property to the immigration liaison.~~]~~

Training

The district will provide the immigration liaison and alternate immigration liaison with training as follows:

1. The training must include information on the requirements of House Bill 4079 (2026), any applicable model policies published by the Attorney General, and this policy; and

2. The training must be provided at the time of designation and at least once every two years thereafter.

~~[~~{[7]}Upon the adoption of this policy and not less than once every two years thereafter, the district will provide training to all current district staff of one hour or more regarding federal and state laws, and the district's policies, relating to interacting with federal immigration authorities and responding to immigration enforcement efforts. The district will provide the required training to all new staff within 30 days of beginning employment.~~]~~

END OF POLICY

Legal Reference(s):

ORS 180.810
ORS 180.805
ORS 181.826
OAR 581-021-0371

[7] {This language is included in the Attorney General's *K12 School Model Policy*. House Bill (HB) 4079 (2026) requires that districts adopt policies that are "consistent with applicable model policies published by the Attorney General as provided by ORS 180.810."}

Family Educational Rights and Privacy Act of 1974, 20 U.S.C. § 1232g (2012); Family Educational Rights and Privacy, 34 C.F.R. Part 99 (2017).
Oregon Attorney General's *K12 School Model Policy*
Senate Bill 1538 (2026).
Senate Bill 1594 (2026).
House Bill 4079 (2026).

PROPOSED

OREGON SCHOOL BOARDS ASSOCIATION
Inspire • Inform • Involve

Policy Update

August 2026 Vol. 73 No. 1 sch

80th Annual Convention
Nov. 12-14, 2026
Portland Marriott Downtown Waterfront, Portland, OR

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

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If you have questions regarding this publication or OSBA, please call our offices:
503-588-2800 or 800-578-6722

CONTENTS

KNA – Immigration Enforcement on District Property, Required, *New*
KNA-AR(1) – Interactions with Immigration Enforcement, Highly Recommended, *New*
KNA-AR(2) – Federal Immigration Enforcement Request Log, Optional, *New*

IMMIGRATION ENFORCEMENT

Summary

In 2026, the Oregon Legislature adopted three bills related to federal immigration enforcement in schools: Senate Bill (SB) 1538, SB 1594, and House Bill (HB) 4079). These new laws require the Oregon Attorney General's (AG) Office to publish model policies related to immigration enforcement in schools, which are available here. Districts must provide these model AG policies to employees, and must adopt a policy that is consistent the AG model policies by September 30, 2026.

The district-adopted policy must:

- Designate an individual to be the primary contact for immigration enforcement;
- Include requirements for notifying students, parents, staff and the community when federal immigration officials are confirmed to be on district property for enforcement purposes;
- Include training requirements for designated individuals;
- Be included in the student handbook and in culturally appropriate languages on the district's website; and
- Include any other requirements provided by law.

OSBA is releasing a new sample policy to help meet these requirements and two new administrative regulations to assist in the implementation of this policy.

Collective Bargaining Impact

None

Local District Responsibility

Review the policy and administrative regulations listed below and adopt a policy by September 30, 2026.

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

Policy(ies) and ARs Impacted by these Revisions

KNA – Immigration Enforcement on District Property, Required, *New*
KNA-AR(1) – Interactions with Immigration Enforcement, Highly Recommended, *New*
KNA-AR(2) – Federal Immigration Enforcement Request Log, Optional, *New*

ABOUT *POLICY UPDATE*

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

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

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

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

TRY OUR ONLINE POLICY DEMO

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

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

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

~~OSBA Model Sample Administrative Regulation~~
Ashland School District

Code: KNA-AR(1)
Revised/Reviewed: date

Interactions with Immigration Enforcement

The ~~[position~~ Superintendent~~]~~ is designated as the "immigration liaison."

1. Staff ~~[~~, contractors and volunteers~~]~~ shall adhere to all district policies when interacting with federal immigration authorities and the following administrative regulations:

   a. Unless expressly authorized by the superintendent or designee, or by the immigration liaison/ alternate immigration liaison on behalf of the superintendent or designee, staff shall not:

      (1) Provide federal immigration authorities with records or information about students, staff, or volunteers;
      (2) Confirm whether a student, staff member, or volunteer is present or make the student, staff member, or volunteer available;
      (3) Allow access to non-public areas of the district's facilities or property;
      (4) Sign documents presented by federal immigration authorities; or
      (5) Give consent to any immigration enforcement action.

   b. Staff may not interfere with lawful immigration enforcement actions or physically obstruct federal immigration authorities in any manner. However, staff should immediately report to the immigration liaison if they observe any conduct or enforcement activities by federal immigration authorities that violate state or federal law, or district policies, or that otherwise present a security threat or potential danger to students, staff, volunteers, or visitors.
   c. Staff who receive a request related to immigration enforcement must immediately notify the immigration liaison. The immigration liaison is responsible for interacting with the federal immigration authorities until the matter is concluded or the federal immigration authorities have been referred to the superintendent or designee.
   d. The immigration liaison or alternate immigration liaison should meet the federal immigration authorities at the school door, District Office (885 Siskiyou Blvd., Ashland, OR 97520), or other area designated by the superintendent or designee for this purpose.
   e. The immigration liaison shall provide federal immigration authorities with a copy of this policy and explain that school staff are required to follow these steps in this policy. The immigration liaison should inform the immigration authorities that school staff must contact the office of the superintendent or designee for guidance before providing access to school facilities, records, or other information.
   f. The immigration liaison should direct another staff member to contact the superintendent or designee while the immigration liaison remains with the federal immigration authorities.
   g. The immigration liaison must document the request from federal immigration authorities to the fullest extent possible under the circumstances. At a minimum, the documentation shall include the following information, if available:

      (1) The name, badge number, and agency of the law enforcement officer making the request;

(2) The number of officers present;
(3) Time, date, and location of the request;
(4) The nature of the request;
(5) The source of authority for the request, including whether the request is administratively or judicially authorized;
(6) Whether the request requires an immediate response;
(7) The identification of witnesses present; and
(8) How the encounter concluded.

h. The immigration liaison shall direct another staff member to transmit copies, photos, or other documentation provided by federal immigration authorities to the superintendent or designee, along with other information documented pursuant to this policy. The superintendent or designee must approve any response to a law enforcement request related to immigration enforcement as provided in Section 3 of this administrative regulation.

2. Determination of Validity of Judicial Warrant, Subpoena or Order

a. If presented with a warrant, subpoena or order by federal immigration authorities, the immigration liaison shall verify the validity of the warrant, subpoena or order by determining whether the warrant, subpoena or order is judicially authorized. An administrative warrant, subpoena, order or other legal process that has not been authorized by a judicial officer does not authorize the district to provide law enforcement with access to records or information, or facilities for purposes of immigration enforcement.

A judicially authorized warrant, subpoena or order contains the following key features:

(1) A caption, near the top of the document, identifying the court that issued the order (typically the federal district court for the District of Oregon);
(2) A signature block, near the end of the document, including the name of the person who signed the order, and identifying that individual as a judge, magistrate, clerk of court, or other person signing on behalf of a judge or magistrate, and the date of the signature; and
(3) An indication that the warrant, subpoena or order has not expired.

Examples of warrants and subpoenas are available in the Attorney General's model policies[1].

b. The immigration liaison shall notify the superintendent or designee of the warrant, subpoena or order and whether the warrant, subpoena or order appears on its face to be judicially authorized.
c. The immigration liaison should request a copy of the warrant, subpoena or order and transmit a copy of the warrant, subpoena or order for review by the superintendent or designee, or legal counsel.
d. The superintendent or designee shall make the final determination regarding the validity of any warrant, subpoena or order and whether, and to what extent, federal immigration will have access to district records or information, or facilities. If the superintendent or designee is uncertain as to the validity or scope of the warrant, subpoena or order, the superintendent or

[1] https://www.doj.state.or.us/wp-content/uploads/2026/06/Attorney-Generals-Model-Public-School-Policies-in-Compliance-with-SB-1538.pdf

designee should immediately consult legal counsel or a statewide or regional education organization.

3. Approval of Response by Superintendent

a. The immigration liaison shall notify the superintendent or designee of a request related to immigration enforcement prior to responding to the request. The superintendent or designee will only honor requests from immigration enforcement officers or other agencies enforcing federal immigration laws if the request is judicially authorized. If the superintendent or designee is uncertain as to the lawfulness or scope of the request, the superintendent or designee should immediately consult legal counsel or a statewide or regional education organization prior to approving a response.

b. If the superintendent or designee determines that a response is not authorized by a judicial subpoena issued as part of a court proceeding or by another compulsory court-issued legal process, such as a warrant, the superintendent or designee shall direct the immigration liaison to decline the request.

Upon direction of the superintendent or designee, the immigration liaison shall decline the request, refer the federal immigration enforcement authorities to the superintendent or designee, and request that they leave the premises.

The immigration liaison shall ensure that the information documented pursuant to this administrative regulation is submitted to the Oregon Criminal Justice Commission as provided in ORS 181A.826.

c. If the request is accompanied by a subpoena, warrant or order that appears on its face to be judicially authorized, the superintendent or designee must review and approve the immigration liaison of district's response to the request.

The superintendent or designee shall ensure that the district's response provides no greater access to records or information, or facilities, than that required by the subpoena, warrant or order.

d. If the request involves a warrant that appears to be valid and authorizes the arrest of a particular person, the superintendent shall direct the immigration liaison to request that the arrest be conducted in a manner that is the least disruptive to the school environment and to the person's wellbeing, which may include bringing the arrestee to the federal immigration authorities.

4. [School-Sponsored Events

If federal immigration authorities appear at a school-sponsored event open to the general public (e.g., field trip, athletic event, band event), staff should document their observations, notify the immigration liaison and follow any guidance provided by the immigration liaison. When alerted to the presence of federal immigration authorities at a school-sponsored event, the immigration liaison shall notify the superintendent or designee.]

5. [School Transportation/Buses

PROPOSED

If federal immigration authorities request to board a school bus or other vehicle transportation, the driver should ask them to wait outside the bus/vehicle, close the doors, and immediately call the immigration liaison and follow any guidance provided by the immigration liaison. The immigration liaison shall notify the superintendent or designee and coordinate an approved response as outlined in this policy.]

6. [Volunteers

The district will determine which volunteers need to receive training or materials regarding this administrative regulation.]

PROPOSED

Before We Talk About School Scenarios, We Need to Talk About Ashland's Future

By Joseph Hattrick, Superintendent, Ashland School District

Over the coming months, the Ashland community will hear a great deal about the future of our schools. Eventually, there will be public discussion of different scenarios involving programs, facilities, enrollment, finances, and how our district might be organized for the years ahead. Before any of those scenarios are presented, however, I believe our community deserves a clear understanding of why this conversation is happening in the first place.

No decisions have been made, and no school has been selected for closure. We are having this conversation now because I want our community to understand the facts and the forces shaping our future before decisions are made, not after.

The larger reality is that public education is entering a period of significant change, and many of the forces driving that change extend far beyond Ashland.

There are simply fewer children being born. Oregon's fertility rate is approximately 1.4 children per woman, compared with the 2.1 rate needed to maintain a stable population. Deaths have outnumbered births statewide every year since 2020 and in Jackson County since 2015. State projections anticipate approximately 80,000 fewer school-age children in Oregon by 2035.

That demographic shift is already affecting public schools across Oregon. Statewide enrollment has declined by approximately 43,000 students since 2019, representing six consecutive years of decline. Ashland is part of that same trend.

This past June, approximately 221 seniors graduated from Ashland High School. This fall, approximately 150 kindergartners entered our schools. The difference between those two classes is roughly 70 students, or the equivalent of three or four classrooms.

That matters because Oregon school funding is closely tied to enrollment. When enrollment declines, revenue declines with it. If the size and cost of a school system remain unchanged while the number of students it serves continues to decrease, the mathematics eventually stop working.

Housing is also part of this story. The data compiled for our transformation discussions show a median Ashland home value of approximately $584,000, a median household income of roughly $68,000, and a median age of 47.7. Those are not simply economic statistics. They are also education statistics because the long-term health of our schools depends on the long-term ability of families with children to live in our community.

A school district cannot solve housing affordability on its own, but we cannot ignore the connection between housing, family demographics, and enrollment. If we care about the future

of our schools, we also need to care about whether Ashland remains a place where young families can build a life.

There are other constraints as well. Oregon's school finance structure limits the district's ability to simply raise additional local operating revenue. Measures 5 and 50 constrain property tax rates, and the state's equalization formula limits how much additional local property wealth translates into additional general operating revenue for schools. We also no longer have open enrollment as a tool for broadly recruiting students from surrounding districts.

At the same time, the broader financial picture remains uncertain. State education funding, while historically high, remains below the level identified by the state's own educational funding benchmarks, and pension costs are expected to rise in the next biennium. Federal education funding has also become increasingly unpredictable, including the temporary withholding of approximately $73 million in Oregon education funds last year.

These are significant headwinds, and most of them are outside the direct control of Ashland School District. What we can control is how we respond.

It is equally important to acknowledge that not all of Ashland's financial challenges came from outside forces. Local enrollment declined by more than 400 students from its 2017–18 peak of approximately 2,950 students. During the pandemic, temporary federal ESSER dollars allowed the district to increase staffing to meet extraordinary student needs. When those temporary funds expired, staffing did not decrease proportionally. Over time, expenditures exceeded sustainable revenue, contributing to a projected structural deficit approaching $8 million. We confronted that problem directly.

During the 2024–25 school year, we froze hiring, reduced discretionary spending, implemented limited furlough days, relied on attrition where possible, and reduced administrative costs. Those decisions resulted in approximately $2.229 million in savings, exceeding our stabilization target.

The following year, we continued aligning the district with current enrollment by reducing approximately 27 FTE, recalibrating staffing and course sections, and reducing administrative staffing districtwide.

Those were difficult decisions, but they changed our financial trajectory. We moved from reacting to instability toward planning for long-term sustainability.

Just as importantly, we protected the educational experience our community values. Core academics, arts, music, athletics, Career and Technical Education, electives, dual-credit opportunities, student services, and intervention supports remain central to an Ashland education.

That distinction matters because the conversation we are entering now is not simply another round of emergency budget reductions. We have stabilized enough to begin asking a more ambitious question: What should Ashland School District become?

This summer, 556 community members helped answer that question through our transformation survey. Nearly two-thirds indicated that they were open to significant change if it makes the district sustainable.

The written comments told an even more important story. Across hundreds of responses and three open-ended questions, there was remarkable consistency about what people value, even when they disagreed about specific solutions.

People want us to protect educational excellence while living within our means. They want stronger literacy and mathematics, greater academic rigor, high expectations, college and career preparation, career and technical education, dual credit, critical thinking, and real-world skills.

At the same time, people do not want Ashland to become a generic school district. They want us to preserve the arts, music, theater, outdoor education, environmental learning, innovation, relationships, and whole-child education that make this community distinctive. Importantly, respondents did not generally describe those priorities as alternatives to academic excellence. They want both.

There was also a clear desire to reimagine rather than simply reduce. Community members suggested career pathways, apprenticeships, project-based learning, bilingual programs, dual credit, early childhood education, stronger career and technical education, flexible learning, and partnerships with local employers.

They also challenged us to think beyond the walls of our schools. Respondents repeatedly named Southern Oregon University, Rogue Community College, the Oregon Shakespeare Festival, healthcare organizations, local businesses, the City of Ashland, Parks and Recreation, nonprofits, farms, arts organizations, and outdoor organizations as potential partners in creating a richer learning ecosystem for students.

Perhaps most importantly, people asked us to lead transparently. They asked for clear financial information, long-term planning, consistency, fewer surprises, and thoughtful decision-making. The feedback suggests that people are willing to consider difficult choices when they understand the rationale and trust the process.

I hear that as both permission and responsibility—permission to consider meaningful change, and responsibility to make sure that change produces something better.

Our vision for 2026–27 is that every student is known, engaged, growing, and prepared for what comes next. That vision is supported by four commitments: Every Student Grows, Every Student Belongs, Every Student Is Prepared, and Our System Sustains the Mission.

Those commitments give us an important standard for evaluating any future scenario. We cannot judge an idea only by how much money it saves. We also have to ask whether it improves opportunities for students, strengthens academic excellence, preserves what is distinctive about Ashland, advances equity and access, helps attract and retain families, and remains financially sustainable over time.

Our 37-member Transformation Steering Committee, which includes parent representatives from each ASD campus, has developed a similar set of decision-making principles. Any recommendation should put students first, provide excellence and meaningful opportunity, advance equity and access, be financially responsible, remain adaptable and future-ready, and strengthen relationships and community pride.

On September 14, the Transformation Steering Committee will begin developing broad scenarios for the future of Ashland School District. In October and November, we will hold a community session at every school to share the scenarios, the criteria that will be used to evaluate them, and transparent estimates of the financial impact of each option. We will listen carefully to our community and publish both what we heard and how that feedback influenced the process before any recommendation is presented to the School Board.

The Board is tentatively scheduled to make a decision in January, and no changes resulting from this process would take effect before the 2027–28 school year.

It is understandable that conversations about change create anxiety and can generate rumors about closure decisions that haven't been made. Schools represent more than facilities. They represent neighborhoods, memories, relationships, and generations of children. We should honor that. At the same time, I hope we are willing to ask not only what we might lose, but also what we might gain.

Could a smaller facilities footprint allow us to direct more resources into classrooms and programs? Could deeper community partnerships expand opportunities for students without dramatically increasing costs? Could every Ashland student graduate having explored a meaningful pathway toward college, career, trade, or apprenticeship? Could our schools become even more connected to Southern Oregon University, Rogue Community College, the arts, healthcare, local businesses, and the extraordinary natural environment that surrounds us?

And could Ashland once again become a district that families deliberately seek out because of the quality and distinctiveness of the educational experience available here?

Those are the questions that should define transformation.

Our community feedback can be summarized in a powerful way: Ashland appears ready to support meaningful structural change if the result is a financially sustainable district that provides outstanding academics while preserving the arts, community partnerships, and distinctive educational character that make Ashland unique.

We are not pursuing transformation because Ashland School District is failing. We are pursuing transformation because we have stabilized enough to choose our future before circumstances choose it for us.

Nothing has been decided, but doing nothing is also a decision. If demographic and financial trends continue while our system remains unchanged, circumstances will eventually make choices for us.

I would rather make those choices deliberately, transparently, and with our community.

The question before Ashland is not simply what we can preserve from the school district we have today. It is what we are willing to build for the students who come next.

We have an opportunity to choose our future. We should use it.

Joseph Hattrick is superintendent of the Ashland School District.

September 10, 2026

The School Board, sitting as the local contract review board for the Ashland School District, is requested to consider an exemption from public bidding and use of an alternative contracting method for the Helman Elementary School Seismic Retrofit Project. ORS 279C, sets forth the process for a public agency's procurement of public improvement contracts, requiring public agencies to award contracts to the low-responsive bidder.

It is our perspective that the low bid process has inherent drawbacks which we believe may not align with the District's best interests.

We are requesting the School Board adopt an alternative contracting method as follows:

- Construction Manager|General Contractor (CM|GC).

At the September 10, 2026 meeting, the Findings of Fact for this project will be presented to the School Board for review, comment, and approval. We will request the School Board to take action to approve the use of the CM|GC Alternative Contracting Method.

NOTICE OF PUBLIC HEARING
ASHLAND SCHOOL DISTRICT
CONSTRUCTION MANAGER | GENERAL CONTRACTOR

On September 10, 2026, at 6:30 PM the **Ashland School District Board of Directors** will hold a public hearing and sit as the local contract review board to consider the request of the **Ashland School District** for adoption of findings and approval of an exemption from the competitive bidding requirements of ORS 279C.335(1), pursuant to ORS 279C.335(2), to engage in the alternative contracting method of Construction Manager | General Contractor form of delivery for the Helman Elementary School Seismic Retrofit Project. The public hearing is for the purpose of taking comments on the draft findings for an exemption from the competitive bidding requirement.

Copies of the draft findings are available to be picked up from the following contact:

Ashland School District
Josh Whitaker, Regional Director
HMK Company
46 N Front Street, Suite 201
Medford, Oregon 97501

Published:
Daily Journal of Commerce, August 26, 2026

EXHIBIT B TO BOARD RESOLUTION

PROPOSED FINDINGS
PURSUANT TO ORS 279C.335 AND OAR 137-049-0610, -0620, -0630, and -0690
BY THE ASHLAND SCHOOL DISTRICT FOR
HELMAN ELEMENTARY SCHOOL SEISMIC RETROFIT PROJECT

On September 10, 2026, the Ashland School District (the "District") requested an exemption from the competitive bidding requirements of ORS Chapter 279C.335(1) pursuant to ORS 279C.335(2) for the specified project, known as the Helman Elementary School Seismic Retrofit Project by the District to enable it to utilize an alternative contracting method for construction of the Project. The specific alternative contracting method which the District wishes to utilize is a Construction Manager | General Contractor (CM|GC) selection process.

District is seeking experienced CM|GC contractors for the Helman Elementary School Seismic Retrofit Project.

ORS 279c.335(2)(b)-- In approving a finding under this paragraph, the…local contract review board shall consider the type, cost and amount of the contract…

OAR 137-049-0630 Descriptions. Findings supporting a competitive bidding exemption must describe with specifity any Alternative Contracting Method to be used in lieu of competitive bidding, including, but not limited to, whether a one-step (request for Proposals), two-step (beginning with a Request for Qualifications, followed by a request for Proposals) or other solicitation process will be utilized. The Findings may also describe anticipated characteristics or features of the resulting Public Improvement Contract. However, the purpose of an exemption from competitive bidding is limited to a determination of the Procurement method. Any unnecessary or incidental descriptions of the specific details of the anticipated Contract within the supporting Findings are not binding upon the Contracting Agency. The parameters of the Public Improvement Contract are those characteristics or specifics that are announced in the Solicitation Document.

The Board is requested to approve the following findings:

The School Board, having considered the evidence at the public hearing concerning this request, finds:

1. The School District is a local government body organized and existing under the laws of the State of Oregon.

2. The School Board is the local contract review board for the District.

With regards to ORS 279C.335, the School Board has considered the following in its decision to exempt the Project from competitive bidding and use the CM|GC alternative contracting method:

1. The exemption is unlikely to encourage favoritism in the awarding of the public improvement contract or substantially diminish competition for the public improvement contract.

   Analysis:

   a. The District will select the CM|GC through a competitive request for proposals process that fosters competition and focuses on delivering value to the District with no favoritism through an objective point-scoring system. The District will administer an openly-advertised CM|GC process in a manner that will attract competition.

      "Subcontractable" work will be procured by the CM|GC firm, with the oversight of the District through a bid process. Should the CM|GC firm choose to bid any of the

subcontractable work, then bids will need to be submitted to the District or an independent third party a minimum of 2 hours prior to bid closing.

Finding:

a. The process used by the District makes the exemption unlikely to encourage favoritism in the awarding of the Project or substantially diminish competition for the Project.

2. Awarding a public improvement contract under the exemption is likely to result in substantial cost savings and other substantial benefits to the District.

Analysis:

a. Public benefits

The renovated District facilities will facilitate better working environments, providing safer and more efficient buildings. The CM|GC will help to maximize the quality and amount of construction items that can be delivered, within budget, and on schedule.

b. Value engineering

The CM|GC alternative contracting method provides many benefits and opportunities for cost savings. During the preconstruction phase, the CM|GC will be evaluating the budget and making suggestions for cost-saving changes and value enhancements. The CM|GC will evaluate major systems and make design recommendations to the project team about which systems are most cost-effective while being durable, long lasting and easy to maintain. Use of the CM|GC alternative contracting method will likely result in substantial benefit to the District by facilitating and coordinating the most efficient use of limited project funds.

The CM|GC also identifies whether project sequencing is viable and design elements can be built as drawn. All of these beneficial actions by the CM|GC will improve design, expedite construction and eliminate the potential for costly change orders. The benefits of value engineering are not available with the low bid process.

Findings Under ORS 279C.335(2)(b)

Information related to each of the requirements of ORS 279C.335(2)(b) is as follows:

(A) How many persons are available to bid.

Information considered by the District:

The CM|GC will be selected through a competitive Request for Proposal (RFP) process. The notification of will be publicly advertised in a state-wide trade newspaper. A review committee will screen and rank proposals based on the criteria described in the request for proposal. Based upon the ranking, one or more proposers may be selected for interview. It is anticipated there are multiple qualified contractors available to propose on this project.

(B) The construction budget and the projected operating costs for the completed public improvement.

Information considered by the District:

The total maximum allowable construction budget is approximately $1,800,000.00.

(C) Public benefits that may result from granting the exemption.

Information considered by the District:

The upgraded District facilities will facilitate better working environments, providing safer and more efficient buildings. CM|GC will help to maximize the quality and amount of construction items that can be delivered, within budget, and on schedule.

(D) Whether value engineering techniques may decrease the cost of the public improvement.

Information considered by the District:

During the design phase prior to material and subcontractor bidding, the CM|GC will provide value engineering and update cost estimate information. This engineering and cost estimate will assist final decision-making about the project scope, product quality and material finish. Using a CM|GC will allow more flexibility to develop, evaluate, and implement design changes with less impact on construction cost and time. In the event fast track construction is necessary, the CM|GC alternative contracting method provides an appropriate means of managing fast track construction with an agreed completion date and a guaranteed maximum price for the construction.

Use of the CM|GC alternative contracting method will likely result in substantial cost savings by minimizing costly change orders through CM|GC value engineering, constructability review, scheduling, and estimating during the design process.

Use of the CM|GC alternative contracting method will likely result in substantial cost savings through efficiencies gained from having only one general contractor on the site, thereby reducing the need for additional job site conditions from multiple general contractors.

Use of the CM|GC alternative contracting method will likely result in substantial benefit to the District by facilitating and coordinating the most efficient use of limited bond funds.

(E) The cost and availability of specialized expertise that is necessary for the public improvement.

Information considered by the District:

The contractor ultimately selected as CM|GC will be required in the RFP process to demonstrate experience and expertise in providing CM|GC services to public and/or private organizations. The contractor will also be required to have thorough knowledge of construction and improvements of similar building type and function. The CM|GC firm is hired at the beginning of the project to assist with master planning, design considerations, administrative coordination, scheduling, budget estimating, constructability review, and value engineering.

(F) Any likely increases in public safety.

Information considered by the District:

All work during the construction will be done in accordance with OR-OSHA safety regulations. The CM|GC selected will be required to be highly qualified and capable and show evidence of construction safety practices that are at the highest level of integrity. Staff safety is of upmost importance during construction. The CM|GC's input into construction sequencing can reduce issues related to safety.

(G) Whether granting the exemption may reduce risks to the contracting agency, the state agency or the public that are related to the public improvement.

Information considered by the District:

The project includes technical and logistical complexities, the risks of which will be addressed with the CM|GC firm working with the District and the design professional to solve specific challenges identified during the pre-construction phase. Technical complexity relates to planning and coordinating the various components of the project for safety, schedule and budget. The project includes a limited budget as well as limited construction time. Construction may not interfere with staff working on site.

(H) Whether granting the exemption will affect the sources of funding for the public improvement;

Information considered by the District:

Funding for this project is provided through grants and other funding sources. The CM|GC alternative contracting method provides cost controls for limited budgets and therefore benefits the District. The team approach, the schedule, the value analysis, and constructability reviews provide the ultimate in effective cost analysis.

(I) Whether granting the exemption will better enable the contracting agency to control the impact that market conditions may have on the cost of and time necessary to complete the public improvement.

Information considered by the District:

The CM|GC alternative contracting method is a modern construction delivery method used by both public and private organizations. The CM|GC is tasked with keeping the project team up-to-date on the latest construction techniques and products. The CM|GC will inform the project team of current market conditions, labor and materials availability, and construction methodologies that can reduce design and construction time and costs.

(J) Whether granting the exemption will better enable the contracting agency to address the size and technical complexity of the public improvement.

Information considered by the District:

The project must be delivered within strict technical and logistical parameters. The CM|GC firm will work with the District and the design professional to solve specific challenges identified during the pre-construction phase. Technical complexity relates to planning and coordinating the various components of the project for safety, schedule and budget. The project includes a limited budget as well as limited construction time.

(K) Whether the public improvement involves new construction or renovates or remodels an existing structure.

Information considered by the District:

This project involves addressing both structural and non-structural seismic deficiencies identified in the engineering assessment. The focus is on improving the building's ability to transfer and resist seismic forces by establishing a complete load path to the foundation, strengthening existing walls or adding new lateral force-resisting elements, improving wall anchorage and diaphragm connections, reinforcing walls for out-of-plane loads, and enhancing diaphragms through additional reinforcement, blocking, nailing, tension ties, and framing. The measures also include installing anchors to increase connection stiffness and reduce relative movement between walls and diaphragms. Non-structural recommendations aim to improve the stability and safety of architectural and mechanical components by adding strongback and lateral bracing to partition walls, providing seismic separation joints in ceilings, bracing light fixtures, upgrading glazing systems with laminated glass designed to remain in place when cracked, anchoring tall contents and equipment, and bracing fluid and gas piping to the building structure.

(L) Whether the public improvement will be occupied or unoccupied during construction.

Information considered by the District:

The Project will be occupied during the work.

(M) Whether the public improvement will require a single phase of construction work or multiple phases of construction work to address specific project conditions.

Information considered by the District:

The Project consisted of a single phase.

(N) Whether the contracting agency or state agency has, or has retained under contract, and will use contracting agency or state agency personnel, consultants and legal counsel that have necessary expertise and substantial experience in alternative contracting methods to assist in developing the alternative contracting method that the contracting agency or state agency will use to award the public improvement contract and to help negotiate, administer and enforce the terms of the public improvement contract.

Information considered by the District:

Yes, the District, working with an Owner's Representative, legal counsel, and design professional that have extensive experience with the CM|GC alternative contracting method. The District is also proactively working with legal counsel experienced in construction and with CM|GC, design-build, and alternative contracting methods. The District intends to retain such consultants as may be necessary to affect the Project.

Based upon the findings set forth herein, the Ashland School District Board of Directors (the "District"), sitting as the local contract review board for the Ashland School District, on its request for exemption from the public contracting rules under ORS 279C.335(2) hereby resolves, finds and concludes:

1. Notice of public hearing was published in at least one trade newspaper of general statewide circulation a minimum of 14 days prior to the hearing.

2. A copy of the notice is attached hereto as Exhibit "A" and incorporated by this reference.

3. At the public hearing, the School Board gave an opportunity for any interested party to appear and present comment.

4. The Findings attached as Exhibit B ("Findings") have been considered by the School Board and are adopted and approved.

5. Based upon the notice to the public, and the approved Findings, and the use of the Construction Manager | General Contractor process as the manner of selecting the proposed contractor for the Project, it is unlikely that an exemption from the competitive bidding requirements of the public contracting statutes will encourage favoritism in the awarding of a public contract for the Project, or substantially diminish competition for public contracts of the like nature.

6. Based upon the approved Findings, it is reasonably anticipated that the awarding of a public contract using the alternative method of Construction Manager | General Contractor pursuant to an exemption under ORS 279C.335(2) will likely result in a substantial cost saving to the District by increasing the efficiency and accuracy of the contractor's performance of its work on the Project, by reducing the administrative costs and burden for the Project, and by reducing the time required for completion of the Project, which will allow the District to occupy the premises with minimum impact on the programs or operations of the District.

7. The District is granted an exemption under ORS 279C.335(2) from the competitive bidding requirements of ORS 279C.335(1) for the Project, so that it can utilize the Construction Manager | General Contractor method as the alternative contract method, provided the District also remains permitted, at the District's discretion, to use traditional bidding for the Project pursuant to ORS 279C.335(1).

8. For any Project utilizing the Construction Manager | General Contractor method of procurement, the procurement shall be in accordance with the Attorney General Model Rules adopted under ORS 179A.065.

These resolutions shall take effect immediately.

DATED _____.

ASHLAND SCHOOL DISTRICT
SCHOOL BOARD

By: _____
Its Board Chair

And By: _____
Its Board Vice Chair

HMK COMPANY

September 10, 2026

Steve Mitzel, Executive Director of Operations
Ashland School District
885 Siskiyou Boulevard
Ashland, Oregon 97520

Re: Ashland School District
Seismic Retrofit Project
Helman Elementary School
Recommendation to Award Contract for Design Services

Dear Steve,

After careful review and consideration, the Design Services Scoring Committee and HMK Company recommend the Ashland School District Board of Directors] take action to award a Contract for Design Services to arkitek: design&architecture for the Seismic Retrofit Project at Helman Elementary School.

This recommendation is based upon a comprehensive Design Services selection process for the project. A request for proposals (RFP) was issued on July 24, 2026, and closed on August 20, 2026, for the Seismic Retrofit Project at Helman Elementary School. Three firms submitted proposals: arkitek: design&architecture, BBT Architects, and IMEG. Following a comprehensive evaluation, the Design Services Scoring Committee chose arkitek: design&architecture to be the top-ranking firm.

HMK Company finalized the fee negotiations and is recommending award in the amount of $147,770.00. The fee is 9% of the established project Maximum Allowable Construction Cost (MACC) of $1,800,000.00. Their fee is in line with Design Services fees we have seen with similar projects.

The firm represented above is of good reputation and have committed the necessary resources to accomplish the Ashland School District project goals.

Sincerely,

Joshua Whitaker

Joshua Whitaker
Regional Director
HMK Company

Att: Scoring Tally
arkitek: design&architecture Fee Proposal

46 N Front Street, Suite 201, Medford, OR 97501 | 541.210.9845 | www.hmkco.org

Doc ID: c2587f2958ed32ff358c0126e50fed887a50cd4f

ASHLAND SCHOOL DISTRICT
HELMAN ELEMENTARY SCHOOL
SEISMIC DESIGN SERVICES REQUEST FOR PROPOSAL
Tuesday, August 25, 2026

	arkitek: design&architecture						BBT Architects						IMEG					
Criteria	1	2	3	4	5	Total	1	2	3	4	5	Total	1	2	3	4	5	Total
Average Score	P	24.33	29.67	20.00	25.00	99.00	P	24.00	26.67	19.33	25.00	95.00	P	21.67	25.00	16.00	25.00	87.67

Criteria	100 Possible Points
1	Cover Letter: (P/F)
2	Company Overview: (25 Points Max)
3	Project Approach (30 Points Max)
4	Performance History (20 Points Max)
5	References (25 Points Max)

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HELMAN ELEMENTARY SCHOOL
BUILDING A SEISMIC RETROFIT

09/02/26

PROJECT FEE ANALYSIS

TOTAL PROJECT FEE	**16800**	**$8.80**	**$147,770**	

ITEM	AREA (SF)	$/SF	FEE	NOTES
ARCHITECTURAL			**$80,500.00**	
Multipurpose Room/ Stage	5700	$3.00	$17,100.00	
Music Room	950	$3.00	$2,850.00	
Mechanical Room	640	$7.00	$4,480.00	
Offices, Restrooms, Ect.	7410	$7.00	$51,870.00	
Outdoor Covered Area	2100	$2.00	$4,200.00	
STRUCTURAL	LS		**$29,270.00**	CIOTA ESTIMATE
MECHANICAL/ PLUMBING	LS		**$10,000.00**	MFIA ALLOWANCE
ELECTRICAL	LS		**$10,000.00**	DOUGLAS ALLOWANCE
CIVIL/ LANDSCAPE	LS		**$18,000.00**	POWELL/ ARKITEK ALLOWANCE

HOURLY RATES:

Architect: Arkitek: design&architecture

Principal, Project Architect	$185
Project Manager	$125
Technician	$85

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Ashland School District 5

Code: II/IIA-AR
Revised/Reviewed: 12/01/04; 6/12/17; 4/25/22; 1/08/26
Orig. Code: IIA-AR(1), IIA-AR(2), IIA-AR(3)

Instructional Materials Selection

The Ashland School Board shall be responsible for ensuring that the selection of instructional materials for the Ashland School District are consistent with the district's values and policies, as well as the most current state standards.

Any person responsible for the adoption of textbooks may not prohibit the use of, or refuse to approve the use of, textbooks on the basis that the textbooks include a perspective, study or story of, or are created by, any individual or group identified in ORS 337.260(1)(a)-(e), i.e., are Native American, European, African, Asian, Pacific Island, Chicano, Latino, Middle Eastern or Jewish descent, have disabilities, are immigrants or refugees, or are lesbian, gay, bisexual or transgender.

The process is begun through a recommendation to the board that an adoption is necessary or highly recommended based on the instructional materials adoption schedule defined by the Oregon Department of Education or student need, and the funds to acquire and implement the materials are available to be designated or appropriated.

Launch: School board launches the adoption process. A team is formed that receives training, elicits input and establishes a vision with aligned criteria.

(1) The board will approve the initiation of the process and articulate the desired outcome (e.g., one consistent curriculum per level). The superintendent will name a process facilitator.

The School Board will have the opportunity to preview instructional materials recommendations before the public review process and will have final authority on approving recommended instructional materials for adoption.

Policy also states that teachers, administrators and residents of the community shall be involved in a process designed to ensure that each student will be educated to the fullest by means of a wide variety of materials based on the state standards for public schools, which will be provided to meet curricular needs, and the greatest possible diversity of student interests. To the extent possible, all core adopted instructional materials used as part of the educational curriculum of a student shall be adopted by the Board and available for inspection by the parents or guardians of the student prior to their adoption and use. All materials will be evaluated to be consistent with our equity policy and be accessible through the principles of Universal Design for Learning and Multi-tiered Systems of Support.

Definitions: "Instructional material for purpose of Oregon law is defined as any organized system which constitutes the major instructional vehicle for a given course of study, or any part thereof. "OAR 581-011-0050. The district defines these materials as instructional content provided to the student through textbooks, supplemental texts and library books regardless of format, encompassing printed or representational, audiovisual, and electronic or digital materials. This includes books, periodicals, newspapers, pictures, videos, television recordings, internet sources, software, and audio recordings.

Core Adopted Instructional Materials: Instructional materials adopted and paid for by the District for use by all teachers with all students as appropriate.

Any person responsible for the adoption of textbooks may not prohibit the use of, or refuse to approve the use of, textbooks on the basis that the textbooks include a perspective, study or story of, or are created by, any individual or group identified in ORS 337.260(1)(a)-(e), i.e., are Native American, European, African, Asian, Pacific Island, Chicano, Latino, Middle Eastern or Jewish descent, have disabilities, are immigrants or refugees, or are lesbian, gay, bisexual or transgender.

Supplemental Adopted Instructional Materials: Instructional materials adopted by the district, in addition to the Core Adopted Instructional Materials. These may be adopted during the regular adoption window or adopted later in response to student performance data. These materials are selected by teachers for use based upon the needs of their students and their professional judgment. In combination, the Core Adopted Instructional Materials and Supplemental Adopted Instructional Materials will provide a sufficient resource to support a range of options for teachers to differentiate instruction as they address the district learning targets and state standards.

Any person responsible for the adoption of textbooks may not prohibit the use of, or refuse to approve the use of, textbooks on the basis that the textbooks include a perspective, study or story of, or are created by, any individual or group identified in ORS 337.260(1)(a)-(e), i.e., are Native American, European, African, Asian, Pacific Island, Chicano, Latino, Middle Eastern or Jewish descent, have disabilities, are immigrants or refugees, or are lesbian, gay, bisexual or transgender.

Teacher-selected additional instructional materials: Instructional materials selected by teachers for use in individual classrooms, in addition to the district-adopted instructional materials.

Selection of Core Adopted and Supplemental Adopted Instructional Materials: While the specific procedure may vary depending upon the particular subject area under study, the following elements shall be present:

1. As a part of the district's curriculum review process, a committee, hereby known as the curriculum committee, will be established. The superintendent will name a process facilitator.

   In the fall of an adoption year, committee members will be selected and begin examining student data to analyze existing strengths and weaknesses of the curricular area, and develop subject specific criteria. Such criteria must be consistent with:

   a. existing state and district board policies and administrative regulations;
   b. state achievement standards for students;
   c. the curricular and instructional philosophy of the district;
   d. the district's Equity Policy
   e. accessibility standards for students of all abilities, including the principals of Universal Design for Learning and Multi-tiered Systems of Support
   f. state and district selection criteria for instructional materials; and
   g. any guidelines unique to the curricular area which are established through the review process by the curriculum committee.

2. The committee will present relevant student data, standards, and proposed decision matrix to the board for input. After incorporating input, the committee will refine the decision matrix and begin materials review;

3. The curriculum committee shall prepare a budget for purchase of the recommended materials. Costs shall reflect the per pupil expenditure needed to provide the materials that are essential, in line with the state recommendation. In the event that an independent adoption is recommended, the above detailed cost guidelines still apply.

4. By March of an adoption year, or as soon as is practicable thereafter, the committee will present the result of their work, and provide the recommended curriculum materials for Board and public review for feedback.

5. By May, The Board will review community feedback on the curriculum choice and hold a vote on whether or not to approve the adoption by the May Regular Session in order to receive materials in time for teacher training.

6. If required, the superintendent shall notify ODE within 30 days of the Board independently adopting instructional materials.

7. Teachers will choose instructional materials for use from among the materials approved by the Board.

8. Every student must have access to the adopted materials necessary for instruction and be able to access such materials at home as needed.

9. Parents shall have access to all adopted instructional materials for review.

10. The district may revise learning targets between state adoption years, prompted by changing state standards, emerging research, or program changes. Should the district find that adopted materials and staff development do not adequately facilitate student learning as evidenced by lack of achievement growth on state standards and district learning targets, the superintendent may:

    a. Authorize further data gathering and analysis.
    b. Authorize further targeted staff development.
    c. Form a committee to consider potential additional supplemental materials adoptions that address learning targets based upon data gathered and analyzed.

11. Should a school or program within a school find that adopted materials are not meeting the needs of students as evidenced by lack of achievement growth on state standards, the school or program may, after the initial three years of implementation using adopted materials, pilot alternative materials in consultation with the superintendent.

Teacher-Selected Additional Instructional Materials

Teachers may use their professional judgment to select additional learning materials in accordance with Selection Criteria for Instructional Materials contained within this document to supplement and enrich the instructional program. All teacher-selected additional materials required by the teacher for student use shall be carefully previewed by the teacher to ensure the instructional value is culturally appropriate and designed to student age level and classroom subject matter. These materials must be used within legal

copy right limits and publisher licensing agreements. Teacher selected materials must be accessible to all students. When the proposed materials may conflict with district criteria, the teacher shall complete a Teacher-Selected Additional Instructional Materials Approval Form and submit it to their principal or designee. If use of the materials is approved, a permission slip will be used to inform parents of the intended use of the additional materials and their content. In this particular instance, the teacher shall provide alternative instructional materials at the request of the parent. Efforts will be made to serve all students in the same classroom.

Selection Criteria for Teacher Selected Instructional Materials

Materials selected will be carefully evaluated based on the following selection standards and guidelines. In most instances, the selected materials should meet a significant number of the criteria listed below, although a single resource need not meet all the criteria in order to be selected. Materials will be selected for their strengths rather than rejected for their weaknesses. These criteria apply to the selection of new materials for multiple school use, single school use and individual classroom and library use as well as materials donated to the district.

Standard 1: Materials shall be consistent with and provide both support and enrichment for the district's general educational goals, its selected program goals and the objectives of specific courses.

Standard 2: Materials shall meet high standards of quality in: factual content, educational significance, readability, artistic quality and/or literary style presentation, physical format and technical quality.

Standard 3: Materials shall be based on current Oregon standards and be culturally appropriate for the ability level, learning styles, emotional and social development of the students for whom the materials are selected.

Standard 4: Materials shall promote growth in factual knowledge and critical thinking.

Standard 5: Materials shall stimulate growth in the areas of literary appreciation, social and aesthetic values and ethical standards.

Standard 6: Selected materials shall support a balanced approach to controversial issues that will include representation of various points of view even when those opinions represented are controversial. The inclusion of controversial materials does not imply endorsement of the ideas by district personnel.

Standard 7: Materials shall incorporate the voice, culture, and perspectives of students, staff, families, and communities in order to support and enhance student success and incorporate the contributions from diverse groups to include age; gender identity; belief system (e.g., religious, spiritual, political, social); racial, ethnic and cultural origin; socio-economic background, diverse ability, sexual orientation or disability.

Standard 8: Materials selected will be in compliance with all criteria and procedures as outlined on OAR 581-011-0050 to -0119 and ORS Chapter 337.

Any person responsible for the adoption of textbooks may not prohibit the use of, or refuse to approve the use of, textbooks on the basis that the textbooks include a perspective, study or story of, or are created by, any individual or group identified in ORS 337.260(1)(a)-(e), i.e., are Native American, European, African,

Asian, Pacific Island, Chicano, Latino, Middle Eastern or Jewish descent, have disabilities, are immigrants or refugees, or are lesbian, gay, bisexual or transgender.

Objections to Instructional Materials:

Any resident of the district may raise objection to instructional materials used in the district's educational program despite the fact that the individuals selecting such materials were duly qualified to make the selection and followed the proper procedure and observed the criteria for selecting such material. The district official or staff member receiving a complaint regarding instructional materials shall try to resolve the issue informally. The materials shall remain in use unless removed through the procedure in section "Request for Reconsideration" item 5 and 8.c of this regulation.

1. The district official or staff member initially receiving a complaint shall explain to the complainant the district's selection procedure, criteria and qualifications of those persons selecting the material. The district official or staff member initially receiving a complaint shall explain to his/her best ability the particular place the objectionable material occupies in the education program and its intended educational usefulness, or refer the complaining party to someone who can identify and explain the use of the material.

2. In the event that the person making an objection to material is not satisfied with the initial explanation, the person raising the questions should be referred to someone designated by the principal. If, after private counseling, the complainant desires to file a formal complaint, the person to whom the complainant has been referred will assist in filling out a Reconsideration Request Form in full.

3. The individual receiving the initial complaint shall advise the principal of the initial contact no later than the end of the following school day, whether or not the complainant has apparently been satisfied by the initial contact. A written record of the contact shall be maintained by the principal.

Request for Reconsideration

1. Any resident or employee of the district may formally challenge the appropriateness of instructional materials used in the district's educational program. This procedure is to provide a forum for those persons in the schools and the community who are not directly involved in the selection process.

2. Unless covered otherwise in state law, educational standards cannot be challenged.

3. All school offices will keep on hand and make available Reconsideration Request Forms. All formal objections to instructional materials must be made on this form.

4. The Reconsideration Request Form shall be signed by the complainant and filed with the superintendent. The superintendent shall immediately notify the School Board.

5. In unusual circumstances the material may be removed temporarily by a vote of the School Board pending the outcome of the reconsideration committee.

6. Within five business days of the filing of the form, the superintendent or person so designated by the superintendent shall file the material in question with the reconsideration committee. The committee shall recommend disposition to the superintendent.

7. Generally, access to challenged material shall not be restricted during the reconsideration process. In unusual circumstances the material may be removed temporarily by following the provisions of Section "Request for Reconsideration" item 5 or item 8.c of this regulation.

8. The Reconsideration Committee.

   a. The reconsideration committee shall be made up of nine members:

      (1) One teacher designated annually by the superintendent;
      (2) One school librarian designated annually by the superintendent;
      (3) One member of the administrative staff designated annually by the superintendent;
      (4) Five members from the community appointed annually by the Board;
      (5) One student selected annually by the student council.

   b. The chair of the committee shall not be an employee or officer of the district. The secretary shall be an employee or officer of the district.
   c. Special meetings may be called by the superintendent to consider temporary removal of materials in unusual circumstances. Temporary removal shall require a three-fourths vote of the committee.
   d. The committee shall receive all Reconsideration Request Forms from the Superintendent or person designated by the superintendent.
   e. The procedure for the first meeting following receipt of a Reconsideration Request Form is as follows:

      (1) Distribute copies of written request form;
      (2) Give complainant or a group spokesperson an opportunity to talk about and expand on the request form;
      (3) The Committee shall give the person who selected the material in question an opportunity to discuss the rational for selection;
      (4) Distribute reputable, professionally prepared reviews of the material when available;
      (5) Distribute copies of challenged material to be fully reviewed.

   f. The committee may request that individuals with special knowledge be present to provide information.
   g. The complainant shall be kept informed by the superintendent concerning the status of the complaint throughout the committee reconsideration process. The complainant shall be given appropriate notice of such meetings.
   h. The committee decision will require a two-thirds vote.
   i. The committee shall make its decision in open session. The committee's final decision will be:

      (1) To take no removal action;
      (2) To remove all or part of the challenged material from the total school environment.
      (3) To limit the educational use of the challenged material which would include offering alternative materials.

   j. The vote on the decision shall be by secret ballot. The written decision and its justification shall be forwarded to the complainant, school board and superintendent and placed on the school board agenda for appropriate action.

k. A decision to sustain a challenge shall not be interpreted as a judgement of irresponsibility on the part of the professionals involved in the original selection or use of the materials
l. Request to reconsider materials which have previously been before the committee must receive approval of a majority of the committee members before the materials will again be considered. Every Reconsideration Request From shall be acted upon by the committee.
m. Committee members directly associated with the selection of the challenged material shall be excused from the committee during the deliberation on such materials. The superintendent may appoint a temporary replacement for the excused committee member, but such replacement shall be of the same general qualifications as that person excused.
n. If the complainant is not satisfied with the decision, a statement may be submitted to the school board for consideration at the meeting of the Board in which the decision is being reviewed.

Play Selection

Pre-Production

1. Theatre Arts teacher will complete the play rationale/comment form and submit it and a copy of the script to the building principal prior to publicizing the production or casting.

2. The building principal(s) may review the rationale/comment form to identify evidence of educational value and any concerns about potential sensitivity of topics in the recommended piece in a timely manner determined by the building administrator and Theatre Arts specialist. If there is mutual agreement of support for the proposed play selection, the process should move ahead to step 4.

3. The building principal(s) and the Theatre Arts teacher may begin a dialogue regarding the educational value of the piece as well as discuss any concerns over its topic and/or content. If concerns exist, the building principal, in consultation with the Theatre Arts teacher, will invite others into the conversation to assist in the decision making process. The outcome of the conversations would either be a recommendation to move forward with production, or a recommendation to make another choice of plays to perform. Ultimately, the principal(s) will be responsible for the final decision.

4. Theatre Arts specialists will publicly announce selected play titles two weeks prior to auditions and after step 2 or 3. In the absence of expressed concerns, play production will proceed. Should community members express concerns within that time frame, the site may decide to stop production planning and begin the collaboration process in step 3 (see above).

Film/Video Use

The showing of movies and videos must be limited to specific educational purposes. A full-length or clip of a movie or video recording may only be shown in school if the content is relevant to the curriculum and specific educational objectives, is appropriate to the age and maturity of the students, is a productive use of class time and will not cause classroom disruption.

1. Compliance with U.S. Copyright law Section 110(1) requires that a rented or privately owned movie or video may not be shown in the classroom unless all of the following fair use requirements are met:

a. The movie or video must be shown by the teacher in connection with face to-face teaching activities in a classroom or area devoted to instruction.
b. The showing of the movie must be directly related to the curriculum and lesson objectives.
c. The entire audience must be involved in the teaching activity.
d. The teacher has no reason to believe that the videotape was unlawfully made.
e. Note: Educators who show movies or video for entertainment purposes may be individually liable for up to $30,000 in civil statutory damages for copyright infringement, imprisonment of up to five years or criminal fines of up to $250,000.

2. Teachers may only show programs recorded from network and cable television channels according to the following guidelines*:

a. A recorded television program may be retained for 45 consecutive calendar days after the date of the recording and must be erased or destroyed at the end of the 45 day period.
b. The recording may be shown once within the first ten days of recording for each class. It may be shown once again within this ten-day period when instructional reinforcement is necessary.
c. After the first ten consecutive school days, the recording may only be used for teacher evaluation purposes, i.e., to determine whether or not to include a broadcast program in the teaching curriculum and may not be shown to students.
d. Copies may be made from off-air recordings as necessary to meet the legitimate needs of teachers. However, all copies are subject to the same provisions listed above.

* Federal Guidelines for Off-Air Recording of Broadcast Programming for Educational Purposes (Congressional Record, 1981, 127, pt. 18 24049; Talab, 1986: 37-41, 116, 124-125.)

Note: The copying or use of programs transmitted via subscription television cable services, such as HBO or Showtime, is illegal. Such programs are licensed for private/home use only and may not be used in public schools.

Related Policies:

IF Curriculum Development
IFD Curriculum Adoption
IFE Curriculum Guides and Course Outlines
IIA Instructional Resources and Instructional Materials
IIAD Special Interest Materials

Request for Reconsideration of Instructional Material

Initiated By:_____ Contact info:_____
(Name)

Address:_____

Representing:_____ _____
Self Organization or group (Name)

Material Questioned:

1. Book/Journal/Article

   Drama Script, etc._____
   (Title)
   Author:_____ Publisher:_____
   Copyright Date:_____

2. Other Material:_____

   _____
   (Identify)

Please respond to the following questions: If more space is needed, use an additional sheet of paper.

1. Have you seen or read this material in its entirety?

   _____

2. To what do you object and why: (Please cite passages, pages, etc.)

   _____
   _____
   _____
   _____

3. What do you believe is the main idea of this material?

   _____
   _____

4. What do you believe might result from use of this material?

   _____
   _____

5. What review of this material have you read?

   _____
   _____

6. For what other age group might this material be suitable?

7. What action do you recommend that the district take on this material?

8. What material do you recommend in its place that would provide adequate information on the subject?

Signature Date

PLEASE RETURN THIS FORM TO THE BUILDING PRINCIPAL

Received by principal: Signature Date

School:

Core Instructional Materials Adoption Request

Social Science

Ashland School Board Meeting
September 10, 2026
Presented by Assistant Superintendent Michelle Cuddeback

Why Initiate Now?



Compliance with Schedule

- Reviewing Social Science curricular materials this year ensures compliance with our Division 22 Corrective Action Plan.

Alignment with new Curricular Standards

- Updated materials help ensure Ashland SD continues to provide materials aligned to Oregon Social Science Standards.

Available Funding

- Current funding availability supports acquisition and implementation of new instructional resources effectively.

Commitment to Equity

- Starting now ensures equity, accessibility, and instructional consistency across all student groups.

Board's Role in the Adoption Process

Initiation and Approval

- The school board approves the start of the instructional materials adoption process and defines desired outcomes.

Appointment of Facilitator

- The superintendent appoints a facilitator to oversee and manage the adoption activities effectively.

Review and Final Approval

- The board previews material recommendations and holds final approval authority ensuring alignment with district goals.

Governance and Accountability

- Board involvement promotes transparency, accountability, and community trust throughout the adoption process.

Core Instructional Materials Adoption Process

Board Approves Initiation of Process
Board approves initiation of process and articulates desired outcome (aligned materials by level, independent adoption, etc). Superintendent names process facilitator.

Curriculum Committee Formation
The adoption process begins with forming a curriculum committee setting a vision with clear criteria.

Data Review and Criteria Development
The committee analyzes student data to develop criteria aligned with standards, policies, and equity. Committee presents relevant data, standards, and proposed decision matrix to the board for input.

Instructional Material Review
Materials are reviewed thoroughly, and a budget is prepared for acquisition planning.

Board Review and Adoption
Recommendations are presented for public and board review before final adoption and official notification.

Request to the Board

Initiate the process for core instructional materials review and adoption to ensure compliance with Division 22 Corrective Action Plan

Articulate desired outcome:

- curricular materials at K-5 that contribute to standards alignment and integration across the curriculum.
- Course specific curricular needs aligned to standards.