



Special Board Meeting OF THE BOARD OF DIRECTORS

Thursday, June 18, 2026 - 6:00 PM
Oakdale Middle School Room 230
815 S. Oakdale Ave.
Medford, OR 97501

AGENDA

1. **Call to Order / Pledge of Allegiance / Roll Call**
2. **Agenda Adjustments and Approval**
3. **Citizen Comments**
 - a. *School Board meetings are meetings of the School Board held in public, not meetings with the public. As a general rule, the Board will not engage in discussion with the public during this portion of the meeting. Please rest assured that all comments are carefully considered and will help guide future Board action. When your name is called, come forward to the table and state your name, if you reside in the district, and identify the organization, if any, that you represent. Keep your remarks brief and respect the three-minute time limit. Complaints about staff members cannot be discussed in open session and must be handled through a complaint procedure.*
4. **Consent Agenda**
 - a. Annual Designations for 2026-27 School Year 2
5. **Items for Information and Discussion**
 - a. Strategic Planning Summary and Priorities Next Steps 5
6. **Recess**
7. **Board Action Items**
 - a. FY2026-27 Budget Adoption 30
 - b. Charter School Contract Approval
 - 1) The Valley School of Southern Oregon 196
 - 2) Logos Public Charter School 279
 - c. School Board Policies — *second reading* 418
 - d. Board Officer Elections for 2026-27 School Year 480
 - e. Board Meeting Calendar Approval for 2026-27 School Year 481
 - f. OSEA Contract Ratification 483
8. **Announcements**
 - a. July 25 - Board Retreat — Location TBD
9. **Adjournment**

We welcome all attendees and are here to help accommodate requests for participation. Requests for interpretation, translation services, an interpreter for the hearing impaired, or other accommodations can be made in advance (48 hours) by emailing the [Superintendent's office](#) or by phone at 541-842-3621.



EXECUTIVE SUMMARY

Meeting Date:	June 18, 2026
Agenda Item:	Annual Designations for 2026-27 School Year
Item Type:	Consent Agenda
Administrator:	Brad Earl
Objective:	Approve the annual designations for the 2026-2027 school year

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

Board Organizational Meeting Historical and Other Information:

Legal Counsel

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

Garrett, Hemann, Roberson P.C. (GHR), located in Salem, Oregon, has provided the school district with legal services in the area of employment and labor law, and human resource consultation since January of 2013. In 2022, the district conducted a new Request for Proposal (RFP) process to select an employment and labor attorney. Multiple firms were interviewed at that time and the district selected and renewed its contract with GHR, specifically Rebekah R. Jacobson, to represent the district on employment and labor matters.

The district selected GHR and Rebekah R. Jacobson as its General Counsel in 2026 through an RFP process.

Legal Services for Special Education Matters – The Hungerford Law Firm

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

Bond Counsel – Foster Garvey PC

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

Financial Auditors - Clear Trail CPAs

Kenny Allen, CPA, CFE, Managing Partner and co-founder of Clear Trail CPAs, brings over 25 years of municipal auditing experience. The district has worked with Kenny Allen for over 15 years, most of that time with the firm Pauly, Rogers and Co., P.C. until Kenny opened Clear Trail CPAs. Clear Trail is located in Beaverton, Oregon and specializes in K12 and municipal auditing and accounting.

Depositories for School Funds

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

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

Local Government Investment Pool (LGIP) – Oregon State Treasury

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

Deposit Account – People's Bank of Commerce

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

Comprehensive Insurance Coverage

Property & Casualty for Education (PACE) – Insurance Carrier

The district purchases insurance through PACE, which is the largest property and liability risk pool of school entities in the state, serving more than 200 education organizations. The district has extensive coverage for Educators Liability, Auto, Property, Earthquake, Flood, Equipment Breakdown/Boiler and Machinery, Crime, Cyber Liability and now School Violent Acts Coverage. The district selected Brown & Brown as its liability insurance agent through an RFP process conducted in 2025.

Appoint District Clerk - Superintendent Jeanne Grazioli

Appoint Deputy Clerk - Brad Earl, Budget Officer and Custodian of funds with authorization to sign district checks, make payments, accept quotes and award bids, executive interfund loans and/or cash advances in accordance with ORS 294.660, invest funds, and sign contracts.

Additional Materials: None

Recommendation: Consider approving the annual designations.

Suggested Motion: A formal motion is not required if approved with the consent agenda.



EXECUTIVE SUMMARY

Meeting Date:	June 18, 2026
Agenda Item:	Strategic Planning Summary and Priorities Next Steps
Item Type:	Information
Administrator:	Jeanne Grazioli
Objective:	Strategic plan priorities and next steps

Background:

At the May 21st Board meeting, the Board was provided an overview of the strategic planning process and the resulting vision, mission, and strategic priorities. A strategic plan report is linked below. The purpose of this presentation is to discuss the Board's role in supporting successful implementation.

The presentation will focus on:

- Exploring what resonates most with Board members as district leaders and advocates.
- Discussing the Board's role in championing and communicating the strategic direction of the district.
- Establishing the foundation for Board goals that align with and support the strategic priorities.
- Discussing how the Board would like to monitor progress toward strategic priorities over time.
- Considering meaningful measures and reporting structures that provide transparency, accountability, and evidence of progress.

The Board's leadership, advocacy, and commitment will be essential in bringing the vision, mission, and priorities to life across the district. Draft Board goals and progress-monitoring structures will continue to be refined, with final Board goals anticipated for consideration at the summer Board Retreat.

Additional Materials: [Strategic Plan Report](#)

Recommendation: N/A

Suggested Motion: *Information only. No action required.*



Strategic Plan Report: Medford School District Medford, Oregon

May 2026

Superintendent

Jeanne Grazioli

Table of Contents

Executive Summary.....	3
Current State.....	4
Vision Statement.....	8
Strategic Priorities.....	9
Priorities and Strategies.....	13
Comments and Recommendations.....	15
Appendix A: Data Sources.....	16
Appendix B: Interviews.....	18
Appendix C: Retreat Agenda & Attendees.....	20
Appendix D: Retreat Flip Chart Notes.....	21

Executive Summary

In March 2026, the Medford School District (MSD) initiated a request for services to support the development of a new strategic plan. [Spiro Coaching Institute](#), a bi-coastal consulting firm with offices in Ashland, OR and Greensboro, NC, was hired to facilitate the campaign. The process ran from March to June 2026. You can view [the full timeline here](#).

Project components: August 2025 through April 2026

- August: Begin collecting data and laying the groundwork for strategic planning.
- November-January: Researched and interviewed multiple consultants to assist with the process.
- February: Strategic Planning interest form opened.
- March and April 2026: An extensive literature review of recent and existing community surveys, documents, and strategic principles guiding MSD.
- April 2026: Interviews were conducted with ten (10) key stakeholders representing various parts of the MSD community. Interviews were conducted via video conferencing. A series of structured questions were used for each interview, to maintain consistency in data gathering.
- April 22, 2026: A retreat with 34 key stakeholders was conducted to:
 - Develop a new Vision statement for MSD
 - Review and shape the collected data into strategic Priorities and Strategies.
 - At the retreat, a work group was assigned to each identified strategic Priority and were charged with identifying two primary Strategies that would be most impactful towards the accomplishment of their assigned Priority.
- Final report with recommendations: Compilation of the work into a strategic planning summary report, with recommendations from the consultant.

Current State

MSD encompasses 361 square miles in the heart of Southern Oregon's Rogue River Valley. It serves approximately 13,548 students in 13 elementary schools, one K-8 outdoor school, three middle schools, three high schools, and four charter schools. Within these schools MSD offers three schools of choice: a K-8 outdoor school, a school of arts, and a project-based high school.

MSD currently utilizes the following guiding principles:



Medford SCHOOL DISTRICT LEADERSHIP DEFINITION

In the Medford School District, leadership matters. We aspire to become **ABLE** Leaders:
Acting with Courageous Leadership; **B**uilding Collaborative Relationships; **L**iving Disciplined Character;
 and **E**nsuring High Quality Student Learning. We...

Act with Courageous Leadership:

- Hold students at the center of our work and bring our shared vision to life.
- Act and make decisions that are grounded in evidence, equity, and a relentless pursuit of excellence.
- Thoughtfully challenge the status quo and use courageous conversations, curiosity, and engagement to empower our teams toward a more hopeful tomorrow.
- Inspire students, teams, and each other to continuously improve, and celebrate those improvements.

Build Collaborative Relationships:

- Work to establish and grow trust from all stakeholders by communicating clearly and transparently, listening well, and seeing others.
- Embrace feedback, using it to inform decision-making and improve the system.
- Build shared decisions and drive collaboration by acting as servant leaders, assuming positive intent, and caring for and learning from others.
- Fiercely dedicate ourselves to learning for ALL, and believe that connections between and among our students, employees, families, and community will lead to a more hopeful future.

Live Disciplined Character:

- Model constant personal growth, intentional reflection, and self awareness.
- Welcome the hard work of our roles, approaching tasks and failing forward with grit and a growth mindset.
- Own our decisions, lead and respond with grace, hold ourselves accountable, and are quick to apologize and quicker to forgive.
- Lead with integrity, honesty, empathy, kindness, humility, and joy.

Ensure Quality Student Learning:

- Continually work toward systemic equity and ensure that ALL students are known by name, strength, and need, and then do something about it.
- Possess an unwavering commitment to students and rigorous, data-driven, research-based learning outcomes for ALL.
- Ensure that students own their present and future, listen to their voices, and adapt our systems to best meet their needs.
- Recognize that students are whole human beings with individual needs, and strive to provide an environment that is inclusive, welcoming, compassionate, and hopeful.

Medford SCHOOL DISTRICT | Story of a Student

Our Story of a Student embodies the knowledge and skills our students need to bring their stories to life.

AGENCY
 All students write their own stories.

MSD LEARNERS:

- Seize opportunities and courageously pursue challenges.
- Solve problems with determination and grit.
- Embrace change by boldly taking risks.
- Exercise healthy habits for mind and body to become their best selves.

GROWTH
 All students learn in a place where learning is for all.

MSD LEARNERS:

- Embody curious and creative thinkers.
- Develop deep interests and personal strengths.
- Exhibit a strong work ethic and remain resilient through adversity.
- Innovate utilizing a variety of tools including technology and the arts.

CONNECTION
 All students care about others and actively contribute to their communities.

MSD LEARNERS:

- Communicate effectively through listening, speaking and writing.
- Engage others in a welcoming, respectful, supportive way.
- Demonstrate kindness to others and themselves.
- Care for the community, world and environment.

MSD's current mission is:
 All students graduate with the skills, knowledge, curiosity and drive to
 succeed in a job, trade school, or university.

In assessing the current state of MSD, the following themes emerged:

STRENGTHS:

Strong, Caring Staff Culture

- o Dedicated and professional teachers and staff.
- o Student-centered, hardworking, and motivated by genuine care for kids rather than political agendas.
- o *Opportunity:* This intrinsic motivation is a powerful foundation the new administration can build on by investing in retention and recognition.

Supportive Roles at the School Level

- o Addition of assistant principals and social-emotional advocates at the schools.
- o These roles are making a visible difference in behavior management and student support.
- o *Opportunity:* There is a desire to expand and sustain these types of roles.

Community Partnerships and Family Engagement

- o Utilizing partnerships and efforts to involve parents.
- o Board meeting structure giving classified employees, certified staff, and student body presidents a voice.
- o *Opportunity:* This is an impactful practice worth deepening.

Fiscal Responsibility and Resources

- o Strong financial stewardship and spending meaningfully per student
- o Solid facilities and resources
- o *Opportunity:* The district is well-positioned to be strategic rather than reactive in how it deploys resources.

Curriculum Direction

- o Defining a reading and math curriculum is headed in a good direction.
- o *Opportunity:* There is momentum here to follow through. Investments made can pay dividends if implementation is supported consistently.

Transparency and Inclusive Decision-Making

- o Recent moves toward greater transparency (notably how the superintendent search was handled) and asking for input from employees.
- o *Opportunity*: This is a relatively new cultural shift that can be expanded and institutionalized.

Diverse Program Offerings

- o High school academic opportunities, pathways for career interests, and options like homeschool blends are attractive features that help retain families.
- o *Opportunity*: Building on these programs of choice could be a meaningful enrollment and retention lever.

Vision Statement

The April 22, 2026 retreat participants identified six potential vision statements. The one with far and away the most votes of support was the following:

To lead our MSD community by cultivating innovative thinkers, who are fully prepared as engaged citizens in an ever-changing world.

Strategic Priorities

Utilizing all data gathered for this project, the following opportunities emerged.

OPPORTUNITIES:

Student Behavior & Safety

- o The single most dominant concern across employee surveys, community feedback, and the superintendent search.
- o Staff feel unsafe and unsupported; consistent consequences are lacking.

Trust & Transparency

- o Surfaces in nearly every data source. Transparency scored lowest in district perception ratings (40% "poor").
- o Rebuilding trust is a top expectation for the new superintendent.

Curriculum Dissatisfaction & Micromanagement

- o The district-created flipping books and curriculum guides are widely criticized as burdensome.
- o Staff feel their professional autonomy has been stripped, taking the joy out of teaching.

Staffing Shortages & Workload

- o Understaffing cuts across every role — teachers, classified, custodial, nursing, and Special Education — creating unsustainable workloads and burnout.

Leadership Quality & Visibility

- o Both staff and community members want leaders who are present, approachable, and responsive, not removed or top-down in approach.

Special Education Strain

- o Consistently among the lowest-scoring areas, with high caseloads, inadequate staffing, and lack of clear guidance across all levels.

Student-Centered Focus & Equity

- o The aspirational and consistent thread in the data — every student should be known, challenged, and prepared.

Communication Gaps

- o Between district office, administrators, and building-level staff
- o A recurring frustration across all stakeholder groups.

Fiscal Stewardship & Resource Alignment

- o Concerns about top-heavy administration and misaligned spending, with strong desire to redirect resources to classrooms.

Academic Achievement & Future-Readiness

- o Attendance, literacy, math proficiency, graduation rates, and career readiness are the measurable outcomes the district is accountable for delivering.

ORGANIZED OPPORTUNITIES:

The ten opportunities were then organized into three Priorities, which were reviewed and agreed upon at the April 22, 2026 retreat:

Building Trust & Relationships (Internal & External)

- Communication Gaps
- Curriculum Dissatisfaction & Micromanagement
- Leadership Quality & Visibility
- Trust & Transparency (i.e., Confidence that leaders will be forthright, honest, responsive, and accountable - and their actions will match their words.)

Financial Stability & Sustainability

- Fiscal Stewardship & Resource Alignment
- Staffing Shortages & Workload
- Strain on Special Education

Student Achievement Gaps

- Academic Achievement & Future-Readiness
- Student Behavior & “Safety” (student wellbeing/safe student behavior)
- Student-Centered Focus, Retention, & Equity

A few observations worth noting:

- Building Trust & Relationships holds the most themes (4), reflecting that the district's most urgent and widespread challenge is relational and cultural — not just operational
- Student Behavior & Safety could reasonably sit under *both* the Trust and Achievement headers, as it undermines both staff morale and student learning simultaneously

- Staffing Shortages also bridges both Financial and Trust categories, since inadequate staffing erodes both fiscal efficiency and staff confidence in district priorities

Utilizing the findings above, retreat participants identified primary strategies that would have the biggest impact for MSD – see next page:

Priorities and Strategies

Priority #1: Building Trust & Relationships

Strategy #1: Craft a model of clear communication and feedback that can be used widely and across MSD (e.g. the 360° communication loop model)

To Do:

- Identify person/group to lead this Strategy
- Develop Action Steps

Strategy #2: Clarity in expectations (tight and loose) for district alignment

To Do:

- Identify person/group to lead this Strategy
- Develop Action Steps

Priority #2: Financial Stability & Sustainability

Strategy #1: Develop and sustain a world-class recruitment, onboarding, and retention strategy

To Do:

- Identify person/group to lead this Strategy
- Develop Action Steps

Strategy #2: Engage our community to re-imagine a sustainable and highly effective public education system in MSD.

To Do:

- Identify person/group to lead this Strategy
- Develop Action Steps

Priority #3: Student Achievement Gaps

Strategy #1: Increase attendance by aligning with parent/family value, knowing each and every learner, and having a system to identify, support, and address barriers.

To Do:

- Identify person/group to lead this Strategy
- Develop Action Steps

Strategy #2: Ongoing professional development/training

- For all staff
- An instructional model (scaffolding, assessment, and differentiation)
- Clear expectations with accountability

To Do:

- Identify person/group to lead this Strategy
- Develop Action Steps

Comments and Recommendations

MSD has made a very strong start in developing their new strategic plan. Superintendent Jeanne Grazioli began this process with the goal of focusing on fewer things and doing them better. In the process, the community had created a new Vision statement, as well as the targeted, strategic Priorities, each with two bold yet realistic strategies. Of course, more work needs to be done. It is suggested that MSD focus on the following next steps:

Socialize the newly created Vision statement, Priorities, and Strategies with key community stakeholders for their feedback.

Constituents to consider may include:

- o Interviewees for this project
- o Retreat attendees
- o Staff and student leaders
- o School Board

Identify and convene team leaders and groups to develop:

- o Develop Action Steps for each Strategy.
- o Develop a high-level financial model linking strategic priorities with the resources needed. *Note: A sample template is on the next page.*
- o Develop a presentation to be used with internal and external constituents.

Develop an MSD decision-making rubric, incorporating the Vision:

- o Share it openly to enhance transparency of how key decisions are being made.
- o Utilize it to make important decisions in implementing the Strategic Plan.

Acknowledge and formalize accountability:

- o Identify how people will be held accountable for the implementation of the plan – both the administration and other involved constituents.
- o Share progress transparently.

Appendix A: Data Sources

MSD provided the following [data](#) as relevant sources of academic and perceptions data collected from a wide array of community stakeholders. ODE academic data offered an overview of district demographics, student success rates, and state goals for 13,548 students, 708 teachers, and 377 staff members. Additional input came from the YouthTruth Survey (4,843 students and 2,486 parents), the Employee Experience Survey (993 employees), the Superintendent Search Survey (287 respondents), the Voices of the District Survey, 10 stakeholder interviews conducted by Spiro, and the Superintendent Student Advisory Committee (13 students). Together, these sources represent approximately 4,884 student responses, 2,613 parent responses, and 1,174 staff responses.

Sources of Existing Data:

- ABLE Leadership
- Current Vision & Values for MSD
- Employee Experience Results
- Employee Job Satisfaction
- Employee Experience Weighted Averages - MSD Staff Experience 10.25
- Leadership Definition - Feedback Working Doc
- Medford School District Youth-Truth Insights Deck 25-26
- Medford Survey Report Superintendent Search Data
- MSD-Profile-At-A-Glance
- Priorities - Summary of Feedback from Administrative Leadership
- Story of a Student/Feedback Working Docs from Leadership
- Superintendent Search Medford Survey Report
- Superintendent Qualities and Characteristics
- Superintendent Student Advisory Group
- Themes From Employee Survey Comments Section

Interviews:

Additionally, the consultant interviewed 10 key constituents, to gather more detailed vantage points. Interviewees included:

Interviewee 1	Parent, active community member
Interviewee 2	Versatile Educator and Administrator
Interviewee 3	BlendEd Teacher, Innovation Academy
Interviewee 4	Employee, Community Member
Interviewee 5	Elementary Teacher
Interviewee 6	Teaching & Learning Facilitator
Interviewee 7	School Counselor
Interviewee 8	Elementary Principal
Interviewee 9	High School Special Education Assistant
Interviewee 10	Special Education ERC

Appendix B: Interviews

Questions Used:

Name:

Role:

How long have you been affiliated with MSD:

1. What is working well in the Medford School District that the administration should leverage further?
2. From your perspective, what information would you like the new administration to know?
3. [Jack and the Beanstalk question] If you had three magic beans and could give them to the superintendent to apply to the Medford School District, how you advise she use each one?
4. In your perception of the Medford School District, what would you recommend they Continue doing? Stop doing? Start doing?
5. Looking back three years from now, if you were incredibly proud of what has been accomplished in the Medford School District, what might you be bragging about?
6. Anything else that would be useful for me to know?

Themes from Interviews:

Staff-Administration Trust Deficit & Communication Gaps

This was the most pervasive concern across nearly every interview. Teachers and classified staff feel a significant "chasm" between themselves and district leadership — voiceless, distrusted, and left out of curriculum and decision-making. Multiple respondents called for more visible leadership presence in schools, clearer communication channels, and genuine inclusion of classified employees in district-level conversations.

Student Behavior, Mental Health & Social-Emotional Support

Interviewees across roles — parents, teachers, counselors — flagged student behavior as a major drain on learning environments. There's strong consensus that consistent, early, and well-resourced social-emotional learning (SEL) supports are needed at all levels, particularly in elementary school. One interviewee specifically called for measurable mental health outcomes as a 3-year success benchmark.

Staff Retention, Morale & Wellbeing

High turnover — of teachers, counselors, and administrators — came up repeatedly as both a symptom and a cause of instability. Respondents want MSD to become an "employer of choice," with better recognition (big and small tokens of appreciation), competitive salaries, and leadership that celebrates staff. Lastly, there was a theme of being able to ask for help without fear of retribution.

Academic Quality, Curriculum Consistency & Educational Model

There is tension between the pace of curriculum changes and their actual implementation quality. Several interviewees questioned the 100-year-old educational model and called for a more modern approach — slowing down early learning, increasing rigor in middle school, improving literacy and numeracy instruction, and reducing over-reliance on technology (e.g., Chromebooks). Consistent alignment between classroom instruction and assessments was also flagged.

Enrollment Decline, Family Retention & Community Partnerships

Multiple respondents raised concern about families leaving the district and not being re-engaged. Suggestions included expanding programs of choice, proactively reaching out to families who left, and deepening partnerships with local businesses, employers, and civic organizations to make MSD more attractive. Safety concerns and school quality perceptions were cited as reasons families exit.

Appendix C: Retreat Agenda & Attendees

Medford School District - Strategic Planning Meeting April 22, 2026

AGENDA

Time	Activity
8:00-8:30am	Arrive, breakfast refreshments, get settled in
8:30-8:40am	Welcome & Overview/Purpose for the Day, Introduce Facilitator Jeanne Grazioli and Rob Kramer
8:40-9:45am	MSD Vision Creation
9:45-9:55am	Transition
9:55-10:30am	Complete MSD Vision Creation
10:30-10:45am	BREAK
10:45-11:45am	Develop Strategic Plan Goals & Initiatives – part 1
11:45-12:25pm	LUNCH
12:45-1:20pm	Develop Strategic Plan Goals & Initiatives – part 2
1:20-1:35pm	BREAK
1:35-2:45pm	Develop Strategic Plan Goals & Initiatives – part 3
2:45-3:00pm	Next Steps, Closing Comments, Adjourn

Attendees:

49 attendees were invited to participate in a full day of strategic planning. Out of those invited, 34 stakeholders attended the planning day. The 34 attendees are comprised of 9 self-identified parents, 14 staff members, 16 administrators, eight self-identified community members, and one self-identified Medford Business / Community Partner. Unions were also represented that day as MEA and OSEA leadership were in attendance. Lastly, the MSD School Board was represented with one Board Director in attendance.

Appendix D: Retreat Flip Chart Notes

Strategic Planning Day Notes Vision, Priorities, and Strategies

MSD Vision: “To lead our MSD community by cultivating innovative thinkers, who are fully prepared as engaged citizens in an ever-changing world.”

Future Questions:

- ***It's 2036. What is MSD known for that it isn't in 2026?***
 - “Innovative, developmentally appropriate instructional design with experience-based learning”
 - “Student engagement that increases attendance, academics, and provides purpose for learning.”
 - “A nimble system that responds to the changing needs of students”
- ***What exists in 2036 because MSD stopped operating in self-limiting ways?***
 - “Having the willingness to change.”
 - “Focusing on the individual rather than standards/grouping.”
 - “More fluid and engaging collaboration”
- ***In 2036, the best teachers in the country are choosing to come to work in MSD. Why?***
 - “Strong culture and climate - human-centered - part of decision-making.”
 - “Focus on professional growth and support.”
 - “Teaching and learning grounded in research-based best practices.”

Primary Strategies:

- **Building Trust & Relationships**
 - Craft a model of clear communication and feedback (i.e., the 360 model)
 - Communication loop
 - Clarity in expectations (tight & loose) for district alignment
- **Financial stability & Sustainability**
 - Develop and sustain world-class recruitment, onboarding, and retention
 - Engage our community to reimagine a sustainable and highly effective public education system in MSD
- **Student Achievement Gaps**
 - Attendance (Get 'em here!)
 - Parent/Family Value
 - Know each & every learner
 - Systems to identify, support, and address barriers
 - Professional Development / Training (Skills of Adults)
 - All staff (ongoing)
 - Instructional model (scaffolding, assessment, elements of UDL)
 - Differentiated
 - Brain Science / Developmentally Appropriate
 - Clear expectations with accountability

Priorities and Strategies:

Where do we see ourselves going (developing, accomplishing, changing) in the next 1-3 years? How and in what ways can we move forward? What are the primary things we could do? (bold/specific/realistic)

Table 1

Improve Communication/Transparency

- Common Communication Platform for Family Communication (i.e., Parent Square)
 - Improve Communication
 - District Office to staff... but how?

Safety/Behavior

- Expedited, appropriate placements
- A return of consequences
- Clear expectations
- Engagement / developmentally-appropriate practices/curriculum
- Funding / \$
- Being efficient with resources, staffing, and systems

Table 2

Building Trust + Relationships

- Settling contracts
- Strategic focus/risk-taking (middle school family engagement)
- Ensure feedback loops on decision-making

Financial Sustainability + Stability

- “Right-size”

Student Achievement Gaps

- Plan to close gaps

Table 3

More PD Dedicated Trainings

- Planned PD Plan > Teaching Interventions
- Focus on “How” we’re teaching

Clear Communication Expectations

- In Buildings > Can Predict

Completely Redesign SPED

- Research where it's working?

Alignment & Autonomy are related to in silos (use data)

- More Parent Involvement
- Higher Attendance
- More and reallocate resources to student supports

Table 4

Thinking creatively about how we use the money and resources we have

- 4-day school week
- Staffing
- Remote work for some staff
- Consolidate schools

Every school builds relationships with community partners

- Families as an avenue for community building
- Creating an Advocacy group for SPED/student services resources (put pressure on the state to provide funding/support)
- Work with local agencies to provide more mental health services for students
- Schools as community hubs
- Quality teacher retention committee (educator/staff)
- Districtwide / school site
 - Book studies

Table 5

SPED: Staff Members

- Shared Leadership
 - Staff who are experts
- Training & Support
 - Meaningful & focused
 - With resources
 - Manageable caseloads

Leadership Quality & Visibility

- Include staff in decision-making
- Multi-tiered meetings
 - Email communication
 - Active collaboration

Communication

- Encourage all relevant voices
- Feedback loop

Table 6

- Problem-solving committees with all stakeholders
- Clear communication about systems and feedback loops
- Professional development opportunities - specifically for classified staff
- Community + Parent engagement
- State-level advocacy for funding priorities
- Language equity with staff > not just teachers - educators includes all staff



EXECUTIVE SUMMARY

Meeting Date:	June 18, 2026
Agenda Item:	FY 2026-27 Budget Adoption
Item Type:	Action Item
Administrator:	Brad Earl
Objective:	Adopt the budget, appropriate funds and impose taxes

Background: The Budget Committee approved the Proposed Budget as presented on May 14, 2026. School districts in Oregon must have an Adopted Budget by June 30 every year. The State of Oregon is in year two of the 2025-27 biennial budget and has reaffirmed their commitment to the state approved state school fund level of \$11.4 Billion, of which 49% was allocated in 2025-26 and 51% will be allocated in 2026-27. Enrollment continues to decrease due to low birth rates and very slow in-migration of people to the state and region.

A budget hearing was conducted by the Board on June 11, 2026.

We are seeking an adoption of the FY 2026-27 budget at the meeting tonight. There are three actions necessary to do so.

- 1) Approve the Resolution to adopt the budget
- 2) Approve the Resolution to appropriate funds
- 3) Approve the Resolution to impose and categorize taxes

Each of these resolution documents are included in the Board packet.

Additional Materials: [Resolution Adopting the FY2026-27 Budget](#); [Resolution Making Appropriations for the FY2026-27 Budget](#); [Resolution to Impose and Categorize Taxes](#)

Recommendation: Review the resolutions and vote on each resolution separately.

Suggested Motions:

- 1) *"I move to approve the Resolution Adopting the 2026-27 Budget as presented."*
- 2) *"I move to approve the Resolution Making Appropriations for the 2026-27 Budget as presented."*
- 3) *"I move to approve the Resolution to Impose and Categorize Taxes as presented."*

APPROVED BUDGET

2026-2027



Medford
SCHOOL DISTRICT

Fiscal Year 2026-27

BUDGET COMMITTEE

School Board Members

Lilia Caballero
Kendell Ferguson (*Chair*)
Erik Johnsen
Sandra LaNier McHenry (*Vice Chair*)
Sunny Spicer
Michael Williams
Angela Zbikowski

Community Members

Lupe Murillo (*Position 1*)
Amanda Olson (*Position 2*) (*Chair*)
Casey Stine (*Position 3*)
Christy Clark (*Position 4*)
Ilex Brandenberger (*Position 5*) (*Vice Chair*)
Vacant (*Position 6*)
Brooke Lazzari (*Position 7*)

District Administration

Jeanne Grazioli, Superintendent
Brad Earl, Assistant Superintendent of Operations

Introduction

Message from the Superintendent.....	i
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Organization

District Overview	1
School Board Strategic Governance	2
Budget Presentation and Process	2

Financial

All District Funds	6
General Fund	7

Fund Balance Projection	7
Resources and Requirements Summary.....	8
Resource Summary	9
Source Detail – Local, Intermediate and State	10-11
Resident Average Daily Membership (ADMr)	12
Source Detail – Federal and Other	13
Source Detail - Beginning Fund Balance	14
Expenditures Summary, Salary and Wage Summary.....	16
Staffing Summary	17
Expenditure Summaries – Benefits, Purchased Svcs, Supplies, Capital Outlay	22
Expenditures by Classification and Student Instruction.....	28
Special Education Spending Summary	29
Music Programs Spending Summary	31
Function Detail	33

Special Revenue Fund

Summary	105
Federal Programs	106
State and Local Programs	109
PERS Reserves	110
PEEK Grant	111
Secondary Athletic Fund.....	112
Food Service Fund.....	113
Seismic Upgrades Grant.....	114
Project Reserve Fund – Capital, NTS, Curriculum	115
NMHS Gym Rebuild	120
Chromebook Reserve.....	121
Measure 98.....	122
Measure 99.....	123
Literacy Grant	124
Student Investment Account (SIA)	125
Elementary and Secondary School Emergency Relief Funds (ESSER)	127

Other Funds

Summary	128
Debt Service Fund – General Obligation Bonds	129
Debt Service Fund – Pension Obligation Bonds	130
Debt Service Fund – Full Faith Credit Bonds	131
Capital Projects Fund Oakdale Remodel.....	132
Capital Projects Fund (Madrone Trail)	133
Health Insurance Fund	134
Student Scholarships Fund.....	135
Student Body Fund	136

Supplemental Information

Revenue Sources	137
Glossary	139
Resolutions	
ED-1	
Affidavit	

Introduction



Dear Medford School District Community,

As we continue our commitment to transparency and responsible stewardship of public resources, I want to provide an overview of how our schools are funded, the financial challenges we are facing, and the steps we are taking to ensure long-term stability while maintaining a high-quality education for our students.

Even amid the challenges in public education, I am continually inspired by the dedication of our teachers and staff. Each time I visit our schools and departments, I see individuals deeply committed to supporting students and improving learning in meaningful ways. I am truly grateful for their work. I also want to extend my appreciation to our budget committee for the time and care they have given to ensuring our plan reflects our shared priorities.

Oregon's school funding system is complex and influenced by factors at the state, local, and federal levels. Understanding this broader context is important as we navigate the decisions ahead.

How Oregon Schools Are Funded

Oregon public school funding is primarily driven by the state's General Fund, totaling roughly \$12.95 billion for the 2025–27 biennium. In summary, we rely on the following sources to provide a high-quality education:

- **State School Fund (SSF):** The largest source (\$11.4 billion), made up of state income taxes and a portion of local property taxes.
- **State Grants:** Including the Student Investment Account (SIA), High School Success (HSS), and other targeted or time-limited grants (e.g., literacy, multilingual learners).
- **Local Revenue:** Primarily property taxes. These are equalized through the SSF. When local collections are higher, state support is reduced, and vice versa.
- **Federal Funding:** Typically about 5%-10% of district budgets, including Title programs, IDEA, ESEA, and nutrition services.

Financial Outlook

We are preparing for significant financial headwinds in the 2027–29 biennium and likely beyond.

Across Oregon, many districts have already made substantial cuts, with others implementing mid-year reductions or planning deeper cuts next year. A small number are even facing solvency concerns. Like all districts, Medford is proposing spending reductions this year and anticipating further adjustments in the next biennium. However, our reductions are proportionally smaller than many of our peers, reflecting both disciplined fiscal management and some key strategic decisions over the past several years.

Between 2020 and 2024, Oregon districts received approximately \$1.62 billion in federal ESSER funds. While some districts used these funds to maintain staffing levels despite declining enrollment, we focused primarily on one-time investments: facility improvements, classroom upgrades, and targeted staffing to address post-pandemic learning loss and special

education needs. We also built a plan to phase out or transition those positions before the funding expired in September 2024, helping us avoid the abrupt “funding cliff” others are now experiencing.

Another factor affecting districts statewide has been Pension Obligation Bonds (POBs). While some districts benefited from investment gains that temporarily offset rising PERS costs, the maturation of those bonds has created significant new expenses; some in the tens of millions of dollars. Medford’s experience was different. Our 2007 POB strategy was impacted by the 2008 recession, limiting long-term savings and, as a result, we are not experiencing the same sudden cost increases. Our final POB payment will occur in the 2026–27 fiscal year.

At the same time, broader economic and demographic pressures are intensifying. Oregon now has more residents over age 65 than school-aged children, a reversal from just 20 years ago. Increased demand for healthcare, potential new transportation funding needs, and anticipated reductions in federal funding are all placing additional strain on the state budget. The Governor has estimated that federal funding reductions associated with HR1 could total approximately \$15 billion over five years. It is likely the state will need to redirect resources to partially offset losses in areas such as healthcare and food assistance, limiting the ability to increase K–12 funding.

Locally, we are also experiencing key trends:

- **Declining enrollment:** Our non-charter enrollment has declined by nearly 10% since 2020, with projections indicating continued decline over the next 20 years.
- **Rising special education needs:** Special education enrollment now exceeds 17% of our student population, while state funding remains capped at 11%. This gap creates ongoing financial pressure, as these services are essential but more costly to provide.

Medford School District 2026–27 Budget

Our proposed budget reflects a balanced approach; aligning ongoing revenue with ongoing expenses while making targeted, one-time investments in safety and infrastructure.

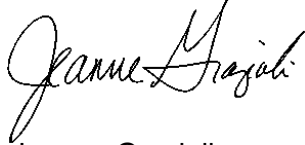
- Total revenue is projected to increase by \$5.20 million (2.6%).
- We are proposing a one-time deficit spend of \$2.05 million, primarily for safety-related facility improvements, including wood ceiling truss inspections/repairs and facility upgrades for special education needs.
- This will reduce our General Fund balance to approximately 8%, but keeps us above the minimum 5% as required by Board policy DBDB.

To maintain long-term financial stability, the budget includes approximately \$3 million in ongoing reductions, primarily through staffing adjustments. In total, we are proposing a net reduction of 20 FTE. This includes adding 17 FTE in special education to meet growing student needs, while reducing 37 FTE across licensed, administrative and classified roles. Most of these reductions are being achieved through attrition, internal transfers and/or placement. While these decisions are difficult, they are necessary to ensure the district remains financially stable and able to serve students effectively over time.

We have already begun consolidating district office space to reduce lease costs and are proposing a reduction in contracted services. As we look ahead, we will also need to carefully evaluate our overall facilities footprint in relation to long-term enrollment trends to ensure we are using our resources efficiently while sustaining high-quality programs across the district.

We recognize these are not easy conversations, and we are committed to approaching them thoughtfully and transparently. Thank you for your continued support of Medford schools. We remain committed to making thoughtful, student-centered decisions and to keeping our community informed as we move forward together.

With appreciation,

A handwritten signature in black ink, reading "Jeanne Grazioli". The signature is fluid and cursive, with the first name "Jeanne" written in a larger, more prominent script than the last name "Grazioli".

Jeanne Grazioli
Superintendent

Organization

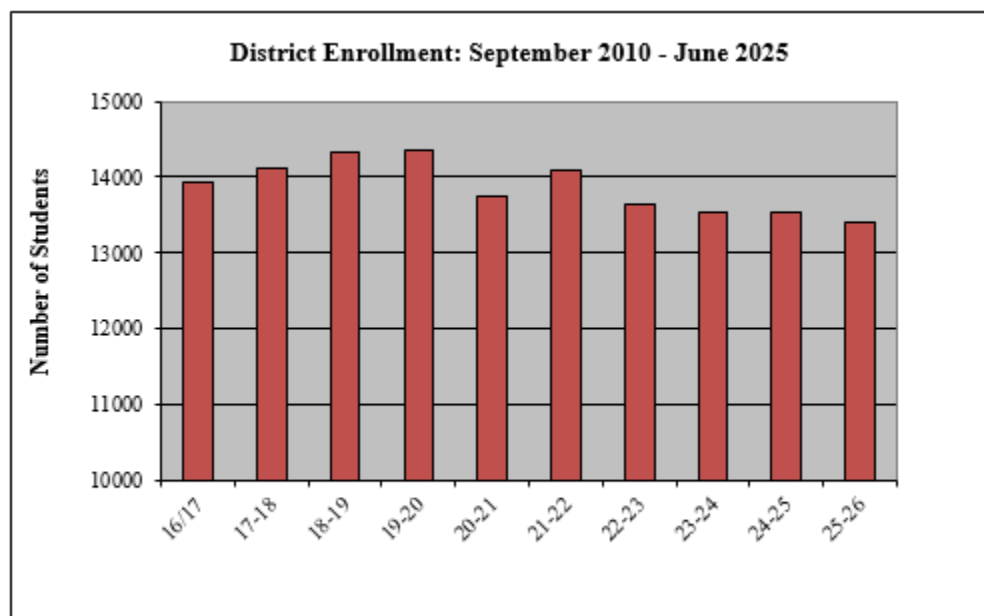


District Overview

Jackson County School District No. 549C, also known as the Medford School District (The District), is the eighth largest in Oregon. Serving approximately 13,397 students, the District enrolls approximately two percent of the total K-12 student population within the state.

The District, formed in 1959, is located in Jackson County and includes most of the City of Medford, the City of Jacksonville, portions of the City of Central Point, and unincorporated areas of the county. Situated in the Rogue River Valley, the District extends beyond the City of Medford’s urban growth boundary and encompasses approximately 361 square miles.

The District operates two comprehensive high schools, three middle schools, 13 elementary schools, one K-8 School, one alternative high school, and four charter schools. Historical and projected enrollments are shown below:



The City of Medford, City of Jacksonville, Ruch, and Jackson County are key partners with the Medford School District. These communities embrace their schools. Businesses, parents and other volunteers generously offer their time and resources to help students. Parks, recreation, after-school and summer programs are provided for children. In addition, citizens of all ages have access to libraries, community centers, parks, educational, social and recreational opportunities.

Professionally advanced police and fire departments provide comprehensive emergency response services to residents. The District has a close and unique partnership with the Medford Police Department, which provides security, training, and consultation to all campuses.

School Board Strategic Governance

The Medford School Board recognizes that it has a unique and important role to play in assuring that the school system achieves the results expected by the community and deserved by students. In addition, the board and staff understand the significance of fiscal integrity and accountability. The Board accepts the challenge to perform its own duties with the same degree of excellence expected of the Superintendent and all staff members.

Budget Presentation and Process

Each year, the District prepares a budget according to Oregon budget law and School Board policy. At the center of budget development are the school board mission, values, goals, and guiding principles. The primary objective is to present budget information in a manner that provides a clear and accurate account of the District's financial position, educational programs, and services for the coming fiscal year.

The budget acts as a business and operating plan for the fiscal year, and is revised as necessary. Budgets are presented on the modified accrual basis of accounting for all governmental funds. This is consistent with Generally Accepted Accounting Principles (GAAP). A balanced budget by fund is required. Unencumbered annual appropriations lapse at the end of each fiscal year.

The budget is designed to help ensure fiscal transparency, efficiency, effectiveness and integrity. The Business Department and administration continually monitor all budgeted accounts and establish internal controls over all expenditures.

The budget is adopted by the School Board, appropriations are made, and the tax levy is declared no later than June 30. The process includes planning, feedback, preparation, approval (by the Budget Committee), adoption (by the Board), implementation, evaluation and monitoring, and finally, auditing at the conclusion of the budget cycle.

FY26-27 Budget Calendar

**Thursday
April 9, 2026**

Budget Committee Orientation during the Board Meeting at Oakdale

**Thursday
April 30, 2026**

1st Budget Committee Meeting at Oakdale– Committee elects officers, Superintendent delivers budget message and committee receives budget document.

**Thursday
May 14, 2026**

2nd Budget Committee Meeting at Oakdale – Public comment, committee discusses and approves Proposed Budget. Budget chair signs resolutions.

**Thursday
June 4, 2026**

3rd Budget Committee Meeting at Oakdale– If needed

Thursday June 11, 2026	Board Meeting. Public Budget Hearing on FY26-27 Budget* - at Oakdale Deliberate on budget approved by budget committee and considers additional public comment.
Thursday June 25, 2026	Board Meeting; FY26-27 Budget Adoption* - at Oakdale Board enacts resolutions adopting the budget, makes appropriations, imposes and categorizes tax levy.
June 30, 2026	District must submit balanced budget by this date.
July 30, 2026	District submits required budget documents to County Assessor, Department of Education, and Southern Oregon Education Service District by July 15, 2026.

*Budget Committee members are invited but not required to attend.

Publishing must be done either twice in the newspaper, 5-30 days before meeting, OR **on website at least 10 days before the meeting AND printing once in the newspaper 5-30 days before the meeting.

Medford School District List of Acronyms

ADM: Average Daily Membership	JDEP: Juvenile Detention Ed Program
B2B: Barriers 2 Bridges	KG: Kindergarten
COLA: Cost Of Living Adjustment	MEA: Medford Education Association
CTE: Career and Technical Education	NTS: Network & Telecomm. Services
ECSE: Early Child Special Education	ODE: Oregon Department of Education
ELL: English Language Learners	PEEK: Physical Education Expansion
ESD: Education Service District	PERS: Public Employee Retirement System
ESS: Educational Support Staff	SECC: Special Education Child Count
FAPE: Free Appropriate Public Education	SIA: Student Investment Account
FTE: Full Time Equivalency	SOESD: So Or Education Service District
GASB: Government Accounting Standards Board	SpEd: Special Education
GF: General Fund	SR: Special Revenue Fund
IDEA: Individuals with Disabilities Education Act	SSF: State School Fund
IEP: Individualized Education Program	TOSA: Teacher On Special Assignment
IMC: Instructional Media Center	

Financial Pages

Financial

NOTE: As with any budget, the development of this budget involves using estimates and making assumptions. Ultimately, the District understands that some of these assumptions may be required to be collectively bargained, and as such, readers of this document should understand that some of these assumptions may change. Some key assumptions include, but are limited to, \$11.359 billion for the 2025-27 Oregon K-12 budget, high cost sped to be reimbursed at a minimum of 20-25%, SLA funded at Continuing Service Level Estimate, a 4.25% Cost of living Adjustment (COLA) for all employees; step wage increases for those employees who qualify, and purchasing healthcare from the Oregon Educators Benefit Board (OEBB) for the full fiscal year.

There have not been any changes financially between the Approved Budget and the Proposed Budget.



All District Funds

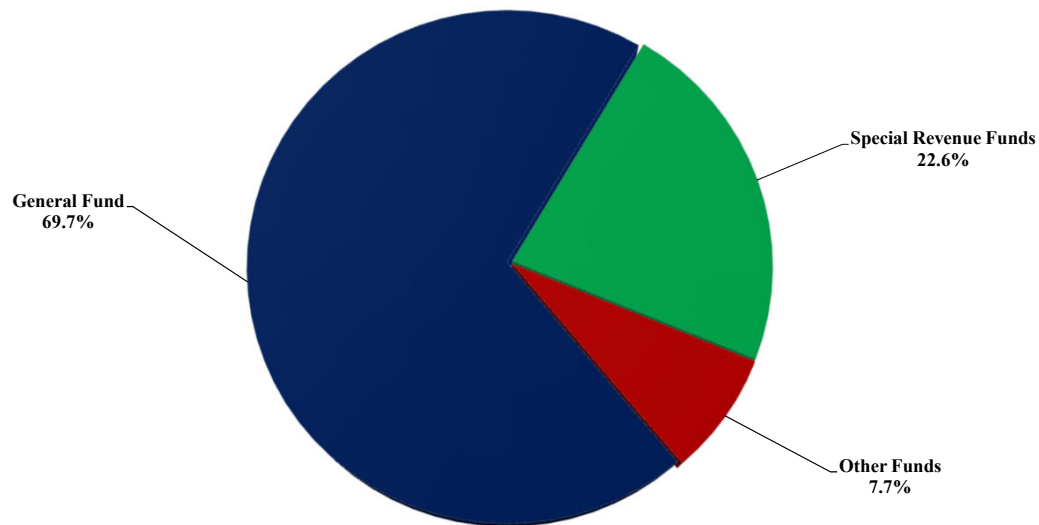
All Active District Funds

Special Revenue Funds:

Federal Programs
 State and local Programs
 PERS Reserves
 Physical Education Expansion Grant
 Secondary Athletics
 Food Service Operations
 Seismic Upgrade Grant
 Project Reserves
 Measure 98 High School Success
 Measure 99 Outdoor School
 Chromebook Reserves
 Student Investment Account (SIA)
 Literacy Grant
 NMHS Gym

Other Funds:

Debt Service - General Obligation Bonds
 Debt Service - Pension Obligation Bonds
 Debt Service - MSDEC Remodel
 Capitan Projects Fund - GO Bonds
 Student Scholarship Fund
 Student Body Fund



The General Fund is the primary funding source for operational spending in the District. In the FY26-27 Budget, the General Fund represents 69.7% of all resources versus 71.1% in the FY25-26 Amended Budget. Total resources across all fund types for FY26-27 is \$319.1M vs \$312.1M in the FY25-26 Amended Budget, which is 7.0M, or 2.3% higher. This increase is primarily due to the \$7.32M increase in Special Revenue Funds (p.105) primarily driven by the \$16.3M increase in NMHS gym construction which is paid for by insurance proceeds. The gym spending increase is partially offset by lower project reserves funding/spending and no plans for a seismic upgrade project in 2026-27. The current year 2025-26 project reserves budget included \$3.3M for SMHS track and field upgrade and carryover of over \$3.0M from 2023-24 Innovation Academy (IA) facility upgrades completed in the summer of 2025.

General Fund - Fund Balance Roll Forward

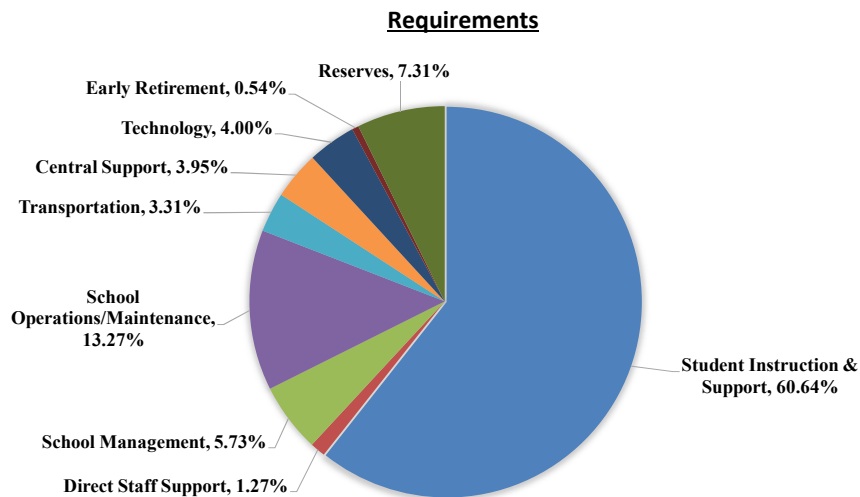
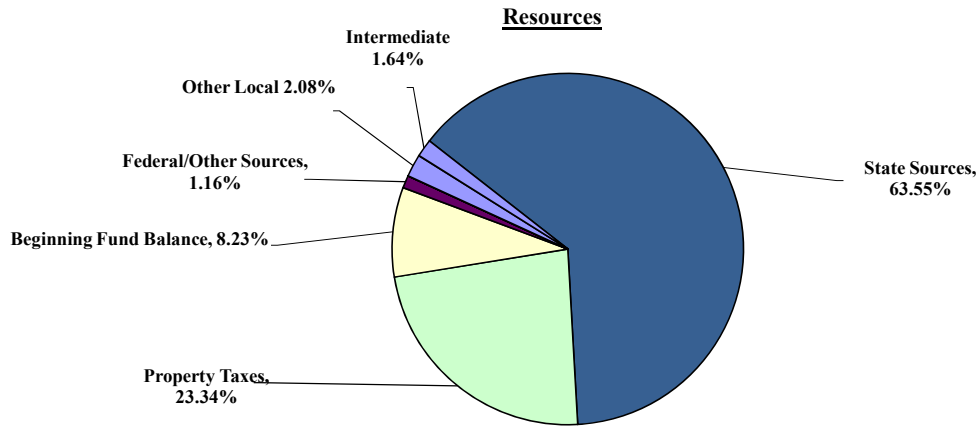
FY26-27	
Projection	
(\$ Thousands)	
Beginning Fund Balance	\$ 18,301
1. Previous Annual Surplus/(Deficit)	(4,758)
2. Change in Revenue	5,202
3. Change in Transfers In & Other Sources	-
4. Change in Salary & Wages	(2,083)
5. Change in Associated Payroll Costs	(1,358)
6. Change in Purchased Services	(1,768)
7. Change in Supplies and Materials	(476)
8. Change in Capital Outlay	10
9. Change in Other Objects	(279)
10. Change in Transfers Out/Other Uses	3,460
11. Total Annual Surplus/(Deficit)	(2,050)
12. Ending Fund Balance	\$ 16,251

In the General Fund, Fund Balance projection above for FY26-27, the District is proposing to deficit spend \$2.05M (line 11). Revenue and Transfers In is \$204.15M (p.9), are exceed by Expenditures and Transfers Out, which are \$206.20M (p.15). Descriptions of the major year over year changes in the FY26-27 budget are summarized in the schedule above and the words below.

1. The General Fund previous year FY25-26 forecast is to deficit spend \$4.758M as of the latest FY25-26 budget amendment, driven primarily by \$3.3M for SMHS Track and Field upgrade, \$1.208M for wood truss inspections and repairs and \$0.25M for one-time movement of staff out of Biddle office building.
2. Total revenue (resources minus transfers in and beginning fund balance) is estimated to increase \$5.2M or 2.6% over prior budget.
3. There will not be a change in transfers in from other funds and other income from FY25-26 to FY26-27. Transfers In includes \$0.55M from the PERS reserves fund, and other income of \$1.3M from GASB 96 and \$0.6M from GASB 87 Leases.
4. Total General Fund salaries and wages are up \$2.08M or 2.4% to \$87.24M from \$85.15M in the prior year. The primary drivers of the \$2.15M increase are: \$3.40M for a 4.25% COLA increase and \$1.24M for step increases. There is a reduction of -\$1.71M, for -20.13 FTE for staffing changes, -19.55 of which are in the General Fund. We assume a vacancy savings of -\$0.77M, and all other salary and wages changes net to -\$0.08M. See page 18 for a detailed explanation on staffing changes for all funds.
5. Total General Fund Associated Payroll Costs are up \$1.36M or 2.6% to \$53.21M from \$51.86M in the prior year. There is a \$2.03M increase from the associated payroll costs on COLA and STEP wage increases. Other changes include an increase of \$0.49M for Unemployment and \$0.27M for healthcare. These increases are partially offset by a -\$1.02M savings from FTE reductions, -\$0.29M savings on the vacancy assumption and all other changes total a savings of -\$0.12M.
6. Total General Fund Purchased Services are up \$1.77M or 4.1% to \$44.9M from \$43.1M in the prior year. This is due to an increase in charter school pass through payments of \$0.84M, an increase in utilities of \$0.17M and an increase in pupil transportation of \$0.23. There is a decrease in Professional Services Non-Instruction of -\$0.24M, which is mainly due to the decrease in the Vitality benefits app. There is an increase in Professional and Technical Instructional Services of \$0.1M for the Foster Grandparent Program (in function 1111), \$0.15M to cover increased speech eligibility services (function 2150), and an increase of \$0.165M for 3 contracted skilled trainers (function 1240). The District contracts with Presence Learning for online speech and language services. This amount is highly variable and dependent on the number of available SLP's for hire. Repairs and maintenance has an increase of \$0.22M based on prior year numbers and contractor price escalation. The remaining variance is due to the ever-increasing substitute usage in our district (an increase of \$0.23M).
7. Supplies have increased a total of \$0.48M or 6.5% from the prior year due primarily to an increase in computer software and hardware. Hardware is up \$0.08M due to the cost of equipment continuing to rise as well as more technology being added to the classrooms. Software has an increase of \$0.176M for English Language Learners due to replacing Rosetta Stone with Duo lingo. There are also renewals for Flashlight360 and ELLevation. Software has also increased a total of \$0.36M or 13.5%. Additionally, the cost of digital and physical materials are outpacing inflation.
8. Total General Fund Capital Outlay costs are down -\$0.01M or -0.44%.
9. Other Objects is up \$0.28M or 13.9% due primarily to an estimated 20% increase in property insurance and a 10% increase in liability insurance.
10. Total General Fund Transfers Out to Other Funds is down -\$3.46M, or -28.9% due primarily to a \$3.10 M reduced transfer to the projects reserve fund. The General Fund is budgeting to transfer a total of \$8.488M, which will be distributed as follows: \$5.178M to the project reserve fund (p. 115) to fund Curriculum, Capital Maintenance and Repairs and IT infrastructure, \$0.575M to Special Revenue Secondary Athletics (p.112), \$0.29M to partially fund the Physical Education Expansion (PEEK) (p.111), \$0.025M for State and Local Programs (p. 109), \$1.25M for Chromebook Reserves fund (p.121), and \$1.17M to Debt Service (p.131). The detail of where these transfers are sent to can be found in the green Special Revenue section starting on page 105.

General Fund Resources & Requirements

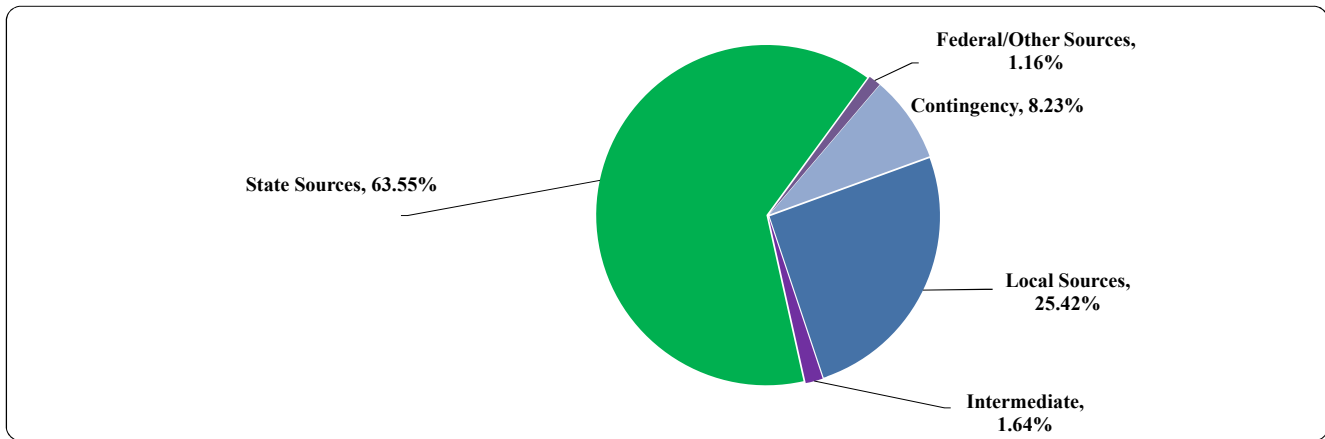
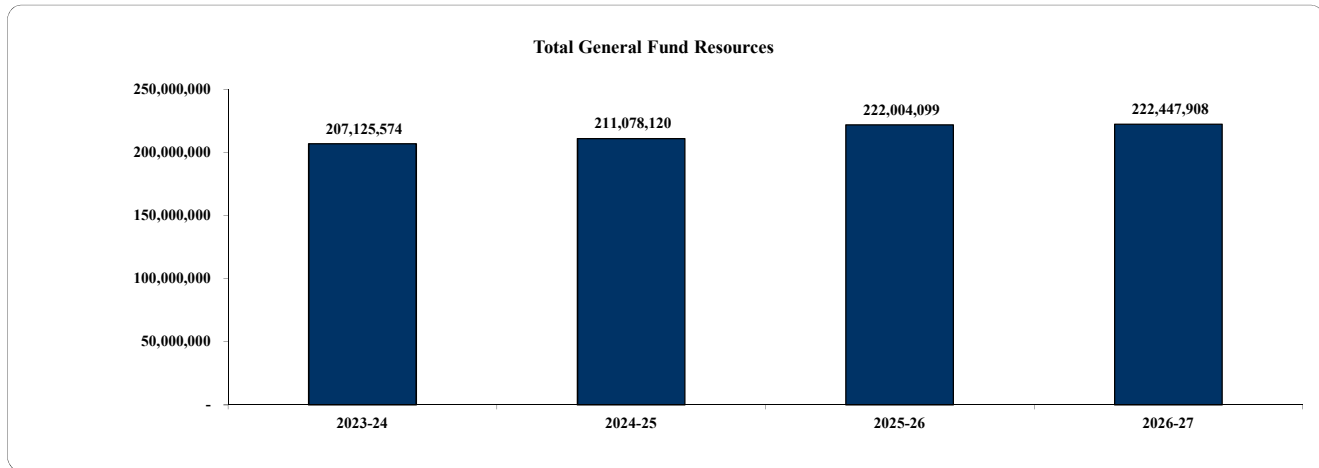
The General Fund is the primary operating fund of the District.
This fund is used to account for all unrestricted resources.



In FY26-27, General Fund Budget Resources are \$222.5M, an increase of \$0.4M or 0.2% from the prior year. Revenues minus expenditures leaves a deficit balance of \$2.05M. Beginning fund balance is projected to be \$18.3M, -\$4.7M or -20.6% lower than the prior year. See pp. 9-14 for more information on resources and pp. 15-103 for more information on requirements.

General Fund Resource Summary

	2023-24	2024-25	2025-26	2026-27	2026-27	2026-27
Total General Fund Resources	Actual	Actual	Amended	Proposed	Approved	Adopted
Local	51,371,285	53,532,541	55,388,533	56,550,466	56,550,466	
Intermediate	3,693,402	3,615,426	3,400,000	3,650,000	3,650,000	
State	124,114,169	130,252,673	137,576,880	141,366,756	141,366,756	
Federal	175,553	125,715	130,000	130,000	130,000	
Transfers In and Other Sources	3,631,838	2,272,580	2,450,000	2,450,000	2,450,000	
Beginning Fund Balance	24,139,326	21,279,184	23,058,686	18,300,686	18,300,686	
TOTAL RESOURCES	207,125,574	211,078,120	222,004,099	222,447,908	222,447,908	



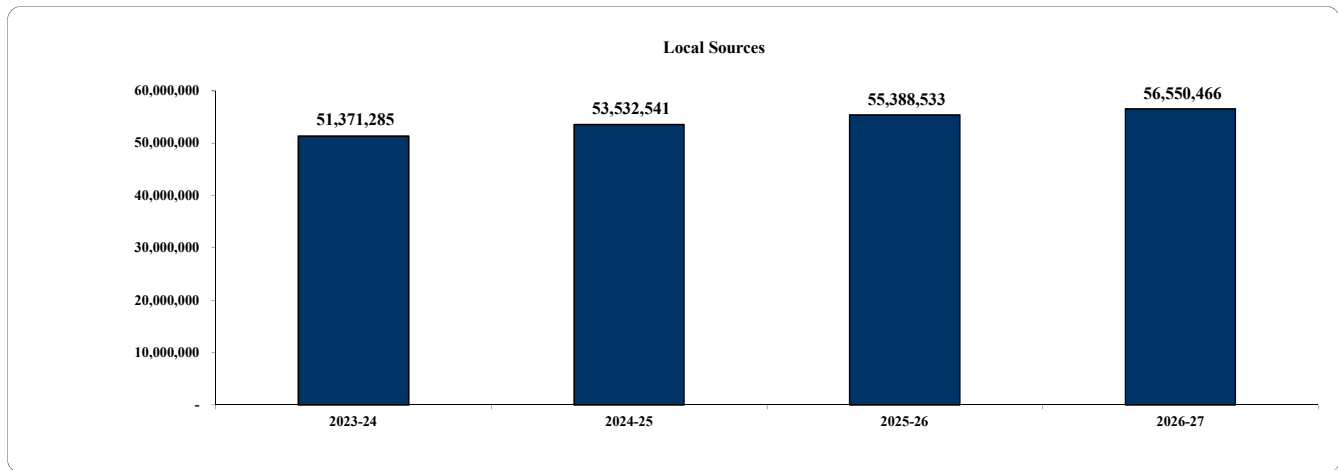
Including transfers in from other funds and the beginning fund balance, there is a \$0.44M or 0.20% increase in total resources from the prior year. This difference is mainly due to a increase of nearly \$1.1M in Local resources driven by higher property tax partially offset by lower interest income, a \$3.8M increase in State Sources primarily from the State School Fund (SSF) partially offset by lower revenue for the regional JDEP program which is transferred to SOESD in 2026-27, and a reduction in the beginning fund balance by -\$4.7M. There is a \$0.25M increase in Intermediate funds driven by higher expected revenue in the second year of the 2025-27 biennial budget. More details of resource changes can be found on pp. 9-14.

Total revenue (resources minus transfers in and beginning fund balance) is estimated to increase \$5.2M or 2.6% over prior budget.

Transfers in from other sources of income are budgeted at \$2.45M, of which \$0.55M is from the PERS fund, to help cover the rising PERS rates. See p. 110 for more detail regarding the PERS reserve fund.

General Fund Resources

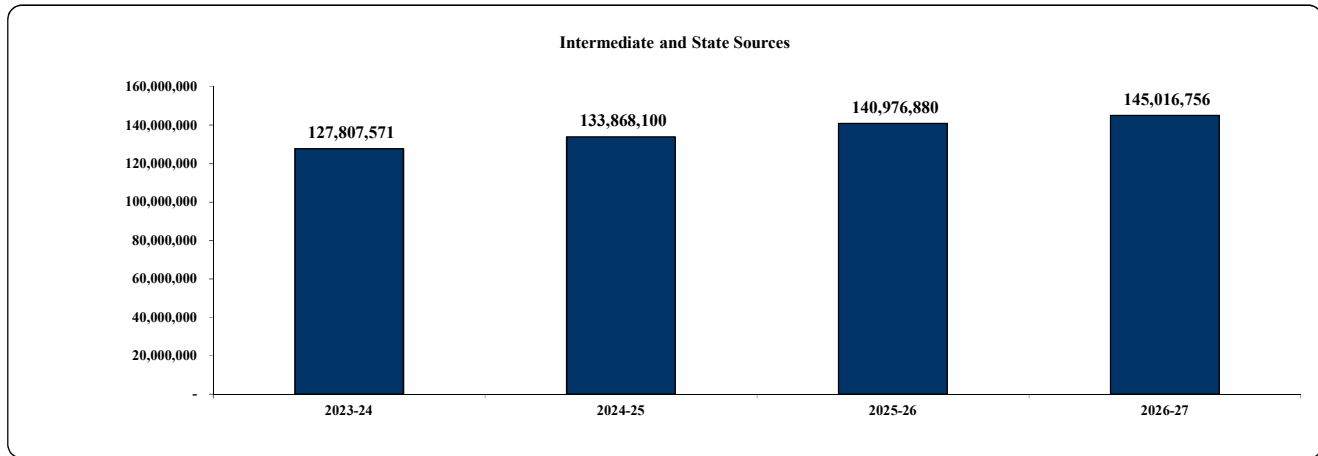
Local Sources	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Current Year Taxes	44,437,062	47,536,894	49,551,280	51,067,280	51,067,280	
Prior Years' Taxes	1,116,233	1,226,183	848,720	848,720	848,720	
Payment in Lieu of Property Taxes	-	(756,428)	-	-	-	
Interest/Penalties on Taxes	29,518	29,926	35,000	40,000	40,000	
Interest on Investments	3,601,991	3,028,492	2,634,533	2,200,966	2,200,966	
Pre-School Fees	70,357	54,548	50,000	65,000	65,000	
Other Revenue - Local Sources	-	-	-	70,000	70,000	
Rentals	38,082	38,904	100,000	100,000	100,000	
Contributions	19,745	2,606	-	-	-	
Services Provided Other Charter Schools	37,602	57,479	40,000	40,000	40,000	
Recovery of Expenditures	-	15,054	5,000	5,000	5,000	
Services Provided Other Funds	-	153	50,000	50,000	50,000	
Fees Charges to Grants	1,208,517	1,248,477	1,140,000	1,140,000	1,140,000	
Miscellaneous Revenue	44,800	168,489	150,000	150,000	150,000	
Payroll Reimbursement	11,650	12,975	35,000	35,000	35,000	
Field Trip Reimbursement	59,776	44,755	15,000	15,000	15,000	
P-Card Rebate	64,866	120,455	85,000	75,000	75,000	
Music Instrument Rentals	800	22,629	13,000	12,500	12,500	
Self-Pay Health Ins Reimbursement	565,060	570,277	533,000	533,000	533,000	
E-Rate Reimbursement	65,227	110,673	103,000	103,000	103,000	
LOCAL SOURCES	51,371,285	53,532,541	55,388,533	56,550,466	56,550,466	



Local sources for FY26-27 are budgeted to come in at \$56.5M, up \$1.1M (2.1%) from the FY25-26 Amended Budget of \$55.4M. Local revenue sources primarily come from property taxes, which make up nearly 92% of the local sources. Property taxes are pooled together at the state level and allocated equally as part of the State School Fund (SSF) funding formula. For the FY26-27 Budget, property taxes are projected to come in at \$51.9M, which is \$1.5M (3.0%) higher than the FY25-26 Budget.

General Fund Resources

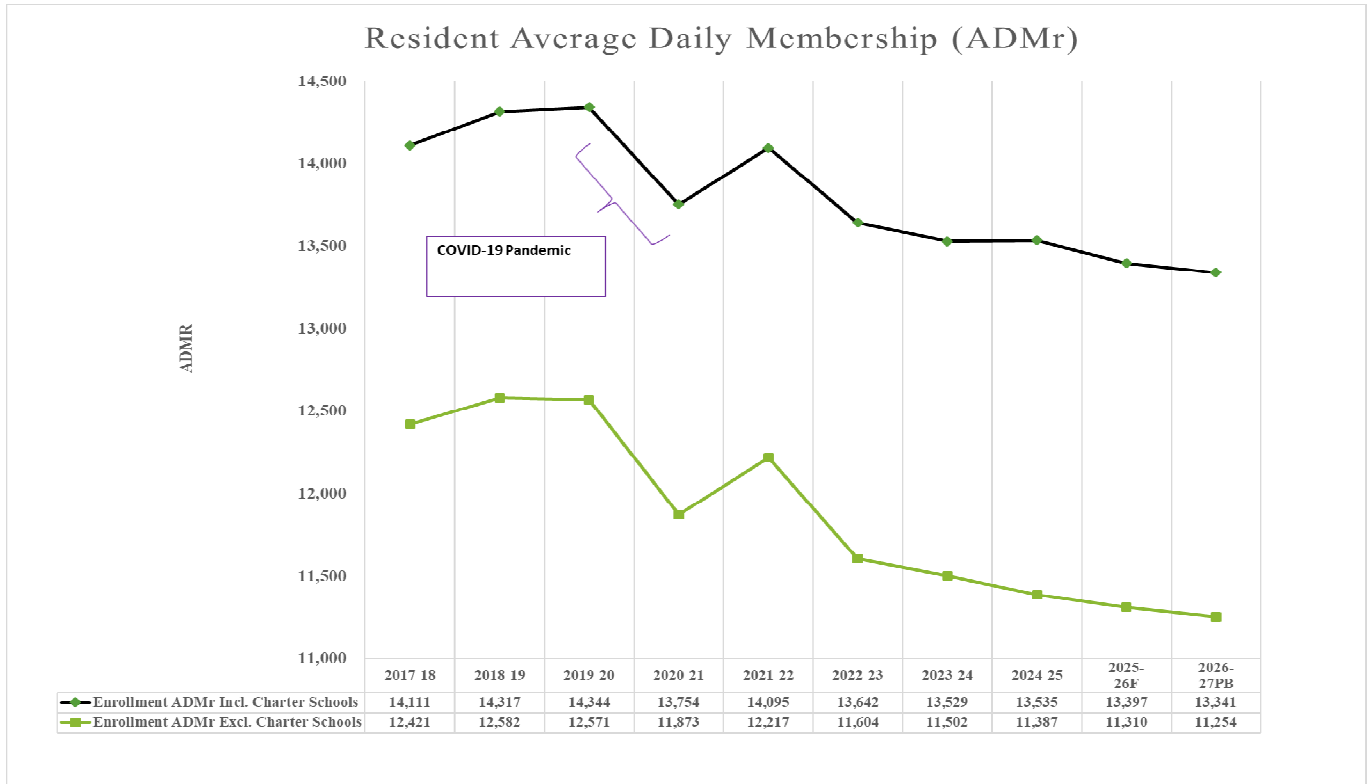
	2023-24	2024-25	2025-26	2026-27	2026-27	2026-27
Intermediate Sources	Actual	Actual	Amended	Proposed	Approved	Adopted
Pass-Through from SOESD	3,649,075	3,559,085	3,400,000	3,650,000	3,650,000	
Other Intermediate Sources	44,328	56,341	-	-	-	
INTERMEDIATE SOURCES	3,693,402	3,615,426	3,400,000	3,650,000	3,650,000	
State Sources	Actual	Actual	Amended	Proposed	Approved	Adopted
State School Fund	121,940,637	127,687,963	135,083,731	139,374,923	139,374,923	
Common School Fund	1,800,481	1,852,535	1,967,879	1,961,833	1,961,833	
Juvenile Detention Grant	329,051	478,153	495,270	-	-	
Teen Parent Grant	15,394	20,794	30,000	30,000	30,000	
State Grants	28,606	213,228	-	-	-	
Miscellaneous Revenue	-	-	-	-	-	
STATE SOURCES	124,114,169	130,252,673	137,576,880	141,366,756	141,366,756	



Intermediate sources for FY26-27 are estimated at \$3.65M, which is \$.25M higher than the prior year due to higher SSF allocation to SOESD in the second year of the 2025-27 biennium. The \$3.65M of Intermediate revenue is coming from the Southern Oregon Education Service District (SOESD) as a pass-through in lieu of Special Education (SpEd) and non-SpEd services provided.

District staff are working with the SOESD staff to finalize the SpEd service plan for FY26-27. As such, this is a work in process, and the pass through estimate from SOESD could change.

State sources are estimated at \$141.4M for FY26-27, up \$3.8M (2.8%). For FY26-27 the Medford School District (MSD) is in the second year of an estimated \$11.359B 2025-27 K-12 biennial funding where 49% of the SSF was allocated for the first year and 51% for the second year. Juvenile Detention (JDEP) revenue and expense function 1283 (page 47) are both down to zero for this regional program as it is being transferred to SOESD.



2026-27 Budget

The projected consolidated ADMr of 13,341 for the District budget is down 56 or 0.4% from prior year. Consolidated ADMr is down 770 or 5.4% students from 2017-18.

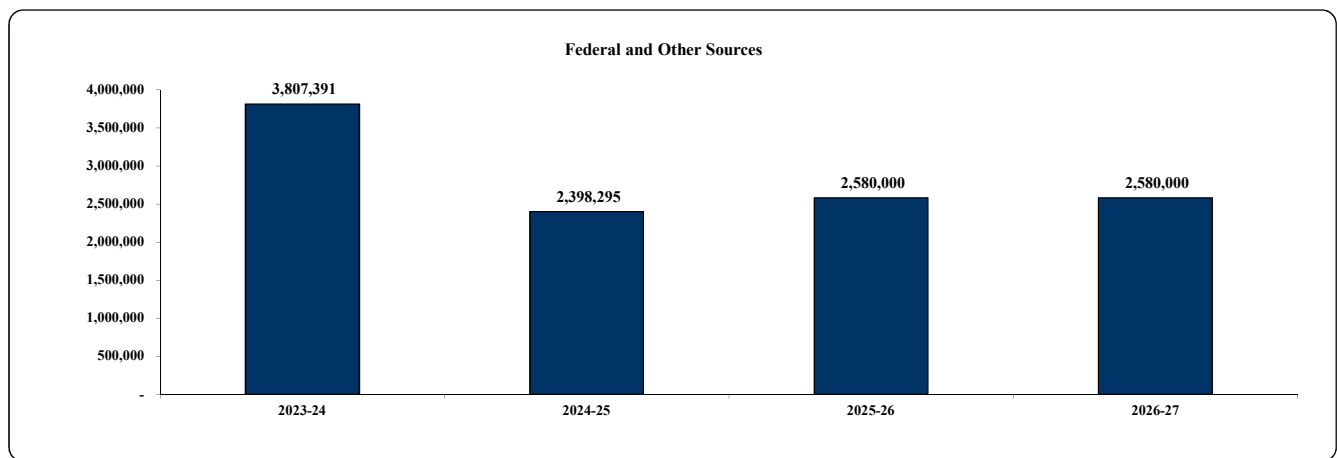
Charter School ADMr: Charter school ADMr is projected at 2,087, equal to prior year. Enrollment has increased 1,690 students or 23.5% from 2017-18.

Non-Charter ADMr: Non-Charter school ADMr is projected down 56.0 ADMr or 0.5% from prior year and has decreased 1,167 students or 9.4% from 2017-18.

General Fund Resources

Federal Sources	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Child Care Block Grant	15,987	20,880	30,000	30,000	30,000	
Other Restricted Grant-in-Aid	-	42,040	-	-	-	
Restricted from Fed thru State	-	21,536	-	-	-	
Federal Forest Fees	159,566	41,260	100,000	100,000	100,000	
FEDERAL SOURCES	175,553	125,715	130,000	130,000	130,000	

Other Sources	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Transfers From Other Funds	550,000	550,000	550,000	550,000	550,000	
Other Sources - SBITA (GASB 96)	2,856,138	1,226,046	1,300,000	1,300,000	1,300,000	
Other Sources - GASB 87 Leases	225,700	496,534	600,000	600,000	600,000	
OTHER SOURCES	3,631,838	2,272,580	2,450,000	2,450,000	2,450,000	
TOTAL Federal and Other Sources	3,807,391	2,398,295	2,580,000	2,580,000	2,580,000	



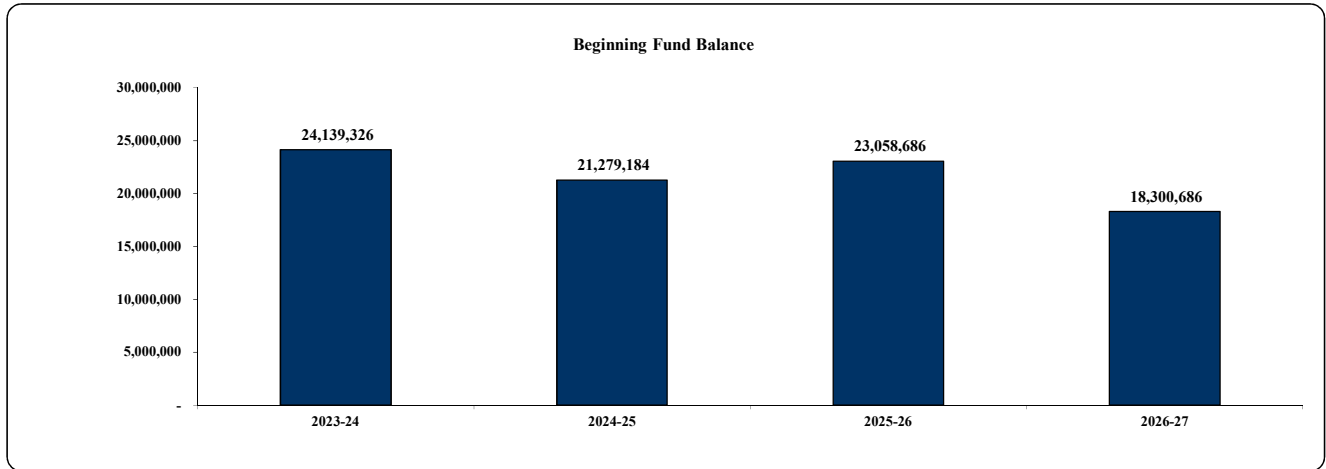
Federal sources are budgeted at \$0.13M, which is flat to the prior year budget.

Transfers in are budgeted at \$0.55M from the PERS reserve fund. See p. 110 for more detail regarding the PERS reserve fund.

The other sources of income from GASB 96 Subscription Based Information Technology Arrangements (SBITA) and from GASB 87 Leases are offset by an equal capital expense. These are required accounting entries that have no impact to Contingency/Fund Balance.

General Fund Resources

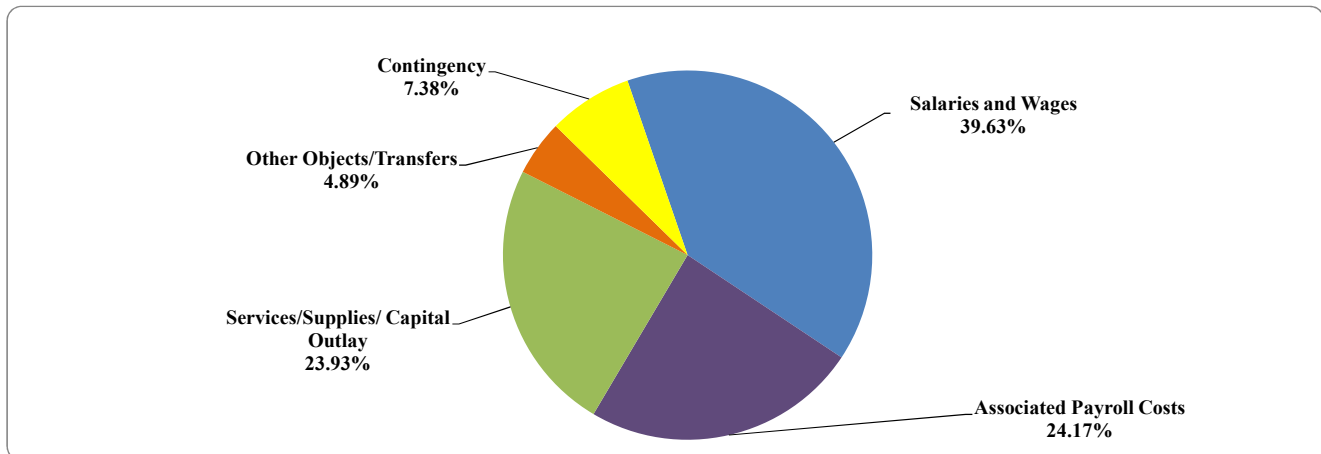
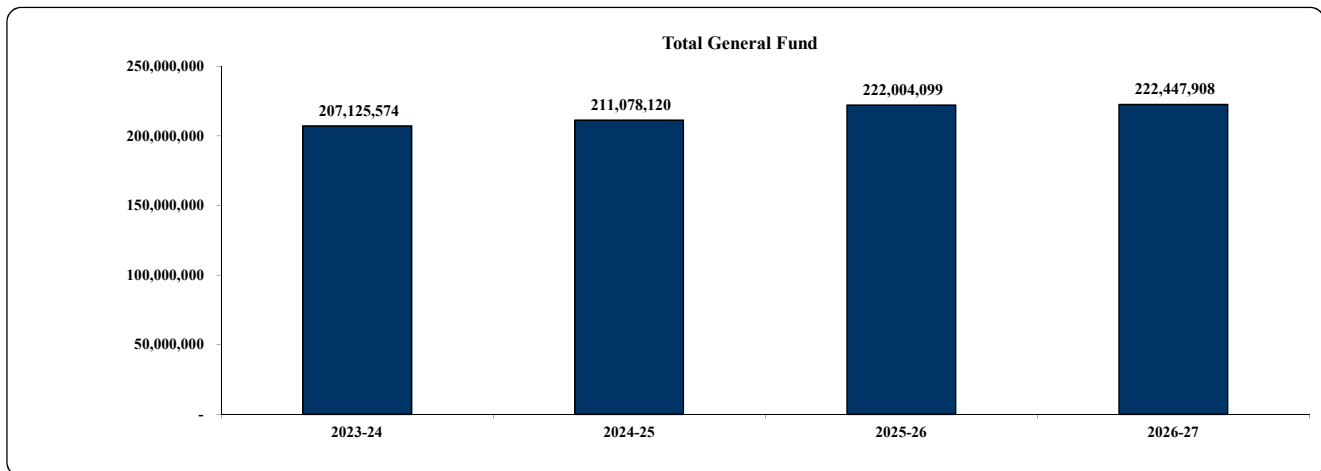
Beginning Fund Balance	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Beginning Fund Balance	24,139,326	21,279,184	23,058,686	18,300,686	18,300,686	
BEGINNING FUND BALANCE	24,139,326	21,279,184	23,058,686	18,300,686	18,300,686	



Beginning Fund Balance is down -\$4.7M, -20.6% due to deficit spending in FY25-26.

General Fund Requirements By Object Group

TOTAL General Fund	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Salaries and Wages	76,633,310	78,054,765	85,154,967	87,237,695	87,237,695	
Benefits	47,319,436	46,561,424	51,856,744	53,214,841	53,214,841	
Purchased Services	37,829,948	41,451,568	43,183,664	44,951,989	44,951,989	
Supplies and Materials	6,826,169	4,873,619	7,281,330	7,757,140	7,757,140	
Capital Outlay	3,263,254	2,093,232	2,275,000	2,265,000	2,265,000	
Other Objects	3,609,459	3,486,668	2,003,707	2,282,557	2,282,557	
Transfers	10,364,813	11,498,650	11,948,000	8,488,000	8,488,000	
Contingency	21,279,185	23,058,193	18,300,686	16,250,686	16,250,686	
TOTAL General Fund	207,125,574	211,078,120	222,004,099	222,447,908	222,447,908	

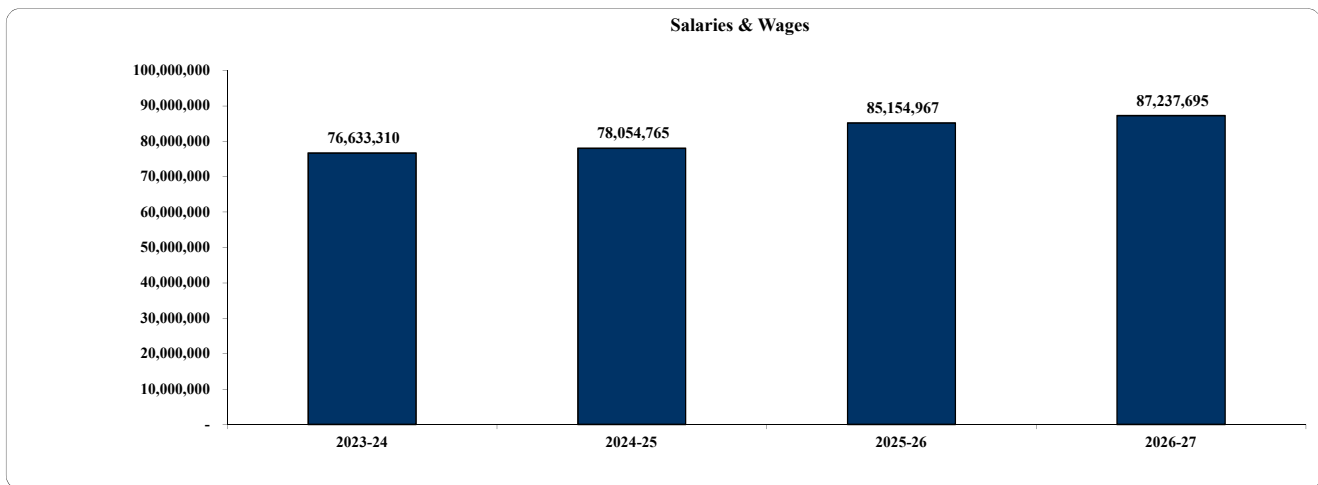


General Fund Requirements are up \$0.53M or 0.2% to \$222.5M, due primarily to a 4.25% increase in the Cost of Living adjustment. The Cost of Living Adjustment is partially offset by lower transfers out to other funds, staffing reductions and lower contingency due to deficit spending. Spending is up \$6.0M to \$197.8M (3.2%), transfers out to other funds are down -\$3.4M (-28.9%) and Contingency is down -\$2.05M (11.2%). See spending detail on pages 16 to 103 for more information. Total FTE across all funds is down -20.13 (see the following pages for more details).

Individual changes by object and function are described in the following pages of this budget document. The chart above shows the allocation of requirements by object, including contingency. When fund balance reserves, contingency, and charter school pass-through payments are excluded, the ratios for percentage of total General Fund spending are: salaries and wages 47.92%, payroll benefit cost 29.23%, services/supplies/capital outlay 16.94%, and other objects/transfers 5.91%. This again demonstrates that most of the District spending for ongoing operations is in personnel costs with 77.1% of ongoing operational spending going toward salaries and benefits. It should also be noted, the Medford School District outsources transportation and if transportation was not outsourced, salary and benefit spending would exceed 80% of total spending excluding charter school pass throughs.

General Fund Expenditures - Salary & Wages Summary

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	44,461,759	43,845,632	47,157,784	48,074,386	48,074,386	
Classified	19,823,757	20,978,428	24,124,978	25,526,262	25,526,262	
Administrative	6,729,116	6,874,898	7,395,161	7,316,707	7,316,707	
Classified Managers	1,638,833	1,788,307	1,490,275	1,506,628	1,506,628	
Early Retirement Stipends	539,000	500,000	621,484	638,400	638,400	
Licensed Substitutes	27,402	-	23,690	23,690	23,690	
Classified Substitutes	76,521	98,228	146,650	150,475	150,475	
Licensed Temporary	913,902	623,474	691,716	579,799	579,799	
Classified Temporary	244,984	244,015	469,584	479,584	479,584	
Additional Salary	-	67,500	90,000	-	-	
Classified Overtime	553,342	531,026	432,875	432,875	432,875	
Extra Duty Compensation	1,258,466	1,609,271	1,792,425	1,801,428	1,801,428	
Home Instruction	35,478	37,032	160,611	157,861	157,861	
Insurance Opt Out	330,751	856,953	557,734	549,600	549,600	
SALARIES & WAGES	76,633,310	78,054,765	85,154,967	87,237,695	87,237,695	



Total General Fund salaries and wages are up \$2.08M or 2.45% to \$87.2M from \$85.1M in the prior year. The primary drivers of the \$2.08M increase are: \$3.40M for a 4.25% COLA increase and \$1.24M for step increases. There is a reduction of -\$0.1M in temporary labor, as well as -\$0.77M assumed vacancy rate/open positions, based on prior years. The remaining balance is due to a reduction of -\$1.71M, for -19.55 FTE staffing changes in the General Fund. See the next page for a detailed explanation on staffing changes for all funds.

All District Funds Staffing Summary

<i>Full Time Equivalent (FTE)</i>	FY26-27	FY25-26	Change from	FY24-25	Change from
	Approved Budget	Amended Budget	25-26 Amended	Adopted	24-25 Adopted
<u>Instruction</u>					
General Fund - Non SpEd	604.40	633.95	(29.55)	621.16	(16.76)
Special Revenue - Non SpEd	119.99	119.57	0.42	132.77	(12.78)
Subtotal Non SpEd Instruction	724.40	753.53	(29.13)	753.93	(29.53)
General Fund - SpEd	208.87	191.87	17.00	165.40	43.47
Special Revenue - SpEd	33.28	33.28	0.00	45.63	(12.35)
Subtotal SpEd Instruction	242.15	225.15	17.00	211.03	31.12
Total Instruction	966.55	978.69	(12.13)	964.96	1.59
<u>Support Services</u>					
General Fund - Non SpEd	320.46	327.46	(7.00)	333.09	(12.63)
Special Revenue - Non SpEd	30.50	31.50	(1.00)	31.00	(0.50)
Subtotal Non SpEd Support Services	350.96	358.96	(8.00)	364.09	(13.13)
General Fund - SpEd	39.20	39.20	-	32.80	6.40
Special Revenue - SpEd	2.00	2.00	-	8.00	(6.00)
Subtotal SpEd Support Services	41.20	41.20	-	40.80	0.40
Total Support Services	392.17	400.17	(8.00)	404.89	(12.73)
<u>Consolidated</u>					
General Fund - Non SpEd	924.86	961.41	(36.55)	954.25	(29.39)
Special Revenue - Non SpEd	150.49	151.07	(0.58)	163.77	(13.28)
Subtotal Non SpEd Consolidated	1,075.36	1,112.49	(37.13)	1,118.02	(42.66)
General Fund - SpEd	248.07	231.07	17.00	198.20	49.86
Special Revenue - SpEd	35.28	35.28	0.00	53.63	(18.35)
Subtotal SpEd Consolidated	283.35	266.35	17.00	251.83	31.51
TOTAL CONSOLIDATED	1,358.71	1,378.84	(20.13)	1,369.85	(11.15)
<u>SpEd = Special Education</u>					

The projected staffing for FY26-27 is 1,358.71 FTE, a net decrease of 20.13 FTE or -1.46% lower across all funds.

The decrease is due to the following changes by grouping:

Instruction, General Fund, Non-SpEd -29.55 FTE

The decrease in this area is due to the following reductions (note: some reductions in FTE is due to a move of that FTE to the Special Revenue fund): The reduction of 21.0 FTE certificated staffing, a reduction of 5.63 classified Educational Support Staff, a reduction of 2.0 FTE Blending Learning, a reduction of 1.92 FTE for Alternative Education, and a net positive move of 1.0 FTE to Special Revenue funds.

Instruction, Special Revenue Fund, Non-SpEd 0.42 FTE

The decrease in this area is due to the following: A reduction of -0.8 FTE Emerging Migrant Ed Coordinator (position being changed to TOSA), the reduction of -0.78 FTE Alt Ed Coordinator, the reclass of -1.0 FTE from the SIA fund to the General Fund. This is mostly offset by the move of 3.0 FTE from the General Fund to Measure 98 (Special Revenue).

Instruction, General Fund, SpEd 17.0 FTE

There has been an increase of 17.0 FTE in this budget due to the expectation of an increased SpEd student population and need.

Support Services, General Fund, Non-SpEd -7.0 FTE

Note that all reductions in this area are from resignations or vacancy positons. The 7.0 FTE decrease is from the following: Multilith Operator, Helpdesk Staff, Application Data Management, Roving Custodian, Custodian, Compliance & Practice Officer, and Administrative Assistant.

Support Services, Special Revenue, Non SpEd -1.0 FTE

This is from reducing 2.0 FTE Curriculum Coordinators and addition of 1.0 FTE Curriculum Assistant Director.

FTE Roadmap by Function - Across all Funds

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All District Funds Staffing by Function Through the Years

Function	Function Description	FY26-27 Approved	FY25-26 Amended	FY24-25	FY23-24	FY22-23	FY21-22	FY20-21	FY19-20	FY18-19	FY17-18
1111	Elementary - Primary	290.61	307.36	311.72	328.57	360.21	375.77	368.60	374.06	374.06	376.05
1121	Middle-Except Co-Curr	136.65	140.65	138.62	136.69	98.98	98.64	97.81	94.87	94.87	86.93
1131	High School-Except Co-Curr	181.91	185.91	183.75	186.28	171.19	182.44	172.86	190.54	190.04	180.61
1210	Talented and Gifted	-	-	-	-	-	-	1.38	0.62	0.62	0.62
1220/1240	SPED: Maps and Focus	139.97	122.97	111.99	110.85	103.40	96.25	83.46	72.68	72.68	72.38
1250	ERC - Resource Rooms	97.28	97.28	96.03	97.77	90.20	98.50	96.57	70.78	70.78	61.49
1260	Early Intervention Childhood	4.91	4.91	3.00	3.20	4.00	3.30	3.60	-	-	-
1261	Learning Disabilities	8.31	8.31	8.10	7.52	11.88	11.50	17.43	22.58	20.58	7.16
1272	Title I	43.48	43.48	44.13	45.90	49.45	59.01	58.82	63.00	63.00	69.13
1283	District Alternative Programs	1.13	5.51	6.25	3.19	4.50	4.38	4.06	4.50	4.50	4.38
1285	Medford Online Academy 9-12	-	-	-	-	15.50	12.00	18.00	-	-	-
1286	Medford Online Academy K-8	-	-	4.50	6.00	10.88	22.00	24.50	-	-	-
1291	English Language Learners	53.19	53.19	48.64	47.70	45.35	43.62	46.62	43.96	42.96	42.96
1292	Teen Parent	7.17	7.17	7.30	7.29	6.86	7.51	6.95	7.51	7.51	7.51
1295	Homebound Instruction	0.94	0.94	0.94	-	1.88	-	-	-	-	-
1296	Homeschool	1.00	1.00	-	-	-	-	-	-	-	-
1297	At Risk	-	-	-	-	-	-	0.25	0.25	0.25	0.25
TOTAL INSTRUCTION		966.55	978.68	964.96	980.96	974.26	1,014.93	1,000.90	945.35	941.86	909.48
2112	Attendance	3.00	3.00	3.00	6.00	5.00	4.25	2.00	2.00	2.00	2.00
2115	School Resource Officers	1.00	1.00	-	-	-	-	-	-	-	-
2121	Dean's Office	3.00	3.00	3.00	3.00	2.00	2.00	4.00	4.00	4.00	4.00
2122	Counseling Services	25.00	25.00	23.00	23.50	22.50	24.50	10.50	12.00	12.00	14.00
2134	Nurse Services	8.83	8.83	8.83	8.47	8.00	8.72	8.44	8.41	8.41	6.00
2140	Psychological Services	8.00	8.00	10.00	9.00	11.00	7.00	7.88	24.38	20.38	17.69
2150	Speech and Audiology	22.20	22.20	17.80	19.20	17.90	21.20	22.40	19.50	19.50	16.00
2160	Occupational Th/Autism Spc	5.00	5.00	7.00	4.00	4.00	3.80	2.94	2.44	2.44	2.00
2190	Student Support Services	6.00	6.00	6.00	8.00	4.00	3.89	3.94	5.03	5.03	10.44
2191	Student Wellness	1.50	1.50	1.50	1.50	1.50	1.50	2.97	-	-	-
Subtotal Direct Student Support		83.53	83.53	80.13	82.67	75.90	76.86	65.06	77.76	73.75	72.13
2210	Improvement of Instruction	4.08	4.08	4.20	2.74	0.25	-	3.15	2.71	2.71	3.25
2211	Improvement of Instruction	3.22	3.22	2.80	4.41	4.50	1.00	2.50	1.50	1.50	1.00
2213	Curriculum Development	1.00	2.00	2.00	2.00	3.00	3.00	2.00	1.00	1.00	1.00
2221	Instructional Media Center	-	-	-	-	-	-	1.00	1.47	1.00	1.00
2222	School Libraries	22.47	22.47	22.47	25.47	20.97	19.97	21.97	22.35	22.35	22.35
2240	Instruct'n'l Staff Devlpmnt	-	-	-	-	3.00	4.90	-	2.00	2.00	2.00
Subtotal Direct Staff Support		30.77	31.77	31.47	34.62	31.72	28.87	30.61	31.03	30.56	30.60
2321	Superintendent Services	4.75	4.75	4.75	4.73	4.73	3.73	4.75	6.75	6.75	6.75
2322	Communications	3.40	3.40	3.00	3.00	4.00	3.38	3.00	-	-	-
2325	Elementary Director	-	-	-	-	-	-	-	2.00	2.00	2.00
2326	Secondary Director	-	-	-	-	-	-	-	2.00	2.00	2.00
2327	Teaching & Learning	7.00	8.00	8.00	9.00	8.80	9.27	9.00	-	-	-
2329	Secondary Athletics	2.00	2.00	2.00	2.00	2.00	-	-	-	-	-
2410	Office of the Principal	105.22	105.22	109.75	109.88	105.88	100.88	99.50	83.00	83.00	80.00
2510	Office of the Business Services Director	-	-	-	-	-	-	-	-	-	-
2521	Business Services	8.80	8.80	8.80	8.80	9.80	8.80	8.49	6.80	6.80	6.55
2542	Custodial	68.70	70.70	73.00	75.50	77.00	77.00	77.00	66.00	66.00	66.00
2544	Maintenance	31.00	32.00	33.00	33.00	33.00	30.00	29.00	29.47	29.47	28.47
2550	Safe Routes to School	-	-	1.00	1.00	1.00	1.00	0.75	-	-	-
2572	Purchasing/Warehouse Svcs	3.00	3.00	3.00	3.40	2.40	2.00	3.00	3.00	3.00	2.00
2574	Printing and Publishing Services	1.00	2.00	2.00	2.00	2.00	2.00	2.47	2.00	2.00	2.00
2640	Human Resources	9.00	9.00	9.00	11.05	13.45	12.20	8.20	8.20	8.20	8.20
2661	Information Technology	31.00	33.00	33.00	34.00	33.00	28.00	29.00	27.00	24.00	21.47
2669	Network and Telecommunication Services	-	-	-	-	-	-	-	-	-	-
3360	Family Outreach	3.00	3.00	3.00	4.00	4.00	3.00	-	-	-	-
Subtotal General Support		277.87	284.87	293.30	301.36	301.06	281.25	274.16	236.22	233.22	225.44
TOTAL SUPPORT SERVICES		392.16	400.16	404.89	418.65	408.68	386.98	369.83	345.01	337.53	328.17
GRAND TOTAL		1,358.71	1,378.85	1,369.86	1,399.61	1,382.95	1,401.90	1,370.72	1,290.36	1,279.39	1,237.64
Additional FTE from FY17-18		121.07	141.20	132.21	161.97	145.31	164.25	133.08	52.72	41.74	-
SpEd Totals		293.16	276.17	261.42	261.04	247.88	246.94	241.17	217.39	211.39	182.72

The table above shows the increase in staffing across all funds by function since FY17-18. To achieve the goals set by the Board, the District has allocated resources to increasing total staffing by 121 FTE to 1,358.71 FTE in FY26-27 from 1,237.64 in FY17-18, a 9.8% increase. During the same time frame where staff has increased by 9.8%, enrollment for non-charter schools has decreased by -1,167 or 9.4% (see page 12).

All District Funds Staffing

Function	Function Description	FY26-27 Approved Budget	FY25-26 Amended Budget	FY17-18	Variance from FY17-18 to FY26-27	Variance from FY17-18 to FY25-26
1111	Elementary - Primary	290.61	307.36	376.05	(85.44)	(68.69)
1121	Middle-Except Co-Curr	136.65	140.65	86.93	49.72	53.72
1131	High School-Except Co-Curr	181.91	185.91	180.61	1.31	5.31
1210	Talented and Gifted	-	-	0.62	(0.62)	(0.62)
1220/1240	SPED: Maps and Focus	139.97	122.97	72.38	67.59	50.59
1250	ERC - Resource Rooms	97.28	97.28	61.49	35.79	35.79
1260	Early Intervention Childhood	4.91	4.91	-	4.91	4.91
1261	Early Intervening	8.31	8.31	7.16	1.15	1.15
1272	Title I	43.48	43.48	69.13	(25.65)	(25.65)
1283	District Alternative Programs	1.13	5.51	4.38	(3.26)	1.13
1291	English Language Learners	53.19	53.19	42.96	10.23	10.23
1292	Teen Parent	7.17	7.17	7.51	(0.34)	(0.34)
1295	Homebound Instruction	0.94	0.94	-	0.94	0.94
1296	Homeschool	1.00	1.00	-	1.00	1.00
1297	At Risk	-	-	0.25	(0.25)	(0.25)
TOTAL INSTRUCTION		966.55	978.68	909.48	57.07	69.21
2112	Attendance	3.00	3.00	2.00	1.00	1.00
2115	School Resource Officers	1.00	1.00	-	1.00	-
2121	Dean's Office	3.00	3.00	4.00	(1.00)	(1.00)
2122	Counseling Services	25.00	25.00	14.00	11.00	11.00
2134	Nurse Services	8.83	8.83	6.00	2.83	2.83
2140	Psychological Services	8.00	8.00	17.69	(9.69)	(9.69)
2150	Speech and Audiology	22.20	22.20	16.00	6.20	6.20
2160	Occupational Th/Autism Spc	5.00	5.00	2.00	3.00	3.00
2190	Student Support Services	6.00	6.00	10.44	(4.44)	(4.44)
2191	Student Wellness	1.50	1.50	-	1.50	1.50
Subtotal Direct Student Support		83.53	83.53	72.13	11.40	10.40
2210	Improvement of Instruction	4.08	4.08	3.25	0.83	0.83
2211	Improvement of Instruction	3.22	3.22	1.00	2.22	2.22
2213	Curriculum Development	1.00	2.00	1.00	-	1.00
2221	Instructional Media Center	-	-	1.00	(1.00)	(1.00)
2222	School Libraries	22.47	22.47	22.35	0.12	0.12
2240	Instruct'nl Staff Developmnt	-	-	2.00	(2.00)	(2.00)
Subtotal Direct Staff Support		30.77	31.77	30.60	0.17	1.17
2321	Superintendent Services	4.75	4.75	6.75	(2.00)	(2.00)
2322	Communications	3.40	3.40	-	3.40	3.40
2325	Elementary Director	-	-	2.00	(2.00)	(2.00)
2326	Secondary Director	-	-	2.00	(2.00)	(2.00)
2327	Teaching & Learning	7.00	8.00	-	7.00	8.00
2329	Secondary Athletics	2.00	2.00	-	2.00	2.00
2410	Office of the Principal	105.22	105.22	80.00	25.22	25.22
2521	Business Services	8.80	8.80	6.55	2.25	2.25
2542	Custodial	68.70	70.70	66.00	2.70	4.70
2544	Maintenance	31.00	32.00	28.47	2.53	3.53
2550	Safe Routes to School	-	-	-	-	-
2572	Purchasing/Warehouse Svcs	3.00	3.00	2.00	1.00	1.00
2574	Printing and Publishing Services	1.00	2.00	2.00	(1.00)	-
2640	Human Resources *	9.00	9.00	8.20	0.80	0.80
2661	Information Technology	31.00	33.00	21.47	9.53	11.53
3360	Family Outreach	3.00	3.00	-	3.00	3.00
Subtotal General Support		277.87	284.87	225.44	52.43	59.43
TOTAL SUPPORT SERVICES		392.16	400.16	328.17	63.99	70.99
GRAND TOTAL		1,358.71	1,378.84	1,237.64	121.07	140.20

While the number of students projected for FY26-27 non charter enrollment is down 9.4% when compared to FY17-18 (see page 12), the proposed FY26-27 staffing has increased by a total of 121.07 FTE, or 9.8%. Approximately 113.61 FTE or 93.8% of the 121.07 FTE increase over the last decade is driven by increases in SpEd 103.38 FTE (MAPS & FOCUS 67.59 FTE and ERC Resource Rooms 35.79 FTE) and ELL 10.23 FTE .

The largest count increase in staffing from 2017-18 to 2026-27 is in Instruction 57.07 FTE or 6.3% where increases in SpEd and ELL areas are partially offset by decreases in Elementary and Title FTE. It should be noted about 38 positions transferred from Elementary schools to Middle Schools when sixth grade transferred to middle schools in FY 23-24. In SpEd functions MAPS, FOCUS and ERC Resource rooms staff has increased by 103.38 or 77% over the last decade. The largest percentage increase from 2017-18 to 2026-27 is in General Support 52.43 FTE or 23.3% driven primarily by increases in Office of the Principal and Information Technology.

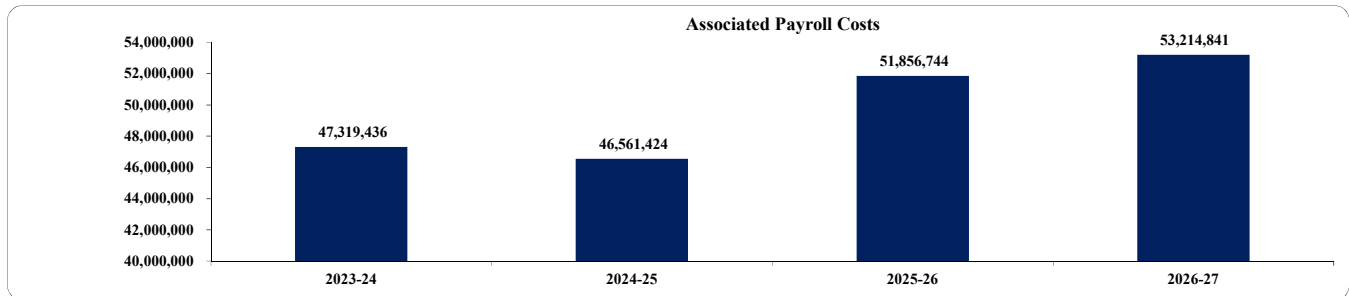
All District Funds Staffing By Fund FY26-27

Function	Function Description	General Fund	Federally Funded Special Revenue Grants	SIA Grant Funded	Other Grants	FY25-26 Total
1111	Elementary - Primary	259.21	-	20.00	11.40	290.61
1121	Middle-Except Co-Curr	128.40	-	4.00	4.25	136.65
1131	High School-Except Co-Curr	154.01	0.60	9.00	18.31	181.91
1210	Talented and Gifted	-	-	-	-	-
1220/1240	SPED: Maps and Focus	126.92	9.05	4.00	-	139.97
1250	ERC - Resource Rooms	77.95	5.58	13.75	-	97.28
1260	Early Intervention Childhood	4.00	0.91	-	-	4.91
1261	Early Intervening	2.44	5.88	-	-	8.31
1272	Title I	-	43.18	-	0.30	43.48
1283	District Alternative Programs	1.13	-	-	-	1.13
1285	Medford Online Academy 9-12	-	-	-	-	-
1286	Medford Online Academy K-8	-	-	-	-	-
1291	English Language Learners	50.11	2.08	-	1.00	53.19
1292	Teen Parent	7.17	-	-	-	7.17
1295	Homebound Instruction	0.94	-	-	-	0.94
1296	Homeschool	1.00	-	-	-	1.00
1297	At Risk	-	-	-	-	-
1299	Remediation	-	-	-	-	-
	TOTAL INSTRUCTION	813.27	67.27	50.75	35.26	966.55
2112	Attendance	3.00	-	-	-	3.00
2115	School Resource Officers	1.00	-	-	-	1.00
2121	Dean's Office	3.00	-	-	-	3.00
2122	Counseling Services	16.00	-	9.00	-	25.00
2134	Nurse Services	8.83	-	-	-	8.83
2140	Psychological Services	8.00	-	-	-	8.00
2150	Speech and Audiology	22.20	-	-	-	22.20
2160	Occupational Th/Autism Spc	2.00	-	3.00	-	5.00
2190	Student Support Services	6.00	-	-	-	6.00
2191	Student Wellness	1.50	-	-	-	1.50
	Subtotal Direct Student Support	71.53	-	12.00	-	83.53
2210	Improvement of Instruction	-	4.08	-	-	4.08
2211	Improvement of Instruction	0.80	1.42	1.00	-	3.22
2213	Curriculum Development	-	-	1.00	-	1.00
2221	Instructional Media Center	-	-	-	-	-
2222	School Libraries	22.47	-	-	-	22.47
2240	Instruct'nl Staff Devlpmt	-	-	-	-	-
	Subtotal Direct Staff Support	23.27	5.50	2.00	-	30.77
2321	Superintendent Services	4.75	-	-	-	4.75
2322	Communications	3.40	-	-	-	3.40
2325	Elementary Director	-	-	-	-	-
2326	Secondary Director	-	-	-	-	-
2327	Teaching & Learning	7.00	-	-	-	7.00
2329	Secondary Athletics	2.00	-	-	-	2.00
2410	Office of the Principal	95.22	-	10.00	-	105.22
2521	Business Services	8.80	-	-	-	8.80
2542	Custodial	68.70	-	-	-	68.70
2544	Maintenance	31.00	-	-	-	31.00
2550	Safe Routes to School	-	-	-	-	-
2572	Purchasing/Warehouse Svcs	3.00	-	-	-	3.00
2574	Printing and Publishing Services	1.00	-	-	-	1.00
2640	Human Resources	9.00	-	-	-	9.00
2661	Information Technology	31.00	-	-	-	31.00
2669	Network and Telecommunication Services	-	-	-	-	-
3360	Family Outreach	-	-	3.00	-	3.00
	Subtotal General Support	264.87	-	13.00	-	277.87
	TOTAL SUPPORT SERVICES	359.66	5.50	27.00	-	392.16
	GRAND TOTAL	1,172.93	72.77	77.75	35.26	1,358.71

Of the 1,358.71 FTE projected for FY26-27, the General Fund has 1,172.93 FTE or 86.3% of total employees and the Special Revenue Fund has a combined 185.77 FTE or 13.7% of total employees. Of the 185.77 special revenue FTE, 77.75 FTE or 42% are in the SIA grant.

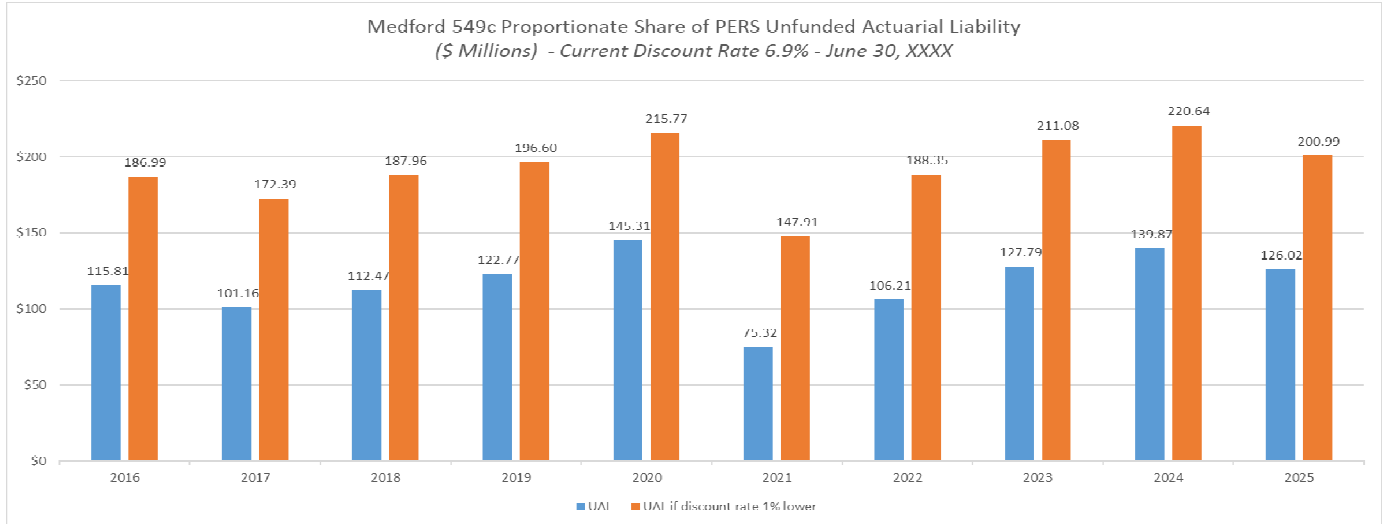
General Fund Expenditures - Associated Payroll Costs

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
PERS	22,604,974	22,792,343	25,752,244	26,174,104	26,174,104	
Social Security	4,621,416	4,723,386	5,429,616	5,544,803	5,544,803	
Medicare	1,083,942	1,108,555	1,269,658	1,299,107	1,299,107	
Workers Compensation	233,341	434,993	400,319	417,491	417,491	
Unemployment	82,497	18,801	409,522	898,305	898,305	
Oregon Paid Leave	306,288	313,260	325,169	337,211	337,211	
Health Insurance	15,581,184	14,511,482	15,429,906	15,695,988	15,695,988	
Life Insurance	17,289	176,664	115,378	119,981	119,981	
TSA Exec ER Paid	1,064,134	1,085,321	1,216,501	1,208,499	1,208,499	
Long Term Disability	176,605	98,319	117,323	119,233	119,233	
FSA/HSA	648,818	422,565	680,600	677,671	677,671	
403B/457B ER Match	299,898	286,521	217,397	216,140	216,140	
Post Retirement Healthcare	599,050	589,214	493,112	506,308	506,308	
BENEFITS	47,319,436	46,561,424	51,856,744	53,214,841	53,214,841	



Total General Fund Associated Payroll Costs are up \$1.36M or 2.6% to \$53.2M from \$51.8M in the prior year. There is a \$2.03M increase from the associated payroll costs on COLA and STEP wage increases. Other changes include an increase is a \$0.49M increase for Unemployment and \$0.27M for healthcare. These increases are partially offset by a -\$1.02M savings from FTE reductions, -\$0.29M savings on the vacancy assumption and all other changes total a savings of -\$0.10M.

Medford SD 549c Proportionate Share Of PERS UAL



This chart shows the change over time in the MSD's proportionate share of Oregon Public Employees Retirement System (PERS) Unfunded Actuarial Liability (UAL) as measured by Milliman actuaries for the State of Oregon. This information is required to be reported as part of Government Accounting Standards Board (GASB) statement #68. Long term targeted earnings assumptions for PERS retirement assets have changed slightly over the years dropping from 7.75% in 2015 actuarial reporting to 6.9% in 2021 actuarial reporting. The blue bar in the chart above is our District's estimated proportionate share of the UAL assuming PERS assets have a return at the targeted rate. The orange bar is the UAL assuming actual earnings are 1% below the targeted rate. Over the last ten years, the UAL assuming the long term earnings at the targeted rate has grown \$10.21M or 8.8%, from \$115.81M in 2016 to \$126.02M in 2025

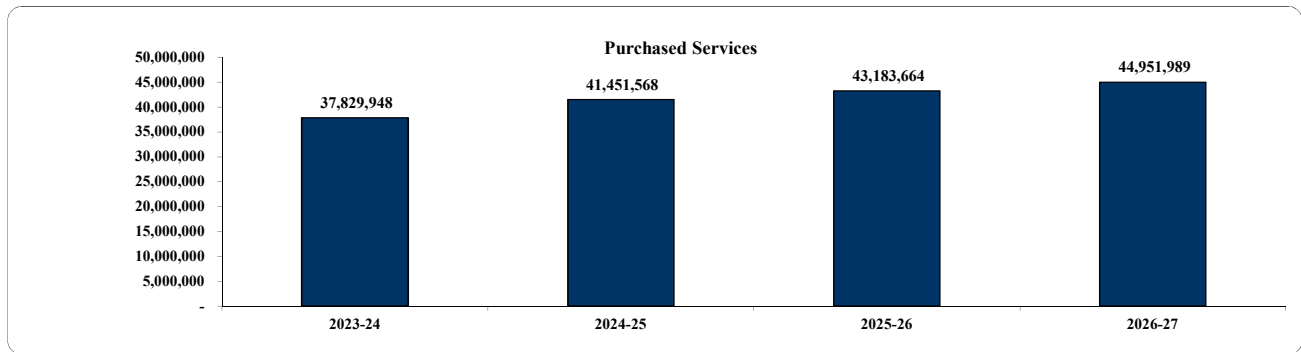
PERS investment returns have been below the 6.9% target, three of the last four years.

As a side note, as part of our full faith & credit bond issuance, Moody's did a review of District financials including pension obligations. Moody's uses 3.51% as the discount rate for all school district pension programs regardless of state, and they estimate Medford's pension debt closer to \$450 M at the 3.51% discount rate.

The District will be closely monitoring future PERS actuarial reports and future employer rate expectations for the 2027-29 biennium and beyond. At this point, there is a large \$1.6 billion overall increase to PERS employer contributions projected for the 2027-29 biennium.

General Fund Expenditures - Purchased Services Summary

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Management Services	60,175	56,714	80,000	70,000	70,000	
Professional Growth	215,749	149,961	178,220	265,550	265,550	
Pro/Tech Service - Instructional	1,881,502	1,981,485	1,967,528	2,376,878	2,376,878	
Cleaning Service	2,670	12,917	5,800	1,800	1,800	
Repair and Maintenance	1,749,840	2,574,454	2,424,508	2,641,300	2,641,300	
Lease & Rental	648,457	503,730	880,000	667,700	667,700	
Electricity	1,707,008	1,914,169	2,063,000	2,163,000	2,163,000	
Natural Gas	445,377	439,118	467,000	490,350	490,350	
Water/Sewer	633,525	690,818	784,280	859,280	859,280	
Garbage	297,644	275,155	316,200	325,686	325,686	
Other Property Services	22,368	22,876	70,000	35,000	35,000	
Pupil Transportation	5,665,854	6,289,873	7,037,065	7,284,162	7,284,162	
Pupil Transportation - Other	53,258	76,354	109,725	89,850	89,850	
Travel & Training - In District	23,418	20,915	29,639	30,618	30,618	
Travel & Training - Out of District	243,219	275,817	166,621	161,747	161,747	
Telephone	376,619	361,460	350,000	360,000	360,000	
Postage	24,297	51,074	47,437	50,100	50,100	
Advertising	84,550	49,519	56,300	58,000	58,000	
Printing	324	-	5,000	55,000	55,000	
Charter School Payments	18,737,350	20,246,137	21,010,994	21,851,434	21,851,434	
Tuition	13,313	5,742	52,600	53,000	53,000	
Audit Services	63,580	53,261	60,000	60,000	60,000	
Legal	70,254	167,491	155,000	145,000	145,000	
Architect/Engineering Services	75,887	29,750	80,000	60,000	60,000	
Negotiations	59,604	24	45,000	45,000	45,000	
Elections	-	27,836	20,000	30,000	30,000	
Professional Services - Tech/Non-Instr	1,674,258	1,414,723	1,778,664	1,532,450	1,532,450	
Other General Prof/Tech Sv	18,043	-	-	-	-	
Other Licensed Subs	2,369,342	2,796,587	2,240,473	2,390,473	2,390,473	
Other Classified Subs	612,017	963,609	702,611	778,611	778,611	
PURCHASED SERVICES	37,829,948	41,451,568	43,183,664	44,951,989	44,951,989	

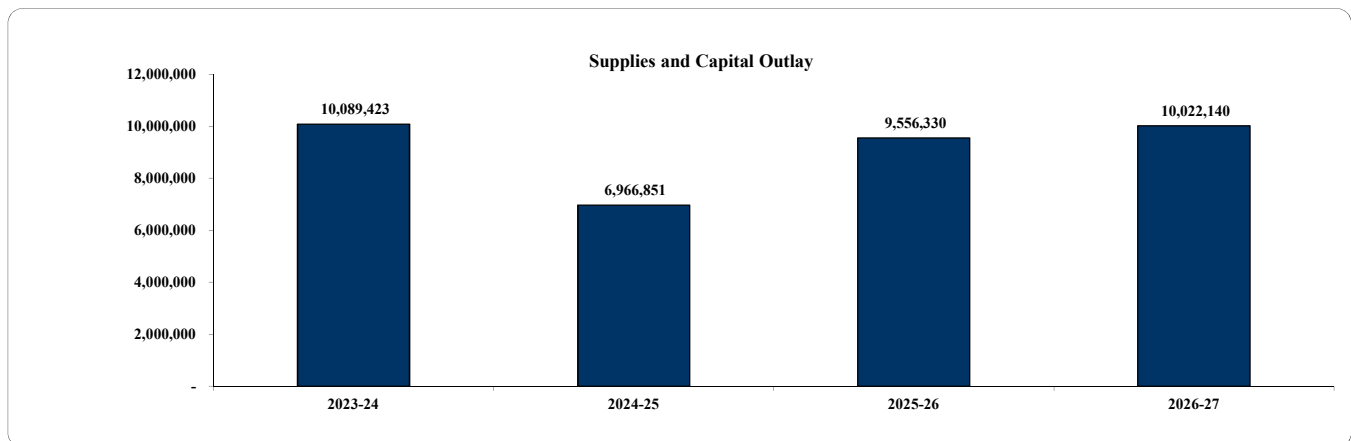


Total General Fund Purchased Services are up \$1.77M or 4.1% to \$44.9M from \$43.1M in the prior year. This is due to an increase in utilities of \$0.2M, an increase in pupil transportation of \$0.23, and charter school pass through payments of \$0.84M. The decrease in Professional Services Non-Instructional of -\$0.24M is mainly due to the decrease in VIDA and Vitality benefits apps. There is an increase in Professional Services Instructional of \$0.1M for the Foster Grandparent Program (in function 1111), \$0.15M to cover increased speech eligibility services (function 2150), and an increase of \$0.165M for 3 contracted skilled trainers (function 1240). The District contracts with Presence Learning for online speech and language services. This amount is highly variable and dependent on the number of available SLP's for hire. Repairs and maintenance has an increase of \$0.2M based on prior year numbers and contractor price escalation. The remaining variance is due to the ever-increasing substitute usage in our district (an increase of \$0.23M).

General Fund Expenditures - Supplies & Capital Outlay Summaries

Object Description - Supplies	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Supplies and Materials	2,527,045	2,635,172	2,617,386	2,590,980	2,590,980	
Student Awards	-	615	-	-	-	
Textbooks	238,299	246,236	267,800	249,500	249,500	
Library Books	104,765	110,759	141,350	141,700	141,700	
Periodicals	5,333	2,583	6,784	5,907	5,907	
Non-Consumables	815,715	544,714	708,233	787,681	787,681	
Software	1,863,173	479,189	2,642,041	3,000,185	3,000,185	
Accelerated Reader Software	2,163	2,020	2,165	2,165	2,165	
Hardware Under \$5000	1,269,676	852,330	895,572	979,022	979,022	
SUPPLIES	6,826,169	4,873,619	7,281,330	7,757,140	7,757,140	

Object Description - Capital Outlay	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Building, Acquisition/Improvement	-	-	-	-	-	
Equipment - New	111,103	191,007	210,000	200,000	200,000	
Equipment - Replacement	70,313	179,645	165,000	165,000	165,000	
Capital Outlay - GASB 96 SBITA	2,856,138	1,226,046	1,300,000	1,300,000	1,300,000	
Capital Outlay - GASB 87 Leases	225,700	496,534	600,000	600,000	600,000	
CAPITAL OUTLAY	3,263,254	2,093,232	2,275,000	2,265,000	2,265,000	



Supplies have increased a total of \$0.475M or 6.5% from the prior year due primarily to an increase in software and hardware. Hardware is up due to the cost of equipment continuing to rise as well as more technology being added to the classrooms. The increase in software includes the 3 year renewal for Cybersecurity.

Total General Fund Capital Outlay costs are down -\$.01M or -0.44%.

GASB 96 SBITA and GASB 87 Lease costs are capital outlay offset by an equal other income entry. These are required accounting entries that have no impact to Contingency/Fund Balance.

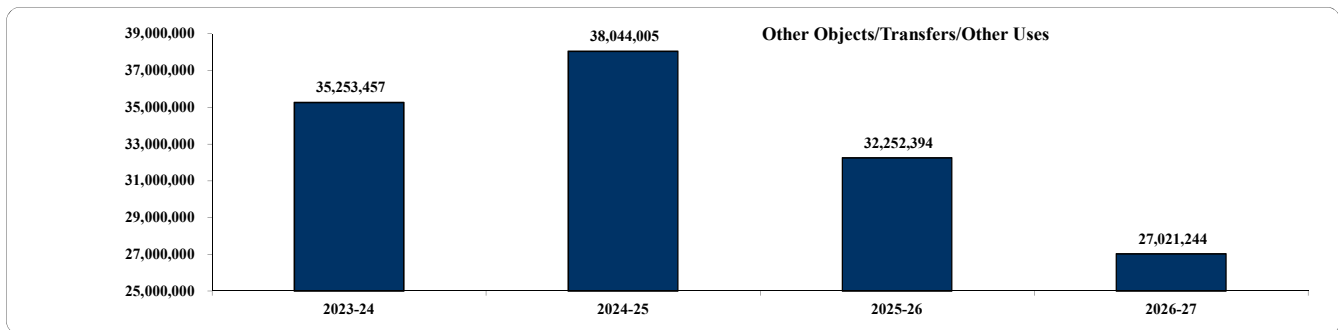
General Fund Expenditures - Other Objects & Transfers Summary

Object Description - Other Objects	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Principal - SBITA	1,426,663	1,566,593	-	-	-	-
Principal - Leases	601,147	324,068	-	-	-	-
Interest - SBITA	10,089	48,738	-	-	-	-
Interest - Lease	4,442	6,303	-	-	-	-
Dues/Fees/Memberships	353,821	242,720	316,746	330,417	330,417	-
Liability Insurance	539,214	629,738	842,130	926,343	926,343	-
Fidelity Bond	-	-	-	-	-	-
Property Insurance	614,752	646,497	829,831	995,797	995,797	-
Settlements and Judgments	44,500	-	10,000	25,000	25,000	-
PERS UAL Lump Sum Payment	-	-	-	-	-	-
Grant Indirect Charges	14,831	22,009	5,000	5,000	5,000	-
OTHER OBJECTS	3,609,459	3,486,668	2,003,707	2,282,557	2,282,557	-

Object Description - Transfers	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Interfund Transfers	-	-	-	-	-	-
Other Transfers	10,364,813	11,498,650	11,948,000	8,488,000	8,488,000	-
TRANSFERS	10,364,813	11,498,650	11,948,000	8,488,000	8,488,000	-

Object Description - Other Uses of Funds	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Contingency	21,279,185	23,058,686	18,300,686	16,250,686	16,250,686	-
Unappropriated Fund Balance	-	-	-	-	-	-
OTHER USES	21,279,185	23,058,686	18,300,686	16,250,686	16,250,686	-

TOTAL OTHER	35,253,457	38,044,005	32,252,394	27,021,244	27,021,244	-
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Total General Fund Other Objects costs have an increase of \$0.28M to the prior year due to liability and property insurance.

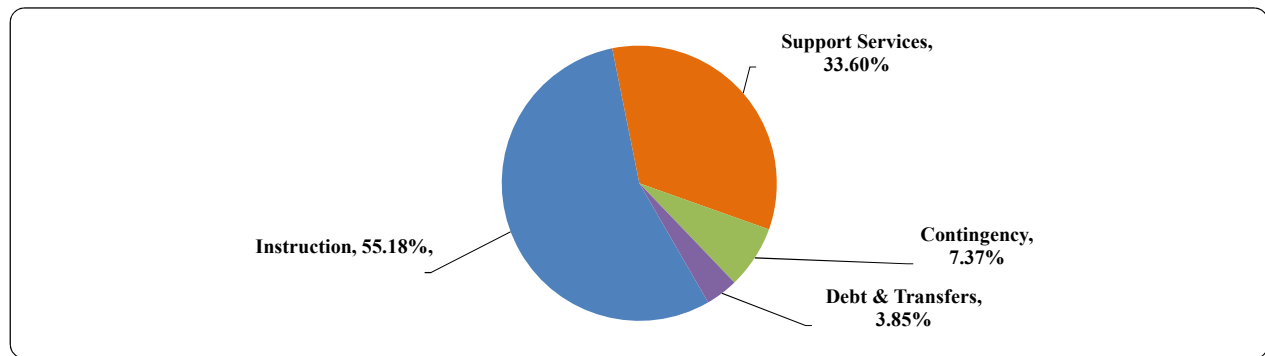
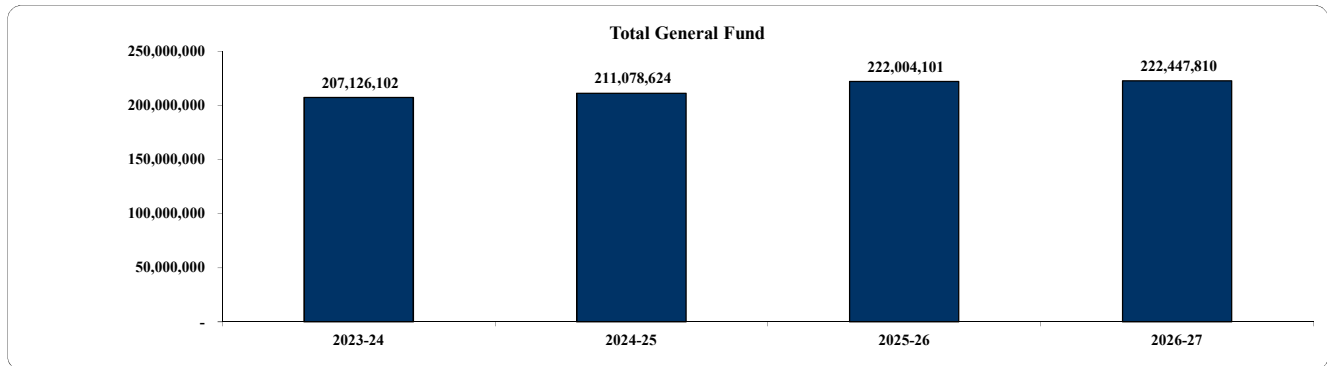
Total General Fund Transfers Out to Other Funds is down -\$3.46M, or -28.9% primarily due to a \$3.10M reduced transfer to the projects reserve fund. The General Fund is budgeting to transfer a total of \$8.488M, which will be distributed as follows: \$5.178M to the project reserve fund (p. 115) to fund Curriculum, Capital Maintenance and Repairs and IT infrastructure, \$0.575M to Special Revenue Secondary Athletics (p.112), \$0.29M to partially fund the Physical Education Expansion (PEEK) (p.111), \$0.025M for State and Local Programs (p. 109), \$1.25M for Chromebook Reserves fund (p.121), and \$1.17M to Debt Service (p.129). The detail of where these transfers are sent to can be found in the green Special Revenue section starting on page 105.

Contingency/Fund Balance Reserves of \$16.25M is the General Fund Resources minus the expenses and transfers out to other funds. The minimum fund balance reserve Board policy or contingency is 5.0% of the General Fund revenue dollars plus transfers in, not including the beginning balance. The contingency percentage for the FY26-27 Budget is 7.96%.

General Fund Requirements by Classification

Total General Fund	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Instruction*	107,091,977	107,717,450	118,780,454	121,701,808	121,701,808	-
Support Services*	65,312,501	67,081,056	71,074,960	74,107,315	74,107,315	-
Facilities*	3,082,440	1,722,782	1,900,000	1,900,000	1,900,000	-
Debt & Transfers*	10,360,000	11,498,650	11,948,000	8,488,000	8,488,000	-
Contingency*	21,279,185	23,058,686	18,300,687	16,250,687	16,250,687	-
TOTAL General Fund Uses	207,126,102	211,078,624	222,004,101	222,447,810	222,447,810	-

*Appropriation Level



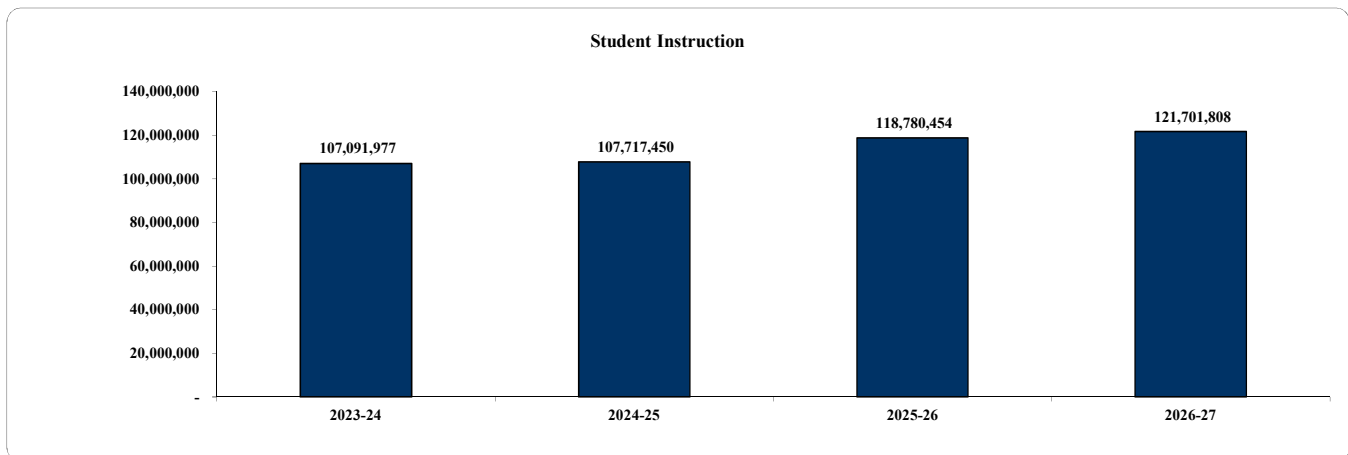
Instruction and Support Services spending are a combined total of \$195.8M, a \$6.0M or 3.2% increase from FY25-26. This is mainly due to an increase in wages from COLAs and Steps as well as associated payroll costs partially offset by FTE reductions. There is a reduction of debt & transfers out to other funds of -\$3.46M, and a reduction of contingency, -\$2.05M.

Contingency is projected to be \$16.2M or 8.0%, which is -\$2.05M less than the prior year due to deficit spending of \$1.8M on truss inspections and repairs plus \$0.25M for SpEd facility upgrades in FY26-27.

On a year-to-year basis, the District analyzes the General Fund spending as a percentage of total requirements on a relative basis by function compared to the prior year amended budget. The FY26-27 Budget for Instruction spending is 55.16% of total spending, an increase of 1.6% from the FY25-26 budget level of 53.5%. Support Services percentage of spending is 33.63%, up 1.61% from the FY25-26 Budget level of 32.0%, Contingency on a percentage basis of the total spending is -0.88% lower, and Debt & Transfers Out is a decrease of -1.53%.

General Fund Expenditures Student Instruction Functions

Student Instruction	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Elementary Programs (K-5)	31,951,790	30,215,979	33,268,281	32,753,831	32,753,831	-
Middle School Programs (6-8)	14,880,607	15,404,404	17,031,119	17,230,797	17,230,797	-
Middle School Co-Curricular	401,688	440,108	493,231	491,046	491,046	-
High School Programs (9-12)	19,364,080	19,943,241	21,243,013	21,297,160	21,297,160	-
High School Co-Curricular	977,140	1,095,878	1,084,225	1,056,785	1,056,785	-
Talented & Gifted Programs	58,281	58,024	51,264	52,824	52,824	-
Special Programs	7,139,061	6,593,379	9,193,857	11,322,017	11,322,017	-
Resource Rooms	5,993,248	6,122,476	7,167,827	7,488,667	7,488,667	-
Early Intervention Programs	850,180	882,010	1,044,079	1,083,296	1,083,296	-
Alternative Education	489,589	667,173	634,406	181,859	181,859	-
High School Online	168,689	-	-	-	-	-
K-8 Online School	900,727	547,406	-	-	-	-
Charter Schools	18,737,350	20,246,137	21,010,994	21,851,434	21,851,434	-
English Language Learners	4,434,450	4,750,771	5,460,604	5,767,451	5,767,451	-
Teen Parent Program	352,556	393,701	473,390	504,003	504,003	-
Homebound Program	51,198	49,390	226,727	234,463	234,463	-
Homeschool Connection	-	186	120,251	124,109	124,109	-
At-Risk Program	75,000	75,000	75,000	75,000	75,000	-
Summer School - High School	266,344	232,187	202,184	187,068	187,068	-
STUDENT INSTRUCTION	107,091,977	107,717,450	118,780,454	121,701,808	121,701,808	-



In FY26-27, MSD will have 20 non-charter schools, 4 charter schools, and 1 homeschool option, and is projected to serve approximately 13,341 students, including 2,087 charter students. Total FY26-27 Budget spending for Student Instruction is \$121.7M, up \$2.9M (2.5%) from the FY25-26 Budget of \$118.7M. The increase in spending is primarily driven by COLA and STEP salary and associated payroll cost increases partially offset by FTE reductions.

There will be an decrease of 19.55 FTE in the General Fund (see pages 17-21 for more details)

In FY23-24, all 6th graders were moved from elementary to middle school, which is now grades 6 through 8.

Consolidated Student Services: Special Education (SpEd) and Student Wellness Spending Summary

SW: Student Wellness

(Excludes District Transportation)					
	FY26-27	FY25-26	FY24-25	Change from	Change from
	Approved Budget	Budget	Actual	FY25-26	FY24-25
General Fund					
Self Contained Programs (1220, 1240)	11,322,017	9,193,857	6,593,379	2,128,160	4,728,637
ERT/Resource Rooms (1250)	7,488,667	7,167,827	6,122,476	320,840	1,366,192
Early Intervention Programs (1260, 1261)	1,083,296	1,044,079	882,010	39,217	201,286
Psychological Services (2140) (SpEd & SW)	1,269,529	1,205,559	1,328,491	63,970	(58,962)
Speech and Audiology (2150)	4,587,694	4,311,470	3,566,657	276,224	1,021,037
Occupational Th/Autism Spc (2160)	379,359	367,563	355,965	11,795	23,394
Student Support Services (2190)	1,221,006	1,119,128	904,052	101,878	316,954
Total General Fund	27,351,568	24,409,485	19,753,031	2,942,085	7,598,537
Special Revenue Funds					
IDEA Part B	2,100,000	2,129,492	2,581,151	(29,492)	(481,151)
IDEA 619 Funds	19,048	19,048	26,511	-	(7,463)
Juvenile Detention Education Program (JDEP) (Wellness)	-	38,347	68,647	(38,347)	(68,647)
Student Investment Act (SpEd)	2,485,414	2,390,398	2,890,078	95,016	(404,664)
SIA (Behavior Specialists) (SpEd and Non SpEd)	1,252,002	1,204,348	1,342,056	47,654	(90,054)
Total Special Revenue Funds	5,856,464	5,781,633	6,908,443	74,831	(557,261)
TOTAL District SpEd SPENDING	33,208,032	30,191,118	26,661,474	3,016,916	7,041,277
SpEd Transportation	2,329,726	2,261,870	2,261,870	67,856	67,856
SOESD SpEd on Behalf of Medford 549C *	2,613,273	2,537,158	2,537,158	76,115	76,115
TOTAL SPED SPENDING	38,151,031	34,990,146	31,460,502	3,160,887	7,185,248

	FY26-27	FY25-26	FY24-25	Change from	Change from
	Approved Budget	Budget	Actual	FY25-26	FY24-25
Total General Fund FTE	249.51	232.51	198.20	17.00	51.31
Special Revenue Funds FTE	42.16	42.16	53.63	-	(11.47)
TOTAL SpEd STAFFING	291.67	274.67	251.83	17.00	22.84

Total Spending for Special Education (SpEd) & Student Wellness in the General Fund including transportation in the FY26-27 Budget is \$38.15M up \$3.16M or 9.0%. Total staffing across all funds is 290.67 FTE, which is an increase of 17 FTE to the current staffing. The JDEP program will transfer to SOESD in 2026-27.

A more detailed explanation of each functional area is explained in the narrative of the following pages.

In FY25-26 the District served approximately 2,382 Special Education Students with most students receiving services in more than one area. Services provided include 1,466 students in Education Resource Centers across all schools, 1,480 students in Speech-Language Therapy, 1,069 students in Assessment and Evaluation, 378 students in Self-contained Classes (MAPS and FOCUS - at 13 schools), 32 students in the Transitions School (for 18-21 year old students), 183 students in Occupational Therapy, 6 students who are in the deaf or hard of hearing program, and 19 students in steps classes operated by SOESD at two District schools, schools in other districts, and American Sign Language (ASL) interpreters for students who are deaf or hearing impaired.

Staffing Job Description	FY26-27	FY25-26	FY24-25
Maps and Focus (1220,1240)	139.97	122.97	111.99
ERC - Resource Rooms (1250)	97.28	97.28	96.03
Early Intervention Childhood (1260, 1261)	13.22	13.22	3.00
Psychological Services (2140)	8.00	8.00	10.00
Speech and Audiology Services (2150)	22.19	22.19	17.80
Occupational Therapy/Autism (2160)	5.00	5.00	7.00
Support Services (2190)	6.00	6.00	6.00
Total FTE	291.67	274.67	251.83

* Estimate: SOESD Service Plan for FY26-27 still under development.

Special Education Child Count (SECC)

As of December xxxx

Year	SECC Count	SECC % of ADMr	1 Year Change	2 Year Change	3 Year Change	4 Year Change	5 Year Change
2025	2359	17.59%	1.81%	6.69%	11.06%	9.87%	11.4%
2024	2317	16.90%	4.79%	9.09%	7.92%	9.45%	
2023	2211	16.13%	4.10%	2.98%	4.44%		
2022	2124	15.41%	-1.07%	0.33%			
2021	2147	15.19%	1.42%				
2020	2117	14.76%					
	Dist ADMr						
Year	Inc. Charter Schools		1 Year Change	2 Year Change	3 Year Change	4 Year Change	5 Year Change
2025	13413		-2.17%	-2.14%	-2.71%	-5.10%	-6.5%
2024	13710		0.03%	-0.56%	-3.00%	-4.42%	
2023	13706		-0.59%	-3.03%	-4.45%		
2022	13787		-2.46%	-3.88%			
2021	14134		-1.46%				
2020	14344						

Note 1: At 17.59% SECC, the 11% cap on IEP students results in an unfunded mandate of approximately \$10 M.

Note 2: At the same time, total District enrollment (ADMr) has declined 6.5% since 2020, special education enrollment has increased 11.4%.

General Fund Music Programs Spending Summary Across All Funds

<i>(All General Fund)</i>	FY26-27 Budget	FY25-26 Budget	Change from FY25-26 Budget
<u>Elementary School</u>			
- Music	1,353,936	1,304,001	49,935
Total Elementary School	1,353,936	1,304,001	49,935
<u>Middle School</u>			
- Music	927,674	867,180	60,494
- Band	7,511	10,983	(3,472)
- Orchestra	5,159	7,157	(1,998)
- Vocal	6,791	7,654	(863)
Total Middle School	947,135	892,974	54,161
<u>High School</u>			
- Music	951,396	870,290	81,106
- Band	32,145	36,599	(4,454)
- Orchestra	21,419	23,551	(2,132)
- Vocal	21,756	29,685	(7,929)
Total High School	1,026,716	960,125	66,591
<u>TOTAL MUSIC</u>			
- Music	3,233,006	3,041,471	191,535
- Band	39,656	47,582	(7,926)
- Orchestra	26,578	30,708	(4,130)
- Vocal	28,547	37,339	(8,792)
TOTAL MUSIC SPENDING	3,327,787	3,157,100	170,687

	FY26-27 Budget	FY25-26 Budget	Variance
<u>Elementary School FTE</u>	10.56	10.56	-
<u>Middle School FTE</u>	7.82	7.82	-
<u>High School FTE</u>	6.18	6.18	-
Total Music Staffing	24.56	24.56	-

The District music program serves students from Kindergarten through 12th grade. The vast majority of the costs are for salaries and stipends for expertise in music instruction, with a small amount included for supplies. Salaries and FTE schedules are charged to either the elementary, middle school or high school functions according to where the instructor teaches. Music staffing is remaining the same.

Students in Kindergarten through 5th grade receive a minimum of 40 minutes of general music instruction each week. Beginning in middle school, students may elect to participate in choir or an instrumental music program.

At the high school level, music selections expand with a variety of vocal and instrumental selections being offered, including choices such as concert band, wind ensemble, jazz band, chamber orchestra, treble choir, men's choir, and more. Concerts are held regularly to showcase student learning. Music Directors often combine multiple levels of students in each concert giving the younger musicians an opportunity to hear what they will sound like in middle and high school.

Notes Page



General Fund Detail Budget - 1111 Elementary Programs (K-5)

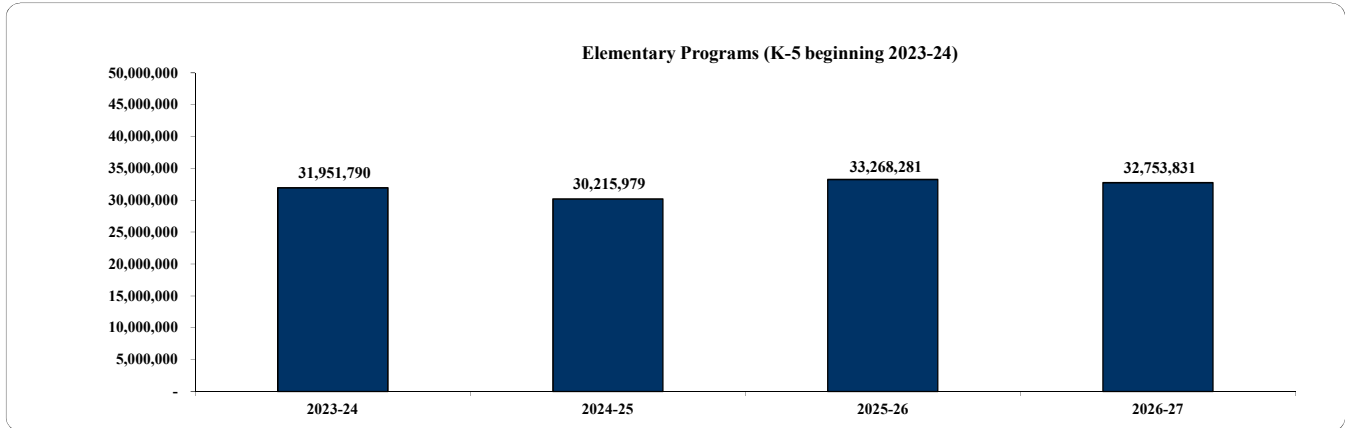
All non-charter students K-5 beginning 2023-24

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	15,634,980	14,958,616	16,215,824	16,050,862	16,050,862	
Classified	1,817,579	1,960,114	2,242,292	2,206,355	2,206,355	
Licensed Substitutes	27,402	-	12,360	12,360	12,360	
Licensed Temporary	67,768	5,397	124,472	74,472	74,472	
Classified Temporary	1,757	1,603	47,404	47,404	47,404	
Additional Salary	-	3,000	25,000	-	-	
Classified Overtime	44,617	40,571	88,023	88,023	88,023	
Extra Duty Compensation	13,215	35,043	41,256	41,256	41,256	
Insurance Opt Out	79,052	194,734	117,600	117,600	117,600	
SALARIES & WAGES	17,686,369	17,199,078	18,914,230	18,638,332	18,638,332	
PERS	5,874,147	5,542,439	6,464,620	6,353,808	6,353,808	
Social Security	1,091,195	1,065,286	1,222,788	1,211,572	1,211,572	
Medicare	255,199	249,139	285,975	283,352	283,352	
Workers Compensation	54,960	100,686	91,117	91,619	91,619	
Unemployment	18,421	4,254	93,879	198,310	198,310	
Oregon Paid Leave	73,462	70,707	73,997	74,352	74,352	
Health Insurance	3,965,318	3,494,335	3,575,806	3,350,640	3,350,640	
Life Insurance	3,510	41,601	95,582	34,057	34,057	
TSA Exec ER Paid	297,913	289,259	299,800	288,000	288,000	
Long Term Disability	61,924	23,567	25,055	26,527	26,527	
FSA/HSA	144,587	103,511	116,400	116,400	116,400	
TSA Classified ER Paid Health Insurance Option	26,709	23,078	42,130	42,130	42,130	
BENEFITS	11,867,345	11,007,861	12,387,149	12,070,766	12,070,766	
Professional Growth	4,240	3,266	3,000	3,000	3,000	
Professional Instr. Services	128,599	127,806	25,278	130,278	130,278	
Repair/Maintenance/Rentals	1,085	608	2,000	1,500	1,500	
Garbage	254	49	-	-	-	
Pupil Transportation	415	4,828	235	393	393	
Transportation	4,338	1,227	-	-	-	
Travel - In District	13	36	400	400	400	
Travel - Out of District	872	2,068	1,900	2,200	2,200	
Advertising	511	-	-	-	-	
Postage	82	111	-	-	-	
Professional Services - Tech	8,598	337	600	600	600	
Other Licensed Subs	932,594	928,286	780,390	825,390	825,390	
Other Classified Subs	299,006	268,728	170,362	195,362	195,362	
PURCHASED SERVICES	1,380,607	1,337,350	984,165	1,159,124	1,159,124	
Supplies and Materials	394,425	404,912	510,465	491,338	491,338	
Textbooks	75,070	139,530	140,200	140,200	140,200	
Periodicals	2,517	-	1,750	1,750	1,750	
Non-Consumables	18,041	11,057	24,222	22,322	22,322	
Software	420,062	(135,309)	297,600	219,625	219,625	
Hardware/Equipment	117	283	2,432	2,282	2,282	
SUPPLIES	910,233	420,474	976,668	877,517	877,517	
Principal - SBITA	89,291	227,423	-	-	-	
Interest - SBITA	-	8,207	-	-	-	
Dues/Fees/Memberships	17,752	15,586	6,069	8,092	8,092	
OTHER OBJECTS	107,042	251,216	6,069	8,092	8,092	
Other Transfer	193	-	-	-	-	
ELEMENTARY PROGRAMS (K-5)	31,951,790	30,215,979	33,268,281	32,753,831	32,753,831	

General Fund Detail Budget - 1111 Elementary Programs (K-5)

All non-charter students K-5 beginning 2023-24

1111 Elementary Programs (K-5) Continued



In FY26-27, function 1111 serves approximately 4,865 students across 13 Elementary Schools and (1) K-8 School. In FY26-27 the budget is \$32.7M is \$0.5M or -1.5% lower than FY25-26. Staffing across all funds is 290.61 FTE, which is -16.75 FTE less (-13.0 FTE Certificated and -3.75 FTE Classified) than the FY25-26 amended budget primarily due to declining enrollment.

The software budget includes our iReady Diagnostic subscription. We have been able to use Early Literacy grant funds to purchase K-3 instructional materials. Aside from software, most other areas of the budget is largely equal to the prior year. There is an increase in Professional Technical Services for the Foster Grandparent Program. There is an increase of \$70K due to the ever-increasing usage of substitutes in our classrooms. Targeted classroom ranges by grade for FY25-26 are as follows: Kindergarten: 18-22, 1st grade: 20-22, 2nd grade: 22-26, 3rd grade: 24-26, 4th grade: 26-28 and 5th grade 26-29.

Elementary After School Programs

The District completed a request for proposal (RFP) process at the end of FY24-25 to select afterschool providers for 13 elementary schools beginning the FY25-26 school year. Both contracts were approved to continue through, August, 2028.

Prior to the 25/26 school year, the District supplemented a combination of \$150,000 from Title I funds, \$113,000 from the General Fund, and an in-kind contribution of rent-free facilities. The general fund contribution was eliminated beginning the FY25/26 budget, meaning after school programs are only supported through Title Funds.

Innovation Learning operates contracted afterschool programs at Abraham Lincoln, Hoover, Jacksonville, and Lone Pine. Kids Unlimited operates contracted afterschool programs at Griffin Creek, Howard, Jackson, Jefferson, Kennedy, Oak Grove, Roosevelt, Washington, and Wilson.

General Fund Detail Budget - 1121 Middle School (Except Co-Curricular)

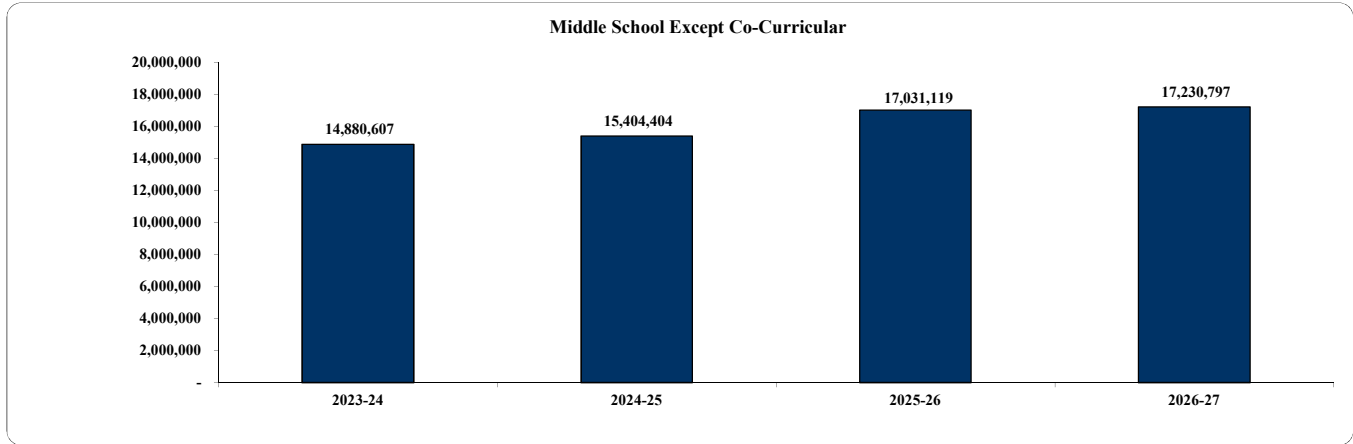
All non-charter students Grades 6-8 beginning 2023-24

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	7,901,281	7,981,276	8,783,759	8,890,507	8,890,507	
Classified	508,600	630,665	706,847	735,085	735,085	
Licensed Temporary	9,040	12,672	11,831	293	293	
Classified Temporary	2,219	2,538	15,773	15,773	15,773	
Additional Salary	-	4,500	40,000	-	-	
Classified Overtime	15,418	13,837	12,568	12,568	12,568	
Extra Duty Compensation	106,814	150,804	151,793	152,561	152,561	
Insurance Opt Out	25,641	84,473	62,400	62,400	62,400	
SALARIES & WAGES	8,569,012	8,880,766	9,784,972	9,869,188	9,869,188	
PERS	2,690,374	2,790,218	3,169,547	3,131,011	3,131,011	
Social Security	515,979	536,154	637,511	649,552	649,552	
Medicare	120,672	125,391	149,095	151,911	151,911	
Workers Compensation	25,410	51,818	47,505	49,102	49,102	
Unemployment	8,632	2,138	47,061	106,281	106,281	
Oregon Paid Leave	34,343	35,533	39,210	40,209	40,209	
Health Insurance	1,724,334	1,600,790	1,761,260	1,806,585	1,806,585	
Life Insurance	1,563	20,189	2,732	13,904	13,904	
TSA Exec ER Paid	104,777	126,218	164,600	165,200	165,200	
Long Term Disability	19,015	18,612	14,938	15,797	15,797	
FSA/HSA	72,946	47,126	65,600	65,600	65,600	
TSA Classified ER Paid Health Insurance Option	8,935	6,736	21,107	28,107	28,107	
BENEFITS	5,326,979	5,360,921	6,120,166	6,223,260	6,223,260	
Professional Growth	17,867	-	5,375	-	-	
Professional Instr. Services	4,638	1,971	350	-	-	
Repair/Maintenance	6,496	8,643	9,000	17,000	17,000	
Rental Expense	-	980	-	-	-	
Pupil Transportation	1,350	2,056	2,330	2,084	2,084	
Pupil Transportation OTHTS	2,978	572	-	-	-	
Travel - In District	33	123	550	550	550	
Travel - Out of District	885	3,738	2,521	2,459	2,459	
Postage	34	-	165	40	40	
Professional Services	12,335	4,429	10,450	8,200	8,200	
Other Licensed Subs	443,048	669,099	464,011	509,011	509,011	
Other Classified Subs	54,232	82,370	71,434	96,434	96,434	
PURCHASED SERVICES	543,897	773,982	566,186	635,777	635,777	
Supplies and Materials	160,435	163,718	240,229	237,932	237,932	
Textbooks	42,101	56,909	62,500	31,000	31,000	
Library Books	-	111	-	-	-	
Periodicals	-	443	-	-	-	
Non-Consumables	23,815	14,216	6,355	5,855	5,855	
Software	(41,286)	61,675	241,641	219,315	219,315	
Hardware /Equipment	131	39	5,090	4,590	4,590	
SUPPLIES	185,195	297,111	555,815	498,692	498,692	
Principal - SBITA	233,358	87,019	-	-	-	
Dues/Fees/Memberships	12,121	4,606	3,980	3,880	3,880	
Settlements & Judgements	10,000	-	-	-	-	
OTHER OBJECTS	255,479	91,625	3,980	3,880	3,880	
Other Transfers	44	-	-	-	-	
MIDDLE SCHOOL-EXCEPT CO-CURR.	14,880,607	15,404,404	17,031,119	17,230,797	17,230,797	

General Fund Detail Budget- 1121 Middle School (Except Co-Curricular)

All non charter students Grades 6-8 beginning 2023-24

1121 Middle School
Except Co-Curricular Continued



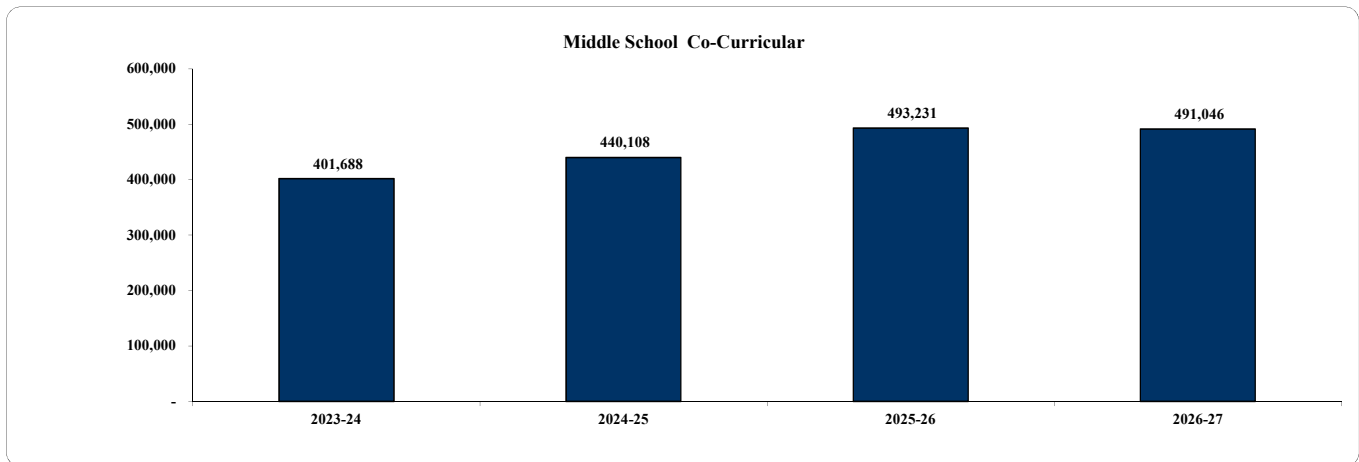
In FY26-27, function 1121 will serve approximately 2,606 middle school students, grades six through eight. The software budget includes our iReady Diagnostic subscription as well as costs for digital and physical instructional materials.

The FY26-27 Budget is \$17.2M, up \$0.2M and 1.1% over the FY25-26 Budget. The increase is primarily due to steps and COLA wage increases, offset by a reduction of 4.0 FTE certificated staffing. Staffing across all functions in this function is a total of 136.65 FTE.

The FY26-27 school year targeted student to licensed staff ratio is 1 to 23.

General Fund Detail Budget - 1122 Middle School (Co-Curricular)

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	142,051	22,263	-	-	-	-
Extra Duty Compensation	161,015	278,425	344,279	347,305	347,305	-
Insurance Opt Out	420	1,538	4,800	-	-	-
SALARIES & WAGES	303,486	302,226	349,079	347,305	347,305	-
PERS	64,518	68,799	79,624	82,032	82,032	-
Social Security	18,506	18,488	22,475	22,662	22,662	-
Medicare	4,328	4,324	5,256	5,300	5,300	-
Workers Compensation	1,204	1,422	1,675	1,689	1,689	-
Unemployment	303	73	1,691	3,655	3,655	-
Oregon Paid Leave	1,214	1,209	333	425	425	-
Health Insurance	5,965	28,984	-	-	-	-
Life Insurance	9	389	-	-	-	-
TSA Exec ER Paid	1,532	1,691	7,800	-	-	-
Long Term Disability	-	-	83	131	131	-
FSA/HSA	380	164	4,600	4,600	4,600	-
TSA Classified ER Paid Health Insurance Option	241	265	2,400	4,000	4,000	-
BENEFITS	98,202	125,808	125,936	124,495	124,495	-
Pupil Transportation	-	-	-	1,030	1,030	-
Other Licensed Subs	-	12,074	18,216	18,216	18,216	-
PURCHASED SERVICES	-	12,074	18,216	19,246	19,246	-
MIDDLE SCHOOL - CO-CURRICULAR	401,688	440,108	493,231	491,046	491,046	-



Function 1122 represents expenditures for stipends for middle school sports programs. See p. 112 for more information about Secondary Athletics.

Notes Page



General Fund Detail Budget - 1131 High School (Except Co-Curricular)

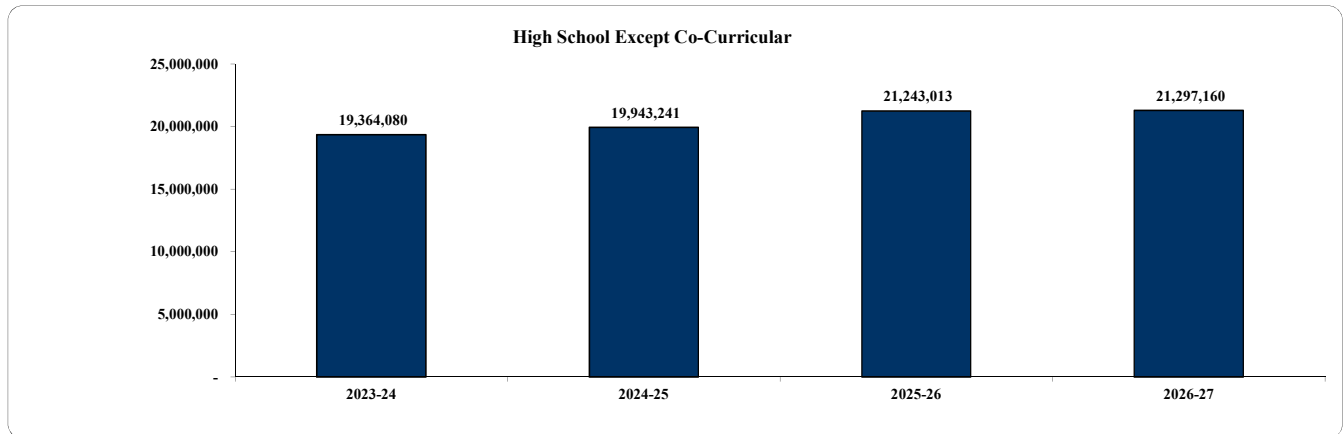
All non-charter students grades 9-12

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	10,056,638	10,370,784	10,746,148	10,763,306	10,763,306	
Classified	671,851	724,853	860,820	862,747	862,747	
Licensed Substitutes	-	-	11,330	11,330	11,330	
Classified Substitutes	-	-	56,650	56,650	56,650	
Licensed Temporary	61,322	43,888	108,974	58,974	58,974	
Classified Temporary	3,864	4,367	39,882	39,882	39,882	
Additional Salary	-	1,500	25,000	-	-	
Classified Overtime	24,248	18,730	18,697	18,697	18,697	
Extra Duty Compensation	181,653	244,238	241,487	241,487	241,487	
Insurance Opt Out	47,718	108,438	62,400	62,400	62,400	
SALARIES & WAGES	11,047,294	11,516,798	12,171,388	12,115,473	12,115,473	
PERS	3,522,240	3,623,100	3,928,384	3,897,897	3,897,897	
Social Security	662,819	694,222	782,408	785,142	785,142	
Medicare	155,014	162,358	182,983	183,622	183,622	
Workers Compensation	32,859	60,673	58,302	59,358	59,358	
Unemployment	11,255	2,772	58,743	129,511	129,511	
Oregon Paid Leave	44,194	46,103	47,717	48,532	48,532	
Health Insurance	2,268,914	2,187,303	2,336,066	2,289,412	2,289,412	
Life Insurance	2,025	26,951	4,154	17,249	17,249	
TSA Exec ER Paid	126,682	139,635	154,600	153,500	153,500	
Long Term Disability	31,033	22,594	16,825	17,371	17,371	
FSA/HSA	93,226	59,364	109,000	107,600	107,600	
TSA Classified ER Paid Health Insurance Option	11,067	8,528	34,331	35,731	35,731	
BENEFITS	6,961,328	7,033,603	7,713,514	7,724,924	7,724,924	
Professional Growth	2,258	1,017	3,000	4,000	4,000	
Professional Instr. Services	16,367	16,418	-	-	-	
Cleaning Services	1,718	1,465	5,800	1,800	1,800	
Repair and Maintenance	7,587	8,532	8,000	12,000	12,000	
Garbage	-	422	-	-	-	
Pupil Transportation	9,371	6,672	3,000	3,105	3,105	
Pupil Transportation OTHS	11,722	2,897	12,000	12,000	12,000	
Travel - In District	1,305	1,263	4,178	3,618	3,618	
Travel - Out of District	38,306	20,775	19,965	16,365	16,365	
Postage	864	227	2,200	1,000	1,000	
Tuition	8,143	4,461	50,000	50,000	50,000	
Professional Services - Other	4,531	5,164	3,633	18,250	18,250	
Other Licensed Subs	589,230	724,978	489,225	539,225	539,225	
Other Classified Subs	33,524	58,054	119,275	144,275	144,275	
PURCHASED SERVICES	724,926	852,344	720,277	805,639	805,639	
Supplies and Materials	345,657	324,860	391,764	391,599	391,599	
Textbooks	19,795	19,056	23,600	36,600	36,600	
Non-Consumables	77,935	37,649	40,120	27,024	27,024	
Software	116,114	142,291	140,800	152,000	152,000	
Hardware/Equipment	2,349	3,134	34,800	33,900	33,900	
SUPPLIES	561,850	526,990	631,084	641,123	641,123	
Equipment - New	20,474	561	-	-	-	
CAPITAL OUTLAY	20,474	561	-	-	-	
Dues/Fees/Memberships	34,130	12,945	1,750	5,000	5,000	
Settlements & Judgements	9,500	-	-	-	-	
Grant Indirect Charges	-	-	5,000	5,000	5,000	
Other Transfers	4,577	-	-	-	-	
OTHER OBJECTS	48,207	12,945	6,750	10,000	10,000	
HIGH SCHOOL-EXCEPT CO-CURR	19,364,080	19,943,241	21,243,013	21,297,160	21,297,160	

General Fund Detail Budget - 1131 High School (Except Co-Curricular)

All non-charter students grades 9-12

1131 High School Except Co-Curricular Continued



Function 1131 serves approximately 3,784 high school students across three locations.

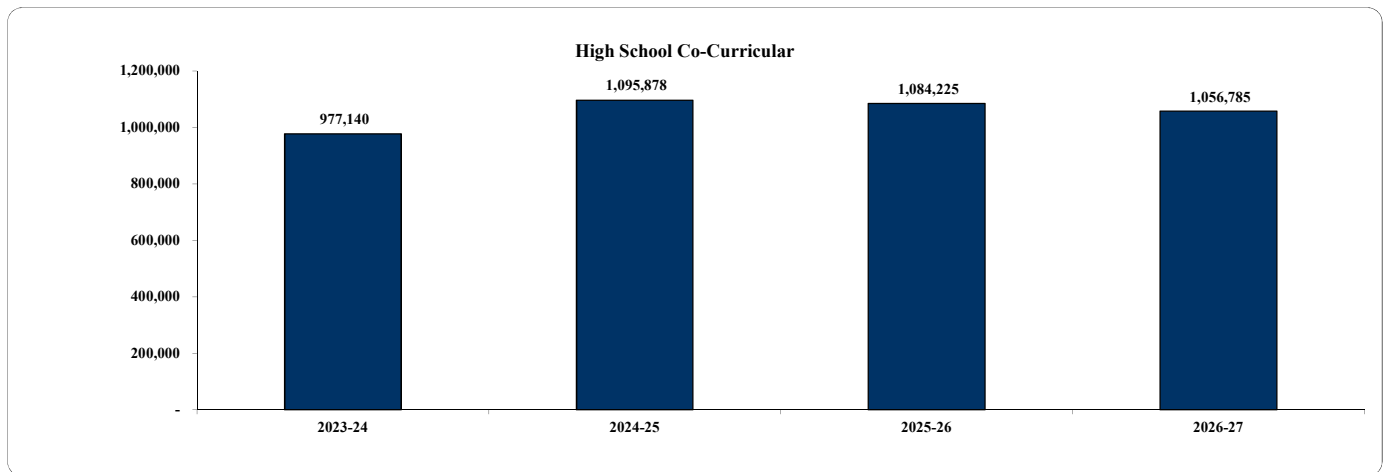
Expenditures in the FY26-27 budget is \$21.3M, up slightly from the FY25-26 Budget. This is largely due to an increase in steps and COLA wage increases offset by a reduction of 4.0 FTE certificated staffing. Total staffing across all funds for FY26-27 is 181.91 FTE.

This function includes discretionary funds at each high school, which is determined and approved by the principal at each school. It also houses several software applications that are used by the students.

The targeted licensed staff to student ratio is 1 to 27. This ratio includes General Fund programs of Math, English, Science, Social Science, CTE, PE, Arts, ESS, and excludes SpEd and ELL.

General Fund Detail Budget - 1132 High School (Co-Curricular)

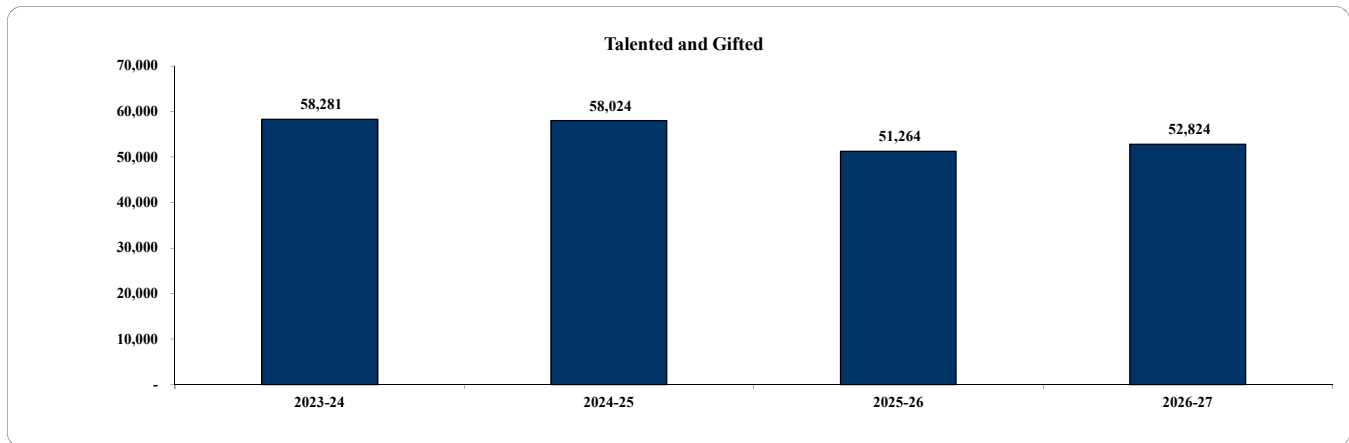
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	100,224	48,505	-	-	-	-
Extra Duty Compensation	667,951	751,436	778,294	771,366	771,366	-
Insurance Opt Out	-	244	4,800	-	-	-
SALARIES & WAGES	768,175	800,185	783,094	771,366	771,366	-
PERS	126,986	135,461	202,867	202,590	202,590	-
Social Security	47,134	49,240	48,254	47,825	47,825	-
Medicare	11,024	11,516	11,285	11,185	11,185	-
Workers Compensation	2,769	5,024	3,596	3,564	3,564	-
Unemployment	768	191	3,631	7,714	7,714	-
Oregon Paid Leave	3,073	3,209	682	654	654	-
Health Insurance	12,575	61,630	-	-	-	-
Life Insurance	11	600	-	-	-	-
TSA Exec ER Paid	2,135	3,146	11,792	-	-	-
Long Term Disability	-	-	225	279	279	-
FSA/HSA	1,769	685	12,400	8,600	8,600	-
TSA Classified ER Paid Health Insurance Option	722	1,114	6,400	3,009	3,009	-
BENEFITS	208,965	271,815	301,131	285,419	285,419	-
Other Licensed Subs	-	21,801	-	-	-	-
Other Classified Subs	-	2,076	-	-	-	-
PURCHASED SERVICES	-	23,877	-	-	-	-
HIGH SCHOOL-CO-CURRICULAR	977,140	1,095,878	1,084,225	1,056,785	1,056,785	-



Function 1132 co-curricular function maintains all positions and stipends for coaches for baseball, basketball, football, volleyball, golf, wrestling, softball, swimming, cross country, tennis, soccer, and track. The FY26-27 budget reflects expenditures for stipends for high school sports programs. Athletic expenses outside of these coaching stipend costs are identified in the Special Revenue Secondary Athletics Fund, found on p. 112 of this document.

General Fund Detail Budget - 1210 Talented and Gifted

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Classified	716	216	-	-	-	-
Licensed Temporary	10,161	17,151	10,587	10,587	10,587	-
Classified Temporary	-	813	-	-	-	-
SALARIES & WAGES	10,877	18,180	10,587	10,587	10,587	-
PERS	3,503	5,883	1,510	1,510	1,510	-
Social Security	653	1,103	699	699	699	-
Medicare	153	258	164	164	164	-
Workers Compensation	22	647	52	52	52	-
Unemployment	18	3	53	113	113	-
Oregon Paid Leave	43	73	-	-	-	-
Health Insurance	36	2,019	-	-	-	-
Life Insurance	0	29	-	-	-	-
TSA Exec ER Paid	132	146	-	-	-	-
Long Term Disability	57	14	-	-	-	-
BENEFITS	4,618	10,175	2,478	2,538	2,538	-
Professional Growth	30	-	500	500	500	-
Other Licensed Subs	-	-	689	689	689	-
PURCHASED SERVICES	30	-	1,189	1,189	1,189	-
Supplies and Materials	24,824	11,645	14,350	15,850	15,850	-
Textbooks	-	-	500	500	500	-
Software	18,338	18,025	20,000	20,000	20,000	-
SUPPLIES	43,162	29,670	34,850	36,350	36,350	-
Dues/Fees/Memberships	(405)	-	2,160	2,160	2,160	-
OTHER OBJECTS	(405)	-	2,160	2,160	2,160	-
TALENTED AND GIFTED	58,281	58,024	51,264	52,824	52,824	-



Function 1210 supports costs for the TAG program and is anticipated to serve approximately 960 students across the district, including charter schools.

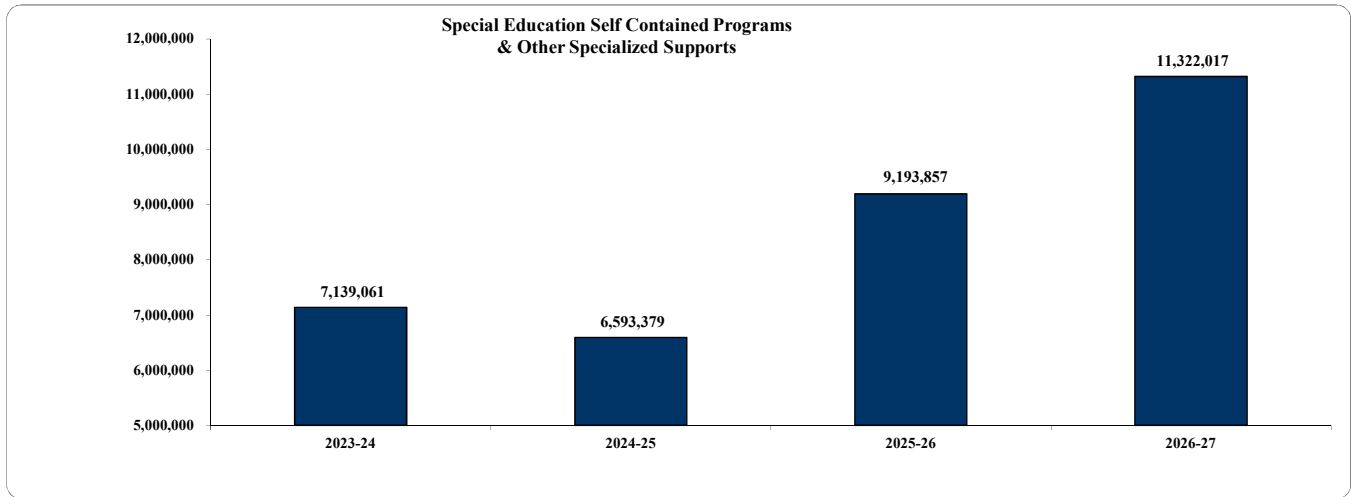
The district spends about \$28k for TAG Summer Camp. There is a small amount of dues and fees expected for FY26-27.

General Fund Detail Budget - 1220/1240 SpEd Self-Contained Programs & Other Specialized Supports

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	1,807,837	1,417,519	1,708,787	2,195,052	2,195,052	
Classified	2,267,618	2,158,237	3,467,091	4,146,798	4,146,798	
Licensed Temporary	6,216	1,948	4,322	4,322	4,322	
Classified Temporary	1,382	981	19,096	19,096	19,096	
Additional Salary	-	7,500	-	-	-	
Classified Overtime	18,727	20,551	15,360	15,360	15,360	
Extra Duty Compensation	26,490	33,247	40,548	40,548	40,548	
Insurance Opt Out	27,169	61,758	55,200	55,200	55,200	
SALARIES & WAGES	4,155,439	3,701,741	5,310,404	6,476,376	6,476,376	
PERS	1,088,032	1,008,967	1,518,455	1,813,652	1,813,652	
Social Security	250,094	226,168	346,356	418,646	418,646	
Medicare	58,490	52,894	81,003	97,909	97,909	
Workers Compensation	12,203	24,243	25,809	31,577	31,577	
Unemployment	4,190	898	29,585	68,349	68,349	
Oregon Paid Leave	16,622	14,949	20,940	25,934	25,934	
Health Insurance	1,085,825	885,372	1,314,237	1,640,534	1,640,534	
Life Insurance	1,138	8,689	2,277	1,891	1,891	
TSA Exec ER Paid	82,382	79,686	102,600	135,801	135,801	
Long Term Disability	7,889	4,117	6,681	7,087	7,087	
FSA/HSA	59,015	37,153	61,600	61,600	61,600	
TSA Classified ER Paid Health Insurance Option	25,666	22,693	12,974	14,974	14,974	
BENEFITS	2,691,544	2,365,829	3,522,517	4,317,955	4,317,955	
Professional Instr. Services	-	-	-	165,000	165,000	
Rental	2,105	489	1,500	1,500	1,500	
Travel - In District	1,778	1,896	1,000	1,000	1,000	
Travel - Out of District	-	42	50	-	-	
Other Licensed Subs	91,806	82,537	49,282	49,282	49,282	
Other Classified Subs	161,187	415,537	281,904	281,904	281,904	
PURCHASED SERVICES	256,876	500,502	333,736	498,686	498,686	
Supplies and Materials	9,376	-	700	500	500	
Non-Consumables	-	385	1,500	1,500	1,500	
Software	25,827	24,913	25,000	27,000	27,000	
SUPPLIES	35,202	25,298	27,200	29,000	29,000	
Dues/Fees/Memberships	-	9	-	-	-	
OTHER OBJECTS	-	9	-	-	-	
SPECIAL EDUCATION	7,139,061	6,593,379	9,193,857	11,322,017	11,322,017	

General Fund Detail Budget - 1220/1240 SpEd Self Contained Programs & Other Specialized Supports

1220/1240 Special Education Self-Contained Programs & Other Specialized Supports Continued

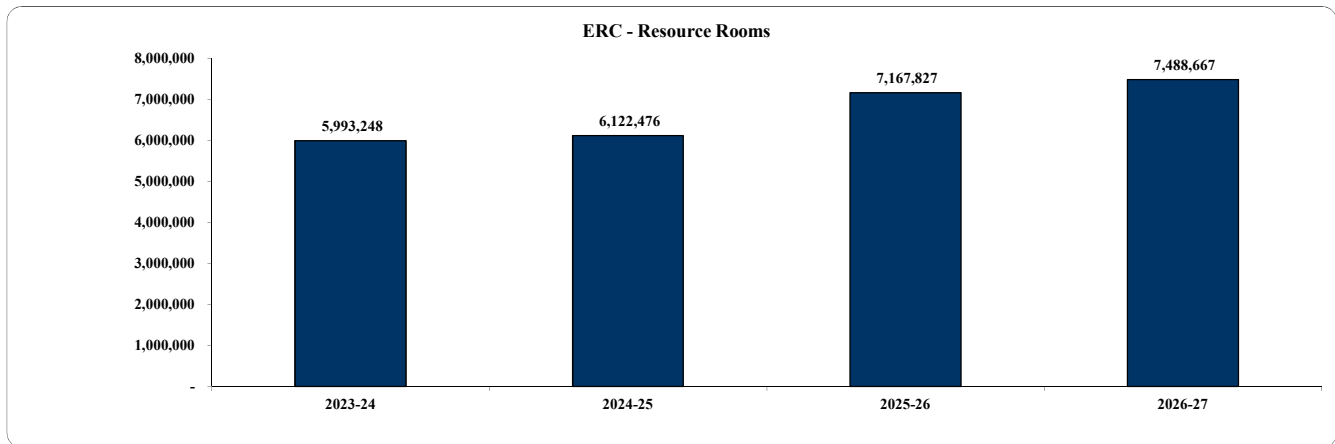


Function 1220-1240 provides funding for direct program support and instruction for approximately 378 students in FY25-26 at fifteen school sites. For a comprehensive picture of the changes to consolidated Special Education spending and staffing across all functions and funds, see the year-over-year SpEd budget comparison on pp. 29 and 30. We have also consolidated all self contained programs (MAPS and FOCUS) to this budget.

The FY26-27 Budget is funded at \$11.3M, which is a \$2.1M (23.1%) increase from the FY25-26 Budget. This is mainly due to contractual steps and COLA wage increases, an increase of 17.0 FTE in the General Fund to address increased SpEd enrollment, and a \$165K increase in Professional Instructional Services for 3 contracted skills trainers. Staffing for the FY26-27 Budget for these functions across all funds is 139.97 FTE, which is 17 FTE higher than the prior year amended FTE, due to an expected increase in SpEd student counts for FY26-27.

General Fund Detail Budget - 1250 ERC - Resource Rooms

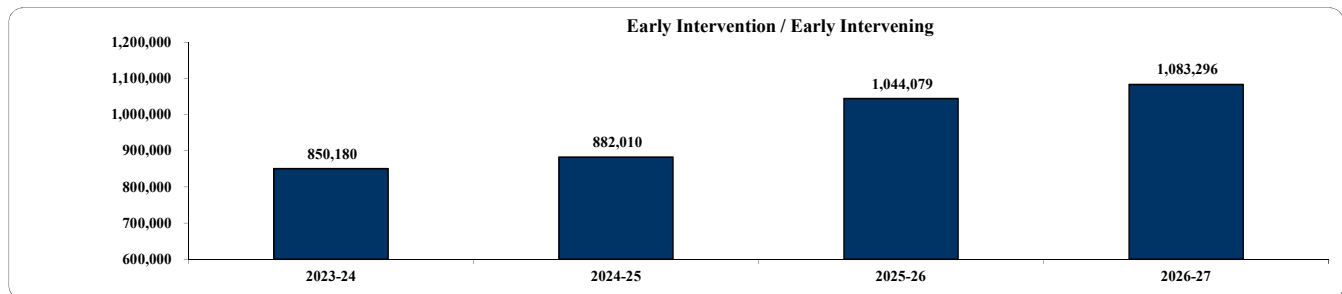
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	2,212,282	2,121,456	2,342,571	2,453,010	2,453,010	
Classified	1,269,071	1,401,368	1,704,884	1,778,365	1,778,365	
Licensed Temporary	4,201	829	10,400	10,400	10,400	
Classified Temporary	2,107	518	3,658	3,658	3,658	
Additional Salary	-	4,500	-	-	-	
Classified Overtime	7,755	9,452	12,767	12,767	12,767	
Extra Duty Compensation	33,851	48,045	95,877	95,877	95,877	
Insurance Opt Out	25,807	72,413	45,600	45,600	45,600	
SALARIES & WAGES	3,555,074	3,658,581	4,215,757	4,399,677	4,399,677	
PERS	1,022,097	1,076,673	1,193,944	1,254,515	1,254,515	
Social Security	214,219	222,530	266,648	278,051	278,051	
Medicare	50,100	52,043	62,361	65,028	65,028	
Workers Compensation	10,308	20,952	19,870	21,017	21,017	
Unemployment	3,591	890	20,742	45,490	45,490	
Oregon Paid Leave	14,227	14,814	16,197	17,190	17,190	
Health Insurance	870,512	782,196	1,010,776	1,032,421	1,032,421	
Life Insurance	981	8,287	1,766	6,187	6,187	
TSA Exec ER Paid	62,410	59,974	117,600	124,600	124,600	
Long Term Disability	8,122	3,794	5,269	5,594	5,594	
FSA/HSA	50,352	23,854	45,600	45,600	45,600	
TSA Classified ER Paid Health Insurance Option	18,329	17,234	10,676	12,676	12,676	
BENEFITS	2,325,248	2,283,241	2,771,449	2,908,369	2,908,369	
Other Licensed Subs	80,849	126,217	141,780	141,780	141,780	
Other Classified Subs	27,456	54,000	38,840	38,840	38,840	
PURCHASED SERVICES	108,351	180,217	180,620	180,620	180,620	
Supplies and Materials	4,574	265	-	-	-	
Non-Consumables	-	171	-	-	-	
SUPPLIES	4,574	436	-	-	-	
ERC / RESOURCE ROOMS	5,993,248	6,122,476	7,167,827	7,488,667	7,488,667	



Function 1250 provides special education services to approximately 1,466 students in FY25-26 across the District. The FY26-27 Budget of \$7.4M is \$0.32M or 4.5% higher than the FY25-26 Budget. This is mainly due to contractual steps and COLA wage increases. Staffing across all funds for FY26-27 is 97.28 FTE, which is the same as FY25-26.

General Fund Detail Budget - 1260 Early Intervention / 1261 Early Intervening

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	231,067	304,760	386,114	404,952	404,952	
Classified	118,317	78,111	89,759	97,926	97,926	
Licensed Temporary	4,432	1,484	-	-	-	
Classified Temporary	25	-	22,000	22,000	22,000	
Classified Overtime	588	604	-	-	-	
Extra Duty Compensation	946	5,672	4,811	4,811	4,811	
Insurance Opt Out	-	4,400	2,400	2,400	2,400	
SALARIES & WAGES	355,376	395,031	505,084	532,089	532,089	
PERS	108,903	124,441	110,947	119,782	119,782	
Social Security	21,238	23,394	29,616	31,291	31,291	
Medicare	4,967	5,471	6,926	7,318	7,318	
Workers Compensation	1,004	2,892	2,207	2,332	2,332	
Unemployment	391	94	2,561	5,047	5,047	
Oregon Paid Leave	1,421	1,589	1,823	1,931	1,931	
Health Insurance	109,870	99,150	119,512	117,564	117,564	
Life Insurance	75	957	179	624	624	
TSA Exec ER Paid	3,549	4,130	5,400	5,400	5,400	
Long Term Disability	481	267	664	709	709	
FSA/HSA	7,200	3,880	3,800	3,800	3,800	
TSA Classified ER Paid Health Insurance Option	2,149	1,228	3,610	3,610	3,610	
BENEFITS	261,249	267,493	287,245	299,407	299,407	
Professional Growth	250	-	250	300	300	
Professional Services	231,869	213,655	250,000	250,000	250,000	
Other Licensed Subs	-	323	-	-	-	
Other Classified Subs	280	5,510	-	-	-	
PURCHASED SERVICES	232,426	219,487	250,250	250,300	250,300	
Supplies and Materials	1,129	-	1,500	1,500	1,500	
SUPPLIES	1,129	-	1,500	1,500	1,500	
EARLY INTERVENTION	850,180	882,010	1,044,079	1,083,296	1,083,296	



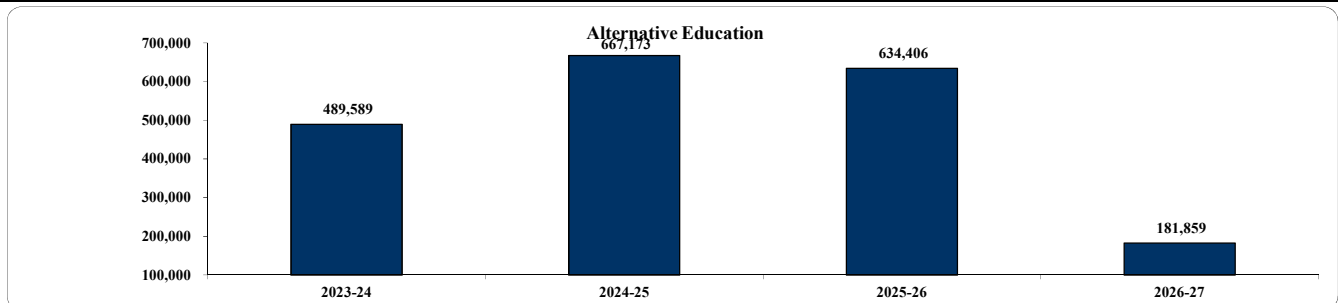
Function 1260, Early Intervention provides evaluation services for approximately 600 MSD early childhood students younger than five years old. Function 1261, Early Intervening Services, provides preventative academic and behavioral support to school age students not eligible for special education services.

Professional Services includes the cost per evaluation by DESD for an estimated 200 evaluations. Unit cost rate will remain the same of \$1235/evaluation with an anticipated increase rate in the next fiscal year to reflect COLA for them,

Across all funds, these two functions have a total of 13.22 FTE, which is flat to the current year's FTE.

General Fund Detail Budget - 1283 Alternative Education

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	221,291	311,030	290,110	94,923	94,923	
Classified	38,729	26,720	40,386	(0)	(0)	
Administrator Salaries	16,428	32,028	41,058	15,149	15,149	
Licensed Temporary	-	-	1,467	2,000	2,000	
Classified Temporary	301	1,701	415	415	415	
Classified Overtime	1,059	947	338	338	338	
SALARIES & WAGES	277,808	372,125	373,774	112,825	112,825	
PERS	87,263	120,365	94,766	7,103	7,103	
Social Security	16,581	22,381	23,984	8,239	8,239	
Medicare	3,878	5,234	5,609	1,927	1,927	
Workers Compensation	728	1,917	1,787	614	614	
Unemployment	320	89	1,186	1,329	1,329	
Oregon Paid Leave	1,111	1,494	1,380	440	440	
Health Insurance	64,742	80,003	56,660	18,826	18,826	
Life Insurance	57	985	124	41	41	
TSA Exec ER Paid	3,678	3,987	4,200	1,800	1,800	
Long Term Disability	736	287	475	108	108	
FSA/HSA	67	2,875	3,800	3,200	3,200	
TSA Classified ER Paid Health Insurance Option	1,105	922	600	-	-	
BENEFITS	180,264	240,540	194,572	43,628	43,628	
Travel - Out of District	-	1,883	-	-	-	
Other Licensed Subs	11,682	15,029	20,060	20,060	20,060	
Other Classified Subs	386	2,425	-	-	-	
PURCHASED SERVICES	12,068	19,390	20,060	20,060	20,060	
Supplies and Materials	4,183	7,237	20,000	4,346	4,346	
Library Books	-	149	-	-	-	
Non-Consumables	-	3,374	-	-	-	
Software	-	683	26,000	1,000	1,000	
SUPPLIES	4,183	11,443	46,000	5,346	5,346	
Dues/Fees/Memberships	435	1,666	-	-	-	
Grant Indirect Charges	14,831	22,009	-	-	-	
OTHER OBJECTS	15,266	23,675	-	-	-	
ALTERNATIVE EDUCATION	489,589	667,173	634,406	181,859	181,859	



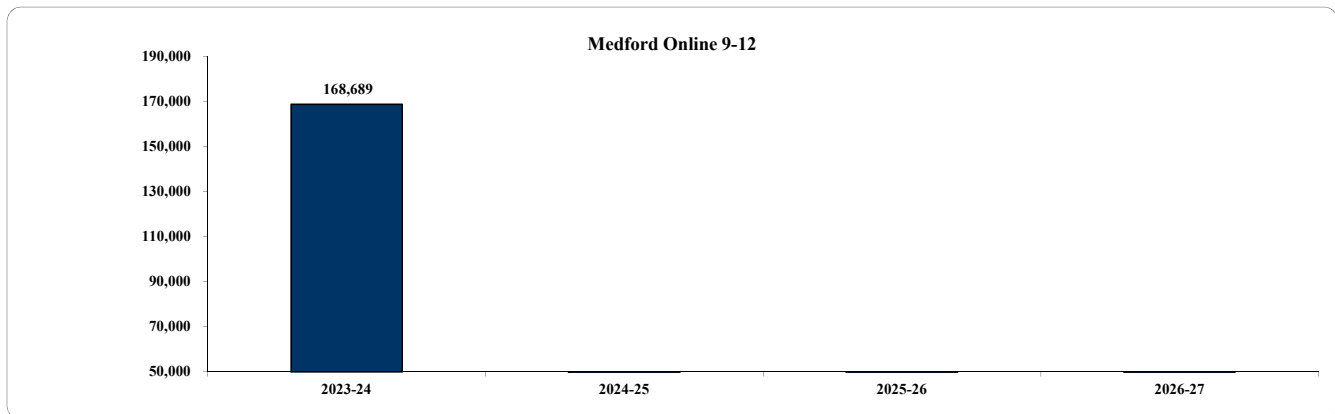
Alternative Education is the title given to programs outside of our traditional schools. The FY26-27 Budget of \$0.18M is down \$0.45M or 71.3% compared to the FY25-26 budget. The JDEP and B2B regional programs will be transferred to SOESD for 2026-27 and beyond.

This function has changed significantly in recent years from a Special Education function to Alternative Education programs and includes the Options, Options Jr., B2B, JDEP, and Medford Opportunity School (MOS). Staffing is being reduced by 4.38 FTE to a total of 1.13 FTE for FY26-27. This includes a 1.0 FTE reduction in Alternative Education, a 2.88 FTE reduction in JDEP, and a 0.5 FTE reduction in B2B.

The Options program is a classroom designated for high school students who have been expelled and/or require a smaller setting. Options Junior is a similar classroom for middle school students. The Juvenile Detention Education Program is a county-wide program for students who have been incarcerated and are in the juvenile detention building. Their education is continued in these programs until their release back to their neighborhood school.

General Fund Detail Budget - 1285 Medford Online Program 9-12

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	12,336	-	-	-	-	-
Classified	43,080	-	-	-	-	-
Classified Overtime	1,854	-	-	-	-	-
Extra Duty Compensation	1,077	-	-	-	-	-
Insurance Opt Out	2,750	-	-	-	-	-
SALARIES & WAGES	61,097	-	-	-	-	-
PERS	15,996	-	-	-	-	-
Social Security	3,530	-	-	-	-	-
Medicare	826	-	-	-	-	-
Workers Compensation	655	-	-	-	-	-
Unemployment	61	-	-	-	-	-
Oregon Paid Leave	244	-	-	-	-	-
Health Insurance	66,023	-	-	-	-	-
Life Insurance	116	-	-	-	-	-
TSA Exec ER Paid	2,276	-	-	-	-	-
Long Term Disability	-	-	-	-	-	-
FSA/HSA	1,800	-	-	-	-	-
TSA Classified ER Paid Health Insurance Option	1,189	-	-	-	-	-
BENEFITS	92,715	-	-	-	-	-
Travel - Out of District	2,397	-	-	-	-	-
Postage/Printing	107	-	-	-	-	-
Other Licensed Subs	10,256	-	-	-	-	-
Other Classified Subs	206	-	-	-	-	-
PURCHASED SERVICES	12,965	-	-	-	-	-
Supplies and Materials	1,432	-	-	-	-	-
SUPPLIES	1,432	-	-	-	-	-
Dues/Fees/Memberships	479	-	-	-	-	-
OTHER OBJECTS	479	-	-	-	-	-
ALTERNATIVE EDUCATION	168,689	-	-	-	-	-

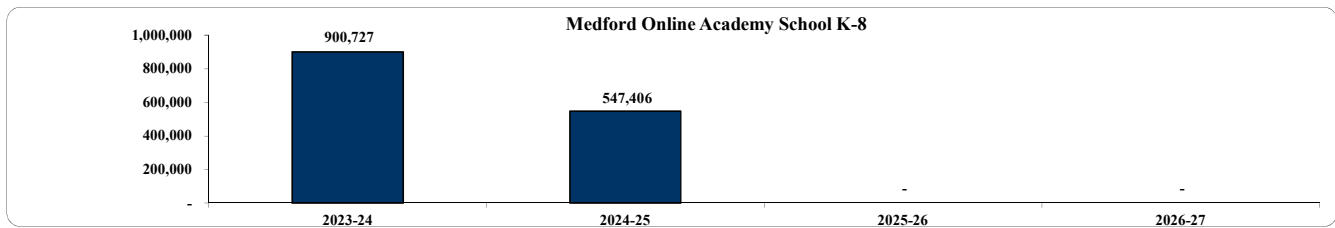


In FY23-24 the Online Program was consolidated with Innovation Academy, which will be housed under function 1131, High School (see FTE details on pp. 17-21).

Innovation Online is for grades 9 through 12 and is open to all MSD students who are interested in a full virtual learning environment. Innovation Online served 180 students in FY23-24.

General Fund Detail Budget - 1286 Medford Online Academy K-8

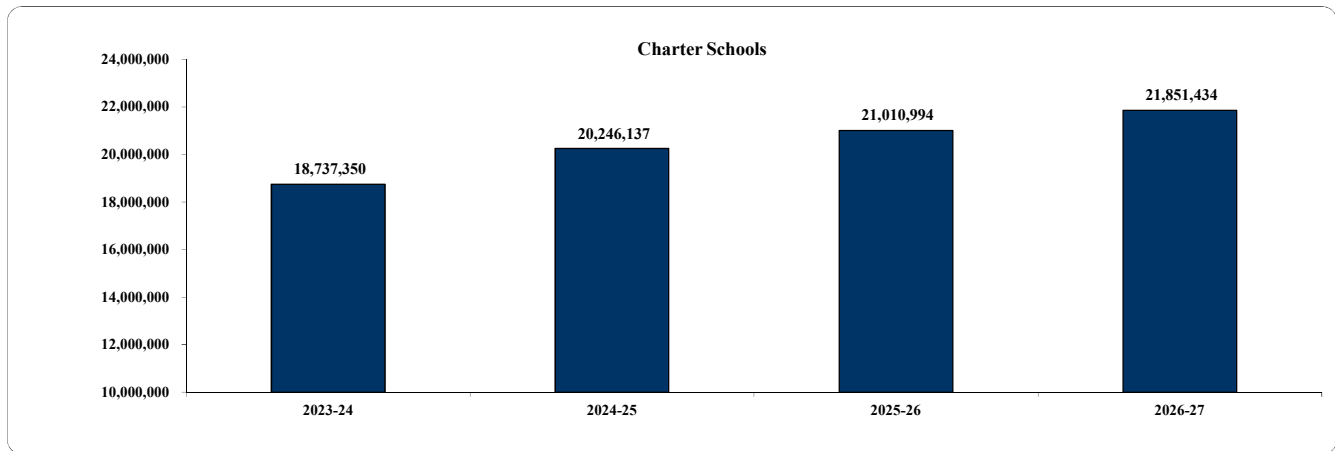
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	445,139	307,768	-	-		
Licensed Temporary	88,288	-	-	-		
Extra Duty Compensation	-	2,615	-	-		
Insurance Opt Out	1,600	4,600	-	-		
SALARIES & WAGES	535,027	314,983	-	-		
PERS	179,129	106,896	-	-		
Social Security	31,846	17,914	-	-		
Medicare	7,448	4,190	-	-		
Workers Compensation	1,364	2,567	-	-		
Unemployment	540	76	-	-		
Oregon Paid Leave	2,140	1,260	-	-		
Health Insurance	90,363	54,404	-	-		
Life Insurance	93	917	-	-		
TSA Exec ER Paid	5,242	4,133	-	-		
Long Term Disability	-	223	-	-		
FSA/HSA	2,400	600	-	-		
TSA Classified ER Paid Health Insurance Option	11	-	-	-		
BENEFITS	320,577	193,179	-	-		
Other Licensed Subs	9,455	24,867	-	-		
Other Classified Subs	-	10,108	-	-		
PURCHASED SERVICES	9,455	34,987	-	-		
Supplies and Materials	936	3,224	-	-		
Textbooks	31,731	-	-	-		
Non-Consumables	1,881	400	-	-		
SUPPLIES	34,548	3,624	-	-		
Dues/Fees/Memberships	1,120	632	-	-		
OTHER OBJECTS	1,120	632	-	-		
ALTERNATIVE EDUCATION	900,727	547,406	-	-		



The K-8 Medford Online Academy (MOA) program was closed in 2024-25. The 4.5 FTE were dispersed to other functions. 3 FTE were moved to the middle schools, 0.22 FTE was moved to District Alternative Programs, 0.78 FTE was moved to the Office of the Principal, and 0.5 FTE was eliminated.

General Fund Detail Budget - 1288 Charter Schools

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Charter School Payments	18,737,350	20,246,137	21,010,994	21,851,434	21,851,434	
PURCHASED SERVICES	18,737,350	20,246,137	21,010,994	21,851,434	21,851,434	
SUPPLIES						
CAPITAL OUTLAY						
OTHER OBJECTS						
CHARTER SCHOOLS	18,737,350	20,246,137	21,010,994	21,851,434	21,851,434	



Function 1288 provides for the pass-through of state school funding per Oregon Revised Statute (ORS) 338.155 and individual agreements with each Charter School. The Madrone Trail Public Charter School, Logos Public Charter School, Kids Unlimited Academy Public Charter School, and The Valley School of Southern Oregon are the four District-sponsored charter schools budgeted. Charter School ADMr is projected at 2,087 for the FY26-27 budget, equal to the prior year. Ongoing charter school contract negotiations could change this assumption.

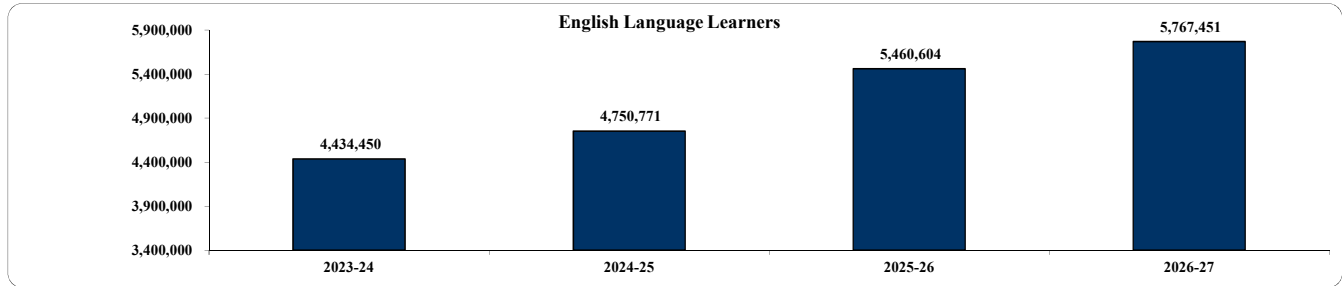
Overall spending is projected to be \$0.84M or 4.0% higher at \$21.8M for FY26-27 based on higher \$/ADMw in the 2025-26 budget.

General Fund Detail Budget - 1291 English Language Learners

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	1,820,344	2,094,960	2,237,207	2,352,903	2,352,903	
Classified	580,853	706,370	979,869	1,036,870	1,036,870	
Administrator Salaries	54,301	21,198	24,205	110,434	110,434	
Licensed Temporary	56,729	7,365	46,611	46,611	46,611	
Classified Temporary	1,716	1,090	2,200	2,200	2,200	
Additional Salary	-	6,000	-	-	-	
Classified Overtime	12,197	16,588	10,448	10,448	10,448	
Extra Duty Compensation	(787)	2,397	-	-	-	
Insurance Opt Out	16,272	28,778	15,900	19,200	19,200	
SALARIES & WAGES	2,541,626	2,884,746	3,316,441	3,578,666	3,578,666	
PERS	781,535	861,897	795,856	877,785	877,785	
Social Security	151,801	173,737	195,096	211,150	211,150	
Medicare	35,502	40,632	45,627	49,382	49,382	
Workers Compensation	7,029	16,466	14,538	15,734	15,734	
Unemployment	2,545	694	15,514	34,056	34,056	
Oregon Paid Leave	10,167	11,544	12,032	13,067	13,067	
Health Insurance	422,211	511,861	560,896	578,069	578,069	
Life Insurance	541	6,850	883	5,800	5,800	
TSA Exec ER Paid	40,146	38,626	38,800	38,800	38,800	
Long Term Disability	5,694	2,780	4,220	4,650	4,650	
FSA/HSA	17,775	14,990	27,400	28,000	28,000	
TSA Classified ER Paid Health Insurance Option	9,875	8,370	5,325	5,325	5,325	
BENEFITS	1,484,821	1,688,449	1,716,188	1,861,819	1,861,819	
Professional Growth	849	249	2,500	11,000	11,000	
Professional Instr. Services	4,599	7,456	7,500	7,500	7,500	
Pupil Transportation	-	-	200	200	200	
Travel - In District	1,625	1,255	2,000	3,000	3,000	
Travel - Out of District	700	3,635	10,000	10,000	10,000	
Tuition	-	-	600	-	-	
Professional Services	63,993	15,690	30,000	45,000	45,000	
Other General Prof/Tech Sv	18,043	-	-	-	-	
Other Licensed Subs	86,549	65,403	85,918	85,918	85,918	
Other Classified Subs	2,163	16,379	258	258	258	
PURCHASED SERVICES	178,521	110,067	138,976	162,876	162,876	
Supplies and Materials	7,197	13,034	11,000	11,000	11,000	
Textbooks	725	(1,513)	1,000	1,000	1,000	
Non-Consumables	723	-	-	-	-	
Software	7,371	10,782	276,000	151,000	151,000	
Hardware Under \$5,000	7,475	8,820	-	-	-	
SUPPLIES	23,491	31,124	288,000	163,000	163,000	
Principal - SBITA	205,746	36,071	-	-	-	
Interest - SBITA	67	-	-	-	-	
Dues/Fees/Memberships	179	315	1,000	1,090	1,090	
OTHER OBJECTS	205,991	36,386	1,000	1,090	1,090	
ENGLISH LANGUAGE LEARNERS	4,434,450	4,750,771	5,460,604	5,767,451	5,767,451	

General Fund Detail Budget - 1291 English Language Learners

1291 English Language Learners Continued



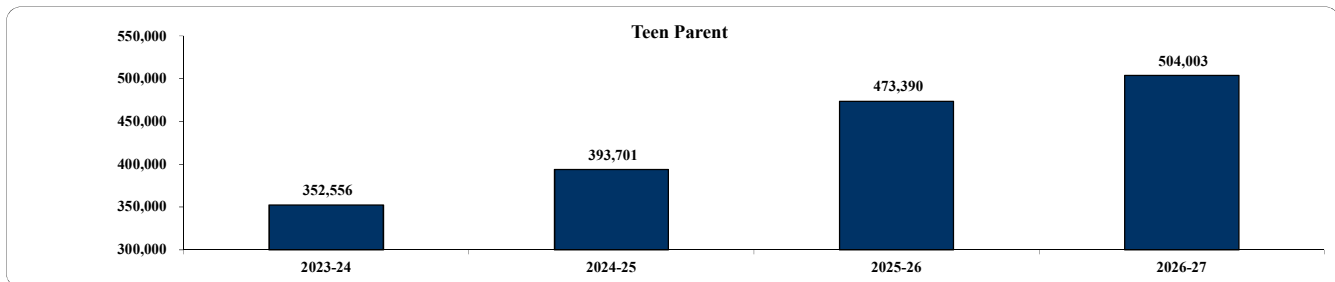
The District's English as a Second Language (ESL) program represents 53.19 FTE across all funds. English for Speakers of Other Languages (ESOL) endorsed teachers (24 FTE) are assigned to all elementary, middle, and high school locations based on the number of students at each location. Staff focus on instructing students, using the English Language Development Curriculum and other supplementary materials, with the goal of English language acquisition for every student. There are 6.0 FTE EL Success Specialists, 2.69 FTE ELD Assistants, 12.5 ELL Educational Assistants, 1.0 ELL Success Specialist, 1.0 FTE TOSA, 1.0 FTE Family and Community Liaison, 1.0 FTE Lead Translator Interpreter, 1.0 FTE Secretary, 1.0 FTE Teaching and Learning Facilitator, 1.0 FTE Translator Interpreter, and 1.0 FTE Two Way Immersion Kindergarten teacher.

The FY26-27 Budget of \$5.7M is \$0.3M higher, or 5.6% primarily driven by wage increases. There is also a 2-year contract for the Flashlight360 renewal (in the software budget).

Year	ELL Count	ELL % of ADMr	1 Year Change	2 Year Change	3 Year Change	4 Year Change	5 Year Change
2025	1177	8.78%	-3.05%	10.38%	8.27%	10.92%	24.8%
2024	1214	8.85%	13.85%	11.67%	14.41%	28.77%	
2023	1066	7.78%	-1.91%	0.49%	13.10%		
2022	1087	7.88%	2.45%	15.31%			
2021	1061	7.51%	12.56%				
2020	943	6.57%					
Year	Dist ADMr Inc. Charter Schools		1 Year Change	2 Year Change	3 Year Change	4 Year Change	5 Year Change
2025	13413		-2.17%	-2.14%	-2.71%	-5.10%	-6.5%
2024	13710		0.03%	-0.56%	-3.00%	-4.42%	
2023	13706		-0.59%	-3.03%	-4.45%		
2022	13787		-2.46%	-3.88%			
2021	14134		-1.46%				
2020	14344		-0.02%				

General Fund Detail Budget - 1292 Teen Parent

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	14,781	15,774	16,001	16,681	16,681	
Classified	196,560	215,113	257,379	272,952	272,952	
Licensed Temporary	9	-	-	-	-	
Classified Temporary	163	-	-	-	-	
Additional Salary	-	1,500	-	-	-	
Classified Overtime	2,480	1,952	4,400	4,400	4,400	
Insurance Opt Out	777	7,942	7,200	7,200	7,200	
SALARIES & WAGES	214,770	242,282	284,980	301,233	301,233	
PERS	50,641	60,084	82,940	87,639	87,639	
Social Security	12,835	14,468	17,318	18,326	18,326	
Medicare	3,002	3,384	4,050	4,286	4,286	
Workers Compensation	679	1,538	1,290	1,366	1,366	
Unemployment	217	58	1,287	2,956	2,956	
Oregon Paid Leave	859	969	1,094	1,159	1,159	
Health Insurance	61,749	55,778	69,698	76,284	76,284	
Life Insurance	65	480	110	110	110	
TSA Exec ER Paid	2,568	7,392	4,800	4,800	4,800	
Long Term Disability	657	281	399	422	422	
FSA/HSA	2,301	102	3,400	3,400	3,400	
TSA Classified ER Paid Health Insurance Option	1,803	4,374	-	-	-	
BENEFITS	137,376	148,910	186,387	200,747	200,747	
Travel - In District	-	177	-	-	-	
Other Classified Subs	-	2,099	1,545	1,545	1,545	
PURCHASED SERVICES	-	2,276	1,545	1,545	1,545	
Supplies and Materials	409	233	478	478	478	
SUPPLIES	409	233	478	478	478	
TEEN PARENT	352,556	393,701	473,390	504,003	504,003	

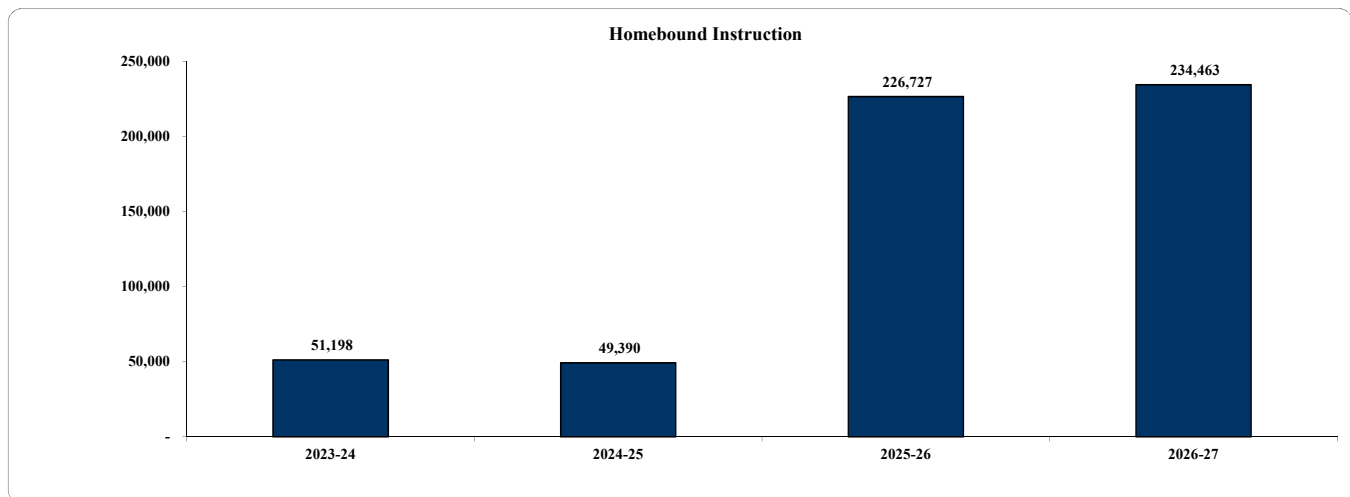


The Pregnant and Parenting Teen (PPT) program is located at the North Medford High Early Learning Center (ELC), formerly called the Child Development Center (CDC). Enrollment in the program is not mandatory for pregnant and parenting teens and there is no waiting list. The PPT program serves students from school districts across Southern Oregon and helps achieve multiple objectives including: 1) helping pregnant students graduate from high school or obtain a GED; 2) helping students pursue a high school pathway and take college articulated coursework; 3) providing childcare services both for students with children and the community at large; 4) teaching healthy lifestyles and parenting skills; and 5) educating high school students on child development. They serve an average of 10 teen parents, 14 preschool aged children, and 18 pre-education students.

The ELC is a vital piece for our NMHS Pre-Education Pathway and education courses. The program is articulated with Rogue Community College's Early Learning and Elementary Education Program. Any student has the opportunity to take numerous levels of education courses, along with some field experiences courses in our ELC. Students who complete the program are eligible for 13 college credits which awards them a basic certificate in Early Childhood Education upon graduation. There are Federal block grants, and the State Department of Human Services support payments and local Preschool user fees to help fund the PPT program.

General Fund Detail Budget - 1295 Homebound Instruction

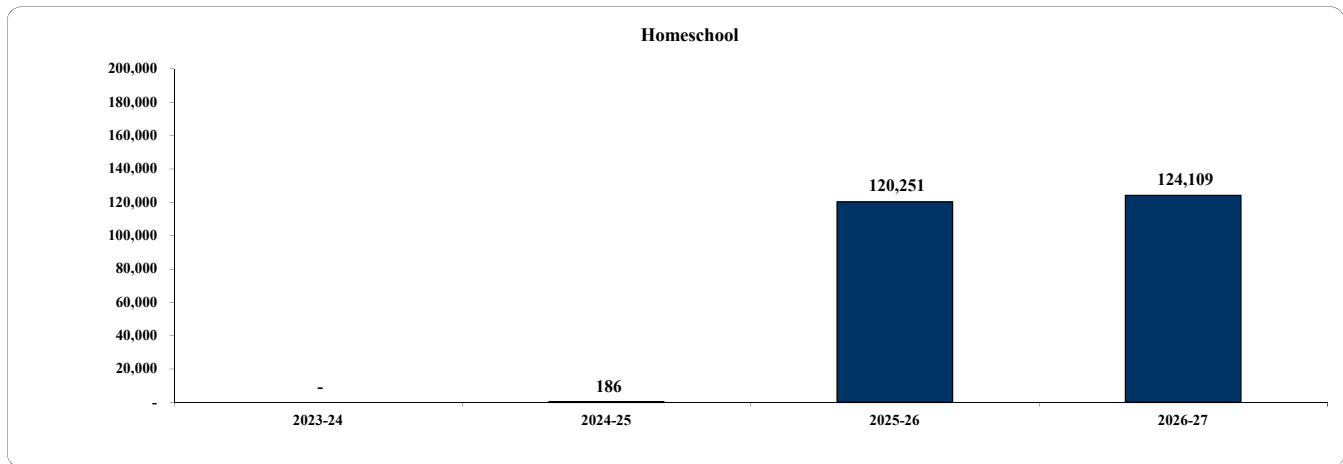
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Classified Overtime	3,812	-	-	-	-	-
Home Instruction	35,478	37,032	160,611	157,861	157,861	157,861
SALARIES & WAGES	39,308	37,032	160,611	157,861	157,861	157,861
PERS	7,837	7,756	45,667	56,303	56,303	56,303
Social Security	2,428	2,320	9,958	9,787	9,787	9,787
Medicare	568	543	2,329	2,289	2,289	2,289
Workers Compensation	135	184	742	729	729	729
Unemployment	39	9	255	1,579	1,579	1,579
Oregon Paid Leave	157	150	642	631	631	631
Health Insurance	-	327	-	-	-	-
Life Insurance	-	41	28	28	28	28
TSA - ER Paid	-	49	3,200	-	-	-
Long Term Disability	23	6	296	56	56	56
FSA/HSA	-	-	600	2,800	2,800	2,800
TSA Classified ER Paid Health Insurance Option	47	-	1,200	1,200	1,200	1,200
BENEFITS	11,235	11,386	64,916	75,402	75,402	75,402
Travel - In District	655	130	900	900	900	900
Other Licensed Subs	-	671	-	-	-	-
PURCHASED SERVICES	655	800	900	900	900	900
Supplies and Materials	-	63	300	300	300	300
Non-Consumables	-	108	-	-	-	-
SUPPLIES	-	171	300	300	300	300
HOMEBOUND INSTRUCTION	51,198	49,390	226,727	234,463	234,463	234,463



Homebound teachers are assigned on an as-needed basis to students who, for one reason or another, cannot attend school. Students who typically require homebound instruction include students with medical conditions that cannot be accommodated at school, teen parents, students with behavior issues that cause them to be a danger to themselves or others, students who are awaiting alternative placement, and expelled students who may need this option. Spending in FY26-27 is roughly flat from the prior year. There is no FTE designated to this function. Temporary labor is used on an as needed basis by licensed staff for students who currently need homebound instruction, which fluctuates throughout the year.

General Fund Detail Budget - 1296 Homeschool

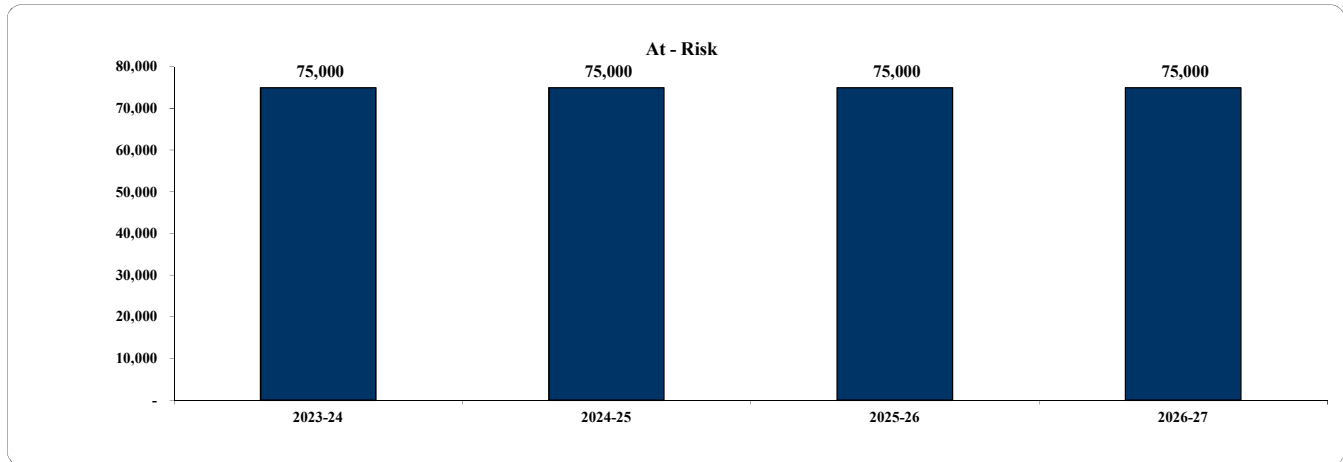
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	-	-	63,008	65,686	65,686	
SALARIES & WAGES	-	-	63,008	65,686	65,686	
PERS	-	-	21,927	22,853	22,853	
Social Security	-	-	3,907	4,073	4,073	
Medicare	-	-	914	952	952	
Workers Compensation	-	-	291	303	303	
Unemployment	-	-	630	657	657	
Oregon Paid Leave	-	-	252	263	263	
Health Insurance	-	-	23,709	23,709	23,709	
Life Insurance	-	-	14	14	14	
TSA Exec ER Paid	-	-	600	600	600	
BENEFITS	-	-	52,243	53,423	53,423	
Supplies and Materials	-	155	5,000	5,000	5,000	
SUPPLIES		155	5,000	5,000	5,000	
Dues/Fees/Memberships	-	31	-	-	-	
OTHER OBJECTS		31				
HOMESCHOOL	-	186	120,251	124,109	124,109	



A new program of choice, Homeschool Connection was launched in the 25-26 school year. This program aims to partner with families and offer a hybrid model that supports at home distance learning with a parent while providing families access to resources, materials and personnel from the school. A Learning Coach will be assigned to the family. There is 1.0 FTE for this function, but FTE could increase if increased enrollment warrants.

General Fund Detail Budget - 1297 At-Risk

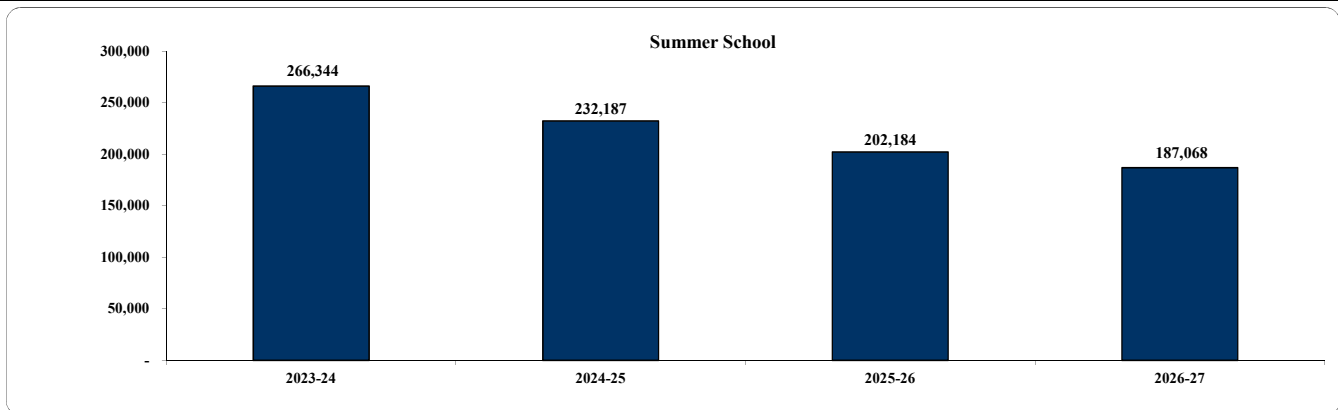
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Long Term Disability	-	-	-			
BENEFITS	-	-	-			
Professional Services	75,000	75,000	75,000	75,000	75,000	
PURCHASED SERVICES	75,000	75,000	75,000	75,000	75,000	-
AT-RISK	75,000	75,000	75,000	75,000	75,000	-



Function 1297 provides instructional activities designed to assist students with risk factors that affect the learning process. This function includes Professional Services for the Maslow Project, which provides food, services, and clothing to an increasing number of students who experience homelessness in the community. \$75K has been designated for the Maslow Project services out of this department. Maslow also receives Measure 98 and Title grant funds. FY26-27 spending is flat to the prior year.

General Fund Detail Budget - 1430 Summer School

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed Temporary	155,129	113,981	101,800	101,800	101,800	
Classified Temporary	24,811	27,844	-	10,000	10,000	
Classified Overtime	346	438	-	-	-	
Insurance Opt Out	-	300	-	-	-	
SALARIES & WAGES	180,632	142,563	101,800	111,800	111,800	
PERS	53,072	43,777	35,152	36,578	36,578	
Social Security	11,199	8,838	6,312	7,614	7,614	
Medicare	2,619	2,067	1,476	1,781	1,781	
Workers Compensation	547	1,024	470	567	567	
Unemployment	977	34	475	1,228	1,228	
Oregon Paid Leave	723	570	-	-	-	
BENEFITS	69,137	56,310	43,884	47,768	47,768	
Professional Instr. Services	-	290	-	-	-	
Pupil Transportation OTHTS	-	-	22,500	-	-	
Travel - In District	22	-	1,000	-	-	
Other Licensed Subs	3,999	10,681	-	10,000	10,000	
Other Classified Subs	-	1,370	-	1,000	1,000	
PURCHASED SERVICES	4,021	12,341	23,500	11,000	11,000	
Supplies and Materials	12,278	20,358	33,000	16,500	16,500	
Student Rewards	-	615	-	-	-	
SUPPLIES	12,278	20,973	33,000	16,500	16,500	
Dues/Fees/Memberships	276	-	-	-	-	
OTHER OBJECTS	276	-	-	-	-	
SUMMER SCHOOL	266,344	232,187	202,184	187,068	187,068	

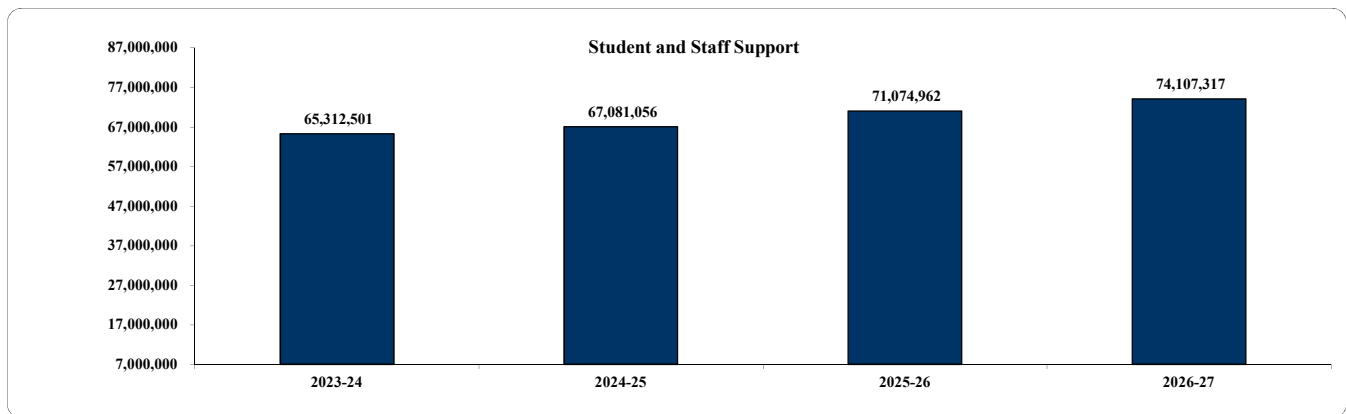


The budget for the Summer Programs for FY26-27 is \$0.18M in the General Fund. There will also be a state summer school special revenue grant this year (included as part of page 109). The Summer Programs provide critical additional support for students who are credit deficient, in need of additional support, or to complete graduation requirements. Students will continue to have access to credit recovery options and targeted interventions based on each student's specific needs. Students can use this option to graduate on time with their class cohort. The summer program also includes Panther and Tornado Camp which is a two week period for incoming freshman students in need of academic confidence and support as they transition to high school. We also have week long bridge programs for 5th graders moving to middle school to support their transition from elementary to middle school. Additionally, we offer a Kindergarten Jumpstart program, aimed at preparing our earliest learners for kindergarten. They focus on routines and procedures, literacy, and building confidence for their first experience in school. This program is very well attended each year.

There are no full time FTE dedicated to this function, instead is staffed with existing employees who choose to work during the summer. There will be administrative presence during the Summer Programs at all sites as well as classified support staff. During the summer sessions, schools will be open for four to five hours each day.

General Fund Expenditures - Student and Staff Support Functions

DIRECT	2023-24	2024-25	2025-26	2026-27	2026-27	2026-27
INSTRUCTION SUPPORT	Actual	Actual	Amended	Proposed	Approved	Adopted
Attendance	335,800	198,986	225,850	232,612	232,612	
School Resource Officers	592,923	627,243	979,455	1,008,551	1,008,551	
Office of the Dean	469,481	469,000	494,493	517,439	517,439	
Counseling	1,743,183	1,614,616	1,964,788	2,074,778	2,074,778	
Nursing	1,262,252	1,356,998	1,450,236	1,526,346	1,526,346	
Psychological Services	1,482,847	1,328,491	1,205,559	1,269,529	1,269,529	
Speech & Audiology	3,287,911	3,566,657	4,311,470	4,587,694	4,587,694	
Occupational Therapy	3,052	355,965	367,563	379,359	379,359	
General Student Support	817,273	904,052	1,119,128	1,221,006	1,221,006	
Student Wellness	262,356	320,473	399,089	372,592	372,592	
DIRECT INSTRUCTION SUPPORT	10,257,079	10,742,481	12,517,632	13,189,905	13,189,905	
DIRECT	2023-24	2024-25	2025-26	2026-27	2026-27	2026-27
STAFF SUPPORT	Actual	Actual	Amended	Proposed	Approved	Adopted
Improvement of Instruction - Media	177,579	180,002	143,991	148,771	148,771	
Instructional Development	86,822	76,217	65,000	72,000	72,000	
Curriculum Development	463,016	57,906	183,798	211,992	211,992	
Instructional Media Services	90,424	50,538	65,200	70,200	70,200	
School Libraries	1,926,883	1,596,348	1,774,865	1,783,748	1,783,748	
Audiovisual Services	2,746	1,096	6,375	6,510	6,510	
Instructional Staff Development	564,950	811,395	623,352	526,487	526,487	
DIRECT STAFF SUPPORT	3,312,420	2,773,502	2,862,580	2,819,708	2,819,708	
TOTAL DIRECT INSTRUCTION SUPPORT	13,569,499	13,515,983	15,380,212	16,009,613	16,009,613	
TOTAL GENERAL SUPPORT	51,743,002	53,565,073	55,694,750	58,097,704	58,097,704	
TOTAL SUPPORT SERVICES	65,312,501	67,081,056	71,074,962	74,107,317	74,107,317	

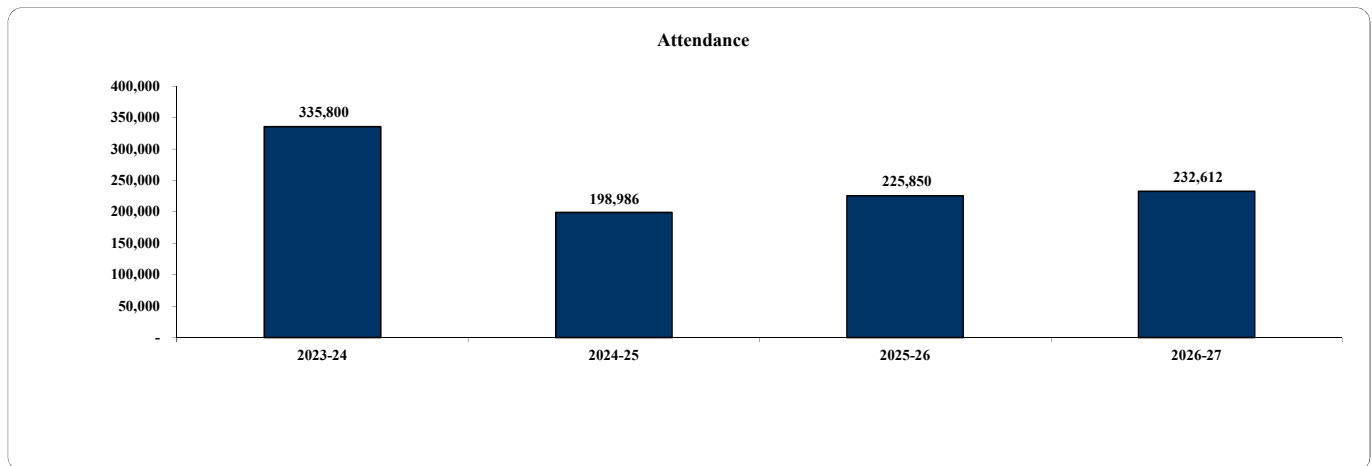


Spending for the Student and Staff Support functions are budgeted at \$74.1M for the FY26-27 Budget, up \$3.1M (4.6%) from the FY25-26 Budget. Across all funding sources the FY26-27 Budget is 114.3 FTE, which is 1 FTE less than the prior year due to a decrease in function 2213, Curriculum Development.

Spending variances compared to the prior year's Budget for each function are described in the following pages.

General Fund Detail Budget - 2112 Attendance

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Classified	172,364	88,476	106,970	116,176	116,176	
Classified Temporary	3,868	-	14,049	14,049	14,049	
Classified Overtime	2,323	260	500	500	500	
Insurance Opt Out	5,481	100	2,400	2,400	2,400	
SALARIES & WAGES	184,036	88,836	123,919	133,125	133,125	
PERS	44,245	12,392	22,323	33,163	33,163	
Social Security	11,296	5,445	7,534	8,105	8,105	
Medicare	2,642	1,274	1,762	1,896	1,896	
Workers Compensation	607	609	561	604	604	
Unemployment	185	21	567	1,307	1,307	
Oregon Paid Leave	736	355	428	465	465	
Health Insurance	43,565	38,920	56,738	45,151	45,151	
Life Insurance	65	229	41	41	41	
TSA Exec ER Paid	4,000	3,800	4,200	1,800	1,800	
Long Term Disability	147	111	76	256	256	
FSA/HSA	600	2,200	2,200	2,100	2,100	
TSA Classified ER Paid Health Insurance Option	723	690	1,500	600	600	
BENEFITS	108,811	66,046	97,930	95,487	95,487	
Travel - In District	4,796	2,004	3,600	3,600	3,600	
Professional Services	-	4,000	-	-	-	
PURCHASED SERVICES	4,796	6,004	3,600	3,600	3,600	
Supplies and Materials	58	-	400	400	400	
Principal - SBITA	36,367	37,224	-	-	-	
Interest - SBITA	1,733	876	-	-	-	
OTHER OBJECTS	38,158	38,100	400	400	400	
ATTENDANCE	335,800	198,986	225,850	232,612	232,612	

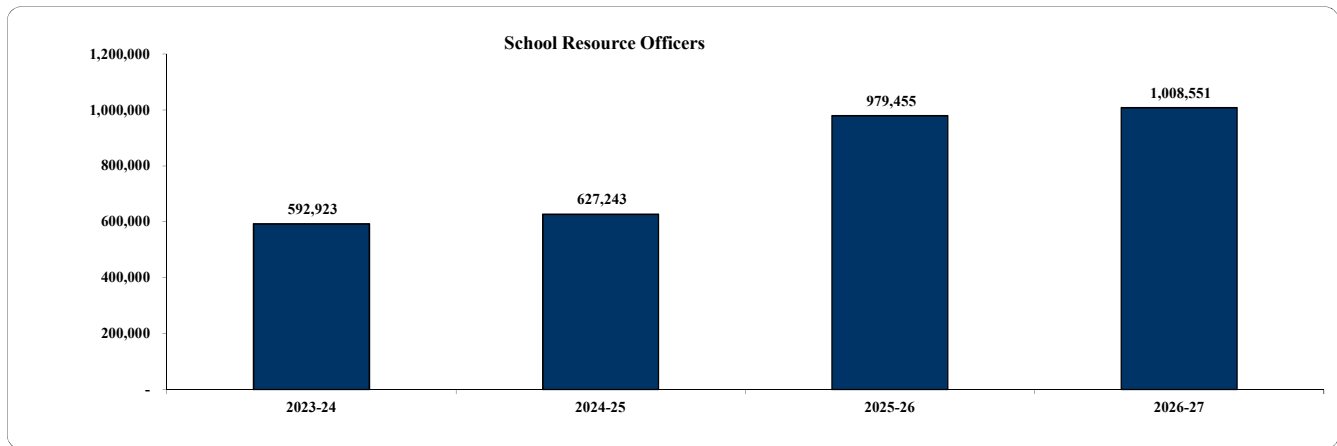


Attendance Specialists make visits to students' homes and work with students and families to improve attendance using a variety of strategies.

Spending in this function is roughly flat to the prior year. This function has total staffing of 3.0 FTE in FY26-27, which is flat to the prior year.

General Fund Detail Budget - 2115 School Resource Officers

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Administrator Salaries			161,098	167,945	167,945	
SALARIES & WAGES			161,098	167,945	167,945	
PERS Tiers I & II			46,304	48,257	48,257	
Social Security			9,988	10,413	10,413	
Medicare			2,336	2,435	2,435	
Workers Compensation			744	776	776	
Unemployment			1,611	1,679	1,679	
Oregon Paid Leave			-	672	672	
Health Insurance			16,160	16,160	16,160	
Life Insurance			14	14	14	
TSA - ER Paid			1,200	1,200	1,200	
BENEFITS			78,357	81,606	81,606	
Professional Services	592,923	627,243	740,000	759,000	759,000	
PURCHASED SERVICES	592,923	627,243	740,000	759,000	759,000	
SCHOOL RESOURCE OFFICERS	592,923	627,243	979,455	1,008,551	1,008,551	



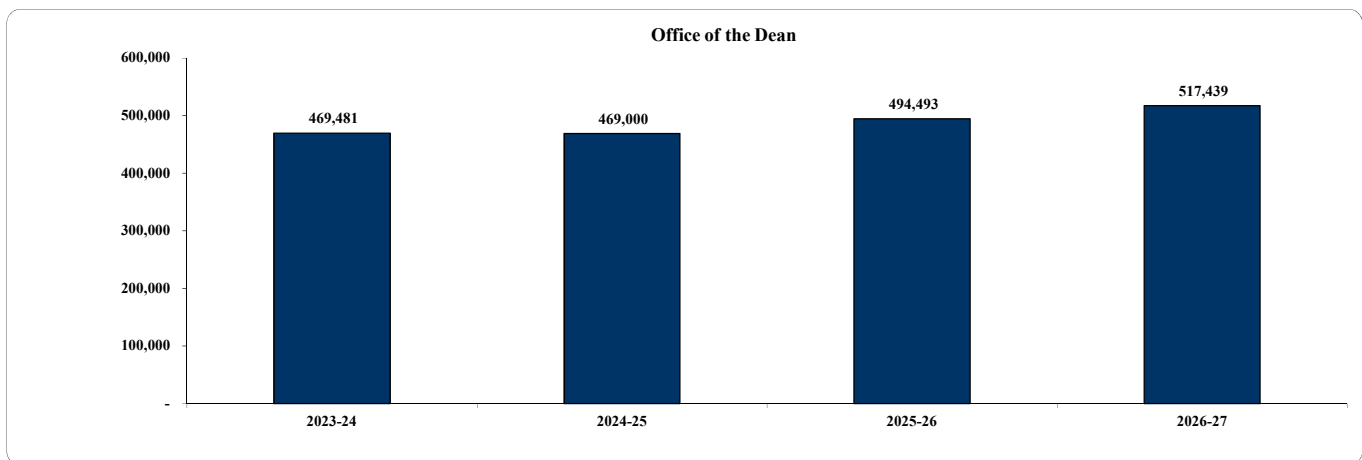
Function 2115 provides law enforcement support for enhancing student safety in partnership with the Medford Police Department (MPD) for School Resource Officers (SROs) and School Marshals.

Safety and security are shared values in our district and always a top priority. This function has a total of 1.0 FTE.

Our SROs are based out of our high schools and middle schools. They also have coverage responsibilities in our elementary schools as well. Our Marshals are dedicated to elementary school security and work closely with the SROs. The District and MPD work closely with the Jacksonville Police Department, Jackson County Sheriff's Office, and the Oregon State Police to serve the schools located outside of the Medford Police Department's service area. Each of the local emergency service agencies noted above, as well as the local fire departments, work together with the District's Security Department for all types of emergency preparedness and response. Of the \$759K, \$434K is for SRO's at secondary schools and \$325K is for Marshal's at elementary schools.

General Fund Detail Budget - 2121 Office of the Dean

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	285,745	288,119	285,940	294,409	294,409	
Extra Duty Compensation	16,424	14,478	30,002	30,737	30,737	
Insurance Opt Out	2,400	7,400	4,800	2,400	2,400	
SALARIES & WAGES	304,568	309,997	320,851	327,655	327,655	
PERS	99,158	100,428	102,233	112,490	112,490	
Social Security	18,295	18,721	19,595	20,166	20,166	
Medicare	4,279	4,378	4,583	4,716	4,716	
Workers Compensation	786	1,509	1,460	1,503	1,503	
Unemployment	305	75	1,474	3,253	3,253	
Oregon Paid Leave	1,218	1,240	1,218	1,255	1,255	
Health Insurance	33,571	27,077	37,512	43,299	43,299	
Life Insurance	41	601	41	41	41	
TSA Exec ER Paid	3,183	2,668	3,225	1,800	1,800	
Long Term Disability	941	364	455	661	661	
FSA/HSA	1,200	600	1,200	600	600	
TSA Classified ER Paid Health Insurance Option	-	-	645	-	-	
BENEFITS	162,978	157,661	173,642	189,784	189,784	
Other Licensed Subs	1,935	1,342	-	-	-	
PURCHASED SERVICES	1,935	1,343	-	-	-	
OFFICE OF THE DEAN	469,481	469,000	494,493	517,439	517,439	

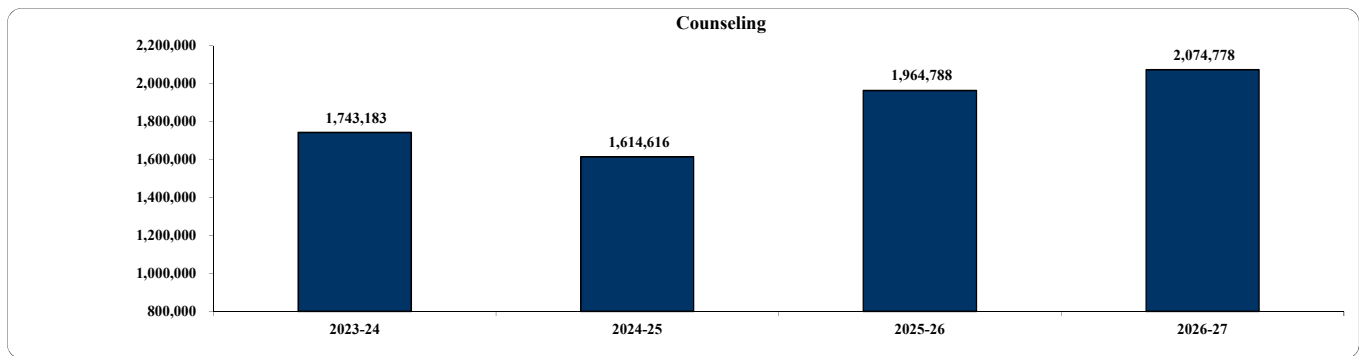


The budget for Office of the Dean is \$0.5M. The total FTE in this function is 3.0 with one dean at each middle school.

During the critical developmental stages in middle school, highly qualified student deans are utilized to maintain a safe and orderly educational environment. Deans (one per middle school) are involved in master scheduling and managing student schedules, student behavior support, and provide communication links to the home. They also provide much needed supervision during school and after-hours at school events.

General Fund Detail Budget - 2122 Counseling

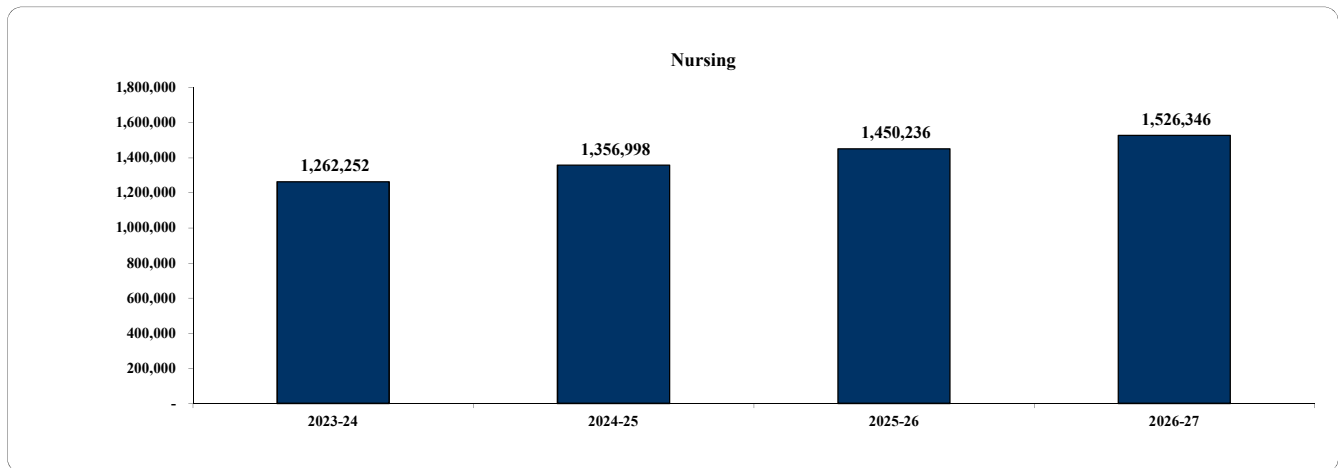
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	976,954	947,777	1,147,091	1,210,162	1,210,162	
Classified	32,497	26,706	38,421	41,014	41,014	
Licensed Temporary	1,912	3,018	-	-	-	
Classified Temporary	-	28	-	-	-	
Classified Overtime	1,331	223	11	11	11	
Extra Duty Compensation	36,786	-	25,300	25,300	25,300	
Insurance Opt Out	4,280	18,400	12,000	12,000	12,000	
SALARIES & WAGES	1,053,760	996,152	1,222,823	1,288,488	1,288,488	
PERS	340,725	322,139	400,144	423,113	423,113	
Social Security	63,046	59,914	75,071	79,142	79,142	
Medicare	14,745	14,012	17,557	18,509	18,509	
Workers Compensation	2,848	5,132	5,594	5,897	5,897	
Unemployment	1,074	240	6,487	12,765	12,765	
Oregon Paid Leave	4,215	3,988	4,742	5,005	5,005	
Health Insurance	224,310	156,641	179,455	188,792	188,792	
Life Insurance	201	2,280	221	221	221	
TSA Exec ER Paid	11,433	10,456	17,600	17,600	17,600	
Long Term Disability	2,054	515	1,863	1,963	1,963	
FSA/HSA	9,273	3,600	6,200	6,200	6,200	
TSA Classified ER Paid Health Insurance Option	16	-	16,280	16,280	16,280	
BENEFITS	673,940	578,916	731,213	775,487	775,487	
Professional Growth	4,432	6,759	-	-	-	
Professional Instr. Services	-	-	400	-	-	
Travel - Out of District	2,755	4,525	6,773	6,773	6,773	
Professional Services	576	-	-	-	-	
Other Licensed Subs	7,331	24,149	-	-	-	
Other Classified Subs	-	1,893	-	-	-	
PURCHASED SERVICES	15,093	37,326	7,173	6,773	6,773	
Supplies and Materials	176	1,973	3,579	4,030	4,030	
Non-Consumables	85	-	-	-	-	
SUPPLIES	261	1,973	3,579	4,030	4,030	
Dues/Fees/Memberships	129	250	-	-	-	
OTHER OBJECTS	129	250	-	-	-	
COUNSELING	1,743,183	1,614,616	1,964,788	2,074,778	2,074,778	



Function 2122 includes staff, services, and materials used for student academic guidance counseling in the Student Services Centers in the middle and high schools.

General Fund Detail Budget - 2134 Nursing

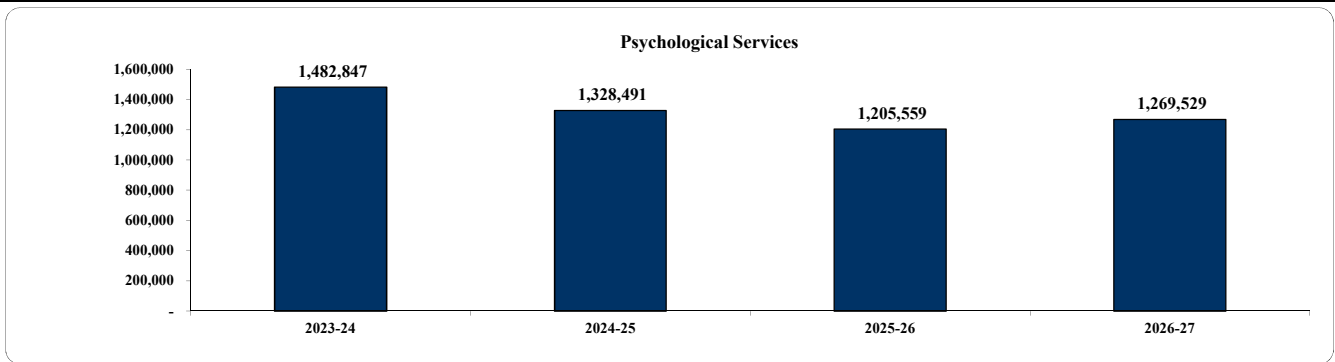
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	701,092	778,187	829,270	855,788	855,788	
Classified	74,357	46,781	49,913	53,419	53,419	
Classified Overtime	1,717	288	-	-	-	
Extra Duty Compensation	-	10,992	-	11,320	11,320	
Insurance Opt Out	2,400	4,600	2,134	-	-	
SALARIES & WAGES	779,566	840,911	881,317	920,526	920,526	
PERS	242,446	271,371	296,830	322,462	322,462	
Social Security	47,072	51,010	54,509	57,073	57,073	
Medicare	11,009	11,930	12,748	13,348	13,348	
Workers Compensation	2,034	4,097	4,062	4,253	4,253	
Unemployment	779	203	4,101	9,205	9,205	
Oregon Paid Leave	3,118	3,380	3,517	3,682	3,682	
Health Insurance	138,904	143,154	136,810	144,432	144,432	
Life Insurance	117	1,998	276	269	269	
TSA Exec ER Paid	8,141	8,440	14,056	12,000	12,000	
Long Term Disability	1,366	686	1,517	1,634	1,634	
FSA/HSA	4,000	5,600	11,800	9,400	9,400	
TSA Classified ER Paid Health Insurance Option	1,768	600	5,427	5,796	5,796	
BENEFITS	460,754	502,469	545,653	583,554	583,554	
Professional Growth	-	538	-	-	-	
Professional Instr. Services	38	-	3,000	3,000	3,000	
Travel - In District	4,271	4,737	6,000	5,000	5,000	
Travel - Out of District	1,996	1,690	-	-	-	
PURCHASED SERVICES	6,305	6,965	9,000	8,000	8,000	
Supplies and Materials	15,000	5,816	13,366	13,266	13,266	
Non-Consumables	69	-	-	100	100	
SUPPLIES	15,069	5,816	13,366	13,366	13,366	
Dues/Fees/Memberships	558	837	900	900	900	
OTHER OBJECTS	558	837	900	900	900	
NURSING	1,262,252	1,356,998	1,450,236	1,526,346	1,526,346	



Function 2134 has spending of \$1.5M, (5.25%) higher than the FY25-26 Budget due to COLA increases. This function is for nursing activities, which are noninstructional, such as health assessments, diabetic care, and treatment of minor injuries. There are 8.83 FTE in this function, which is flat to the prior year.

General Fund Detail Budget - 2140 Psychological Services

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	750,203	735,527	669,292	711,966	711,966	
Classified	-	48,117	-	-	-	
Licensed Temporary	832	-	636	636	636	
Classified Temporary	-	-	1,000	1,000	1,000	
Extra Duty Compensation	10,113	11,064	15,925	15,925	15,925	
Insurance Opt Out	4,800	13,600	2,400	2,400	2,400	
SALARIES & WAGES	765,948	808,308	689,253	731,927	731,927	-
PERS	255,339	248,229	282,182	297,205	297,205	
Social Security	46,320	49,034	46,925	49,571	49,571	
Medicare	10,833	11,468	10,974	11,593	11,593	
Workers Compensation	2,000	5,070	3,497	3,694	3,694	
Unemployment	769	195	2,895	7,995	7,995	
Oregon Paid Leave	3,064	3,249	2,997	3,167	3,167	
Health Insurance	119,715	117,052	114,358	111,928	111,928	
Life Insurance	124	1,893	656	324	324	
TSA Exec ER Paid	8,453	7,607	14,400	14,400	14,400	
Long Term Disability	3,918	1,353	848	900	900	
FSA/HSA	2,400	600	23,800	23,800	23,800	
TSA Classified ER Paid Health Insurance Option	-	-	7,400	7,400	7,400	
BENEFITS	452,934	445,751	510,931	531,977	531,977	
Professional Growth	2,042	-	750	800	800	
Travel - In District	323	4	350	350	350	
Travel - Out of District	145	7,885	3,000	3,000	3,000	
Professional Services	259,072	65,048	-	-	-	
PURCHASED SERVICES	261,582	72,937	4,100	4,150	4,150	
Supplies and Materials	2,243	1,268	1,000	1,200	1,200	
SUPPLIES	2,243	1,047	1,000	1,200	1,200	
Dues/Fees/Memberships	140	449	275	275	275	
OTHER OBJECTS	140	449	275	275	275	
PSYCHOLOGICAL SERVICES	1,482,847	1,328,491	1,205,559	1,269,529	1,269,529	

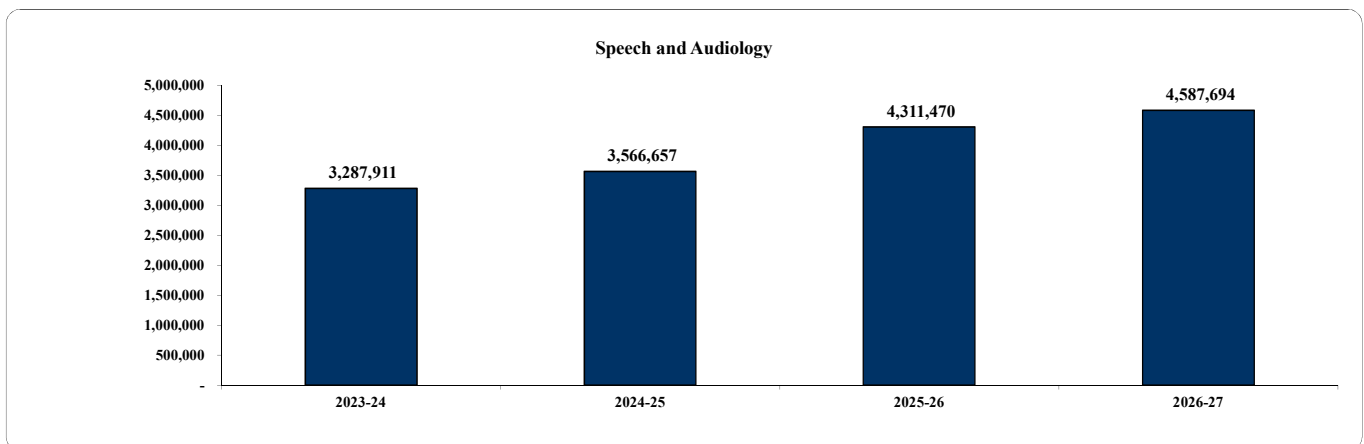


Function 2140 includes evaluation of students to identify a disability and the need for Special Education across the District. Responsibilities include activities related to testing, interpreting results, and consulting with school teams to provide interventions and strategies. This function also includes staff, services, travel, and supplies. Family Solutions (Professional Services) has been moved to Student Wellness (2191).

For 2026-27 spending is \$1.27 M up \$0.06 M or 5.3%. Across all funds, there are 8.0 FTE, which remains flat to the prior year.

General Fund Detail Budget - 2150 Speech and Audiology

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	527,597	773,413	1,034,669	1,096,672	1,096,672	
Classified	437,759	367,911	540,525	569,691	569,691	
Licensed Temporary	5,170	5,834	472	472	472	
Additional Salary	-	1,500	-	-	-	
Classified Overtime	1,963	1,145	-	-	-	
Extra Duty Compensation	4,493	18,068	19,584	19,584	19,584	
Insurance Opt Out	4,326	9,000	7,200	7,200	7,200	
SALARIES & WAGES	981,309	1,176,872	1,602,450	1,693,620	1,693,620	
PERS	296,641	340,947	451,470	481,407	481,407	
Social Security	58,441	70,617	86,116	91,768	91,768	
Medicare	13,668	16,515	22,479	23,801	23,801	
Workers Compensation	3,082	5,825	7,162	7,583	7,583	
Unemployment	1,013	285	8,513	16,414	16,414	
Oregon Paid Leave	3,925	4,736	6,185	6,550	6,550	
Health Insurance	239,322	270,479	328,699	319,801	319,801	
Life Insurance	209	2,666	607	400	400	
TSA Exec ER Paid	14,774	14,027	22,400	22,400	22,400	
Long Term Disability	2,746	1,262	1,910	2,021	2,021	
FSA/HSA	9,000	7,800	17,200	17,200	17,200	
TSA Classified ER Paid Health Insurance Option	6,055	4,571	3,030	3,030	3,030	
BENEFITS	648,876	739,728	955,770	992,375	992,375	
Professional Growth	-	595	-	-	-	
Professional Instr. Services	1,650,721	1,649,272	1,750,000	1,900,000	1,900,000	
Travel - In District	106	9	50	1,500	1,500	
Travel - Out of District	-	-	3,000	-	-	
Other Classified Subs	116	-	-	-	-	
PURCHASED SERVICES	1,650,943	1,649,877	1,753,050	1,901,500	1,901,500	
Supplies and Materials	2,580	-	-	-	-	
Software	4,203	180	200	200	200	
SUPPLIES	6,782	180	200	200	200	
SPEECH AND AUDIOLOGY	3,287,911	3,566,657	4,311,470	4,587,694	4,587,694	

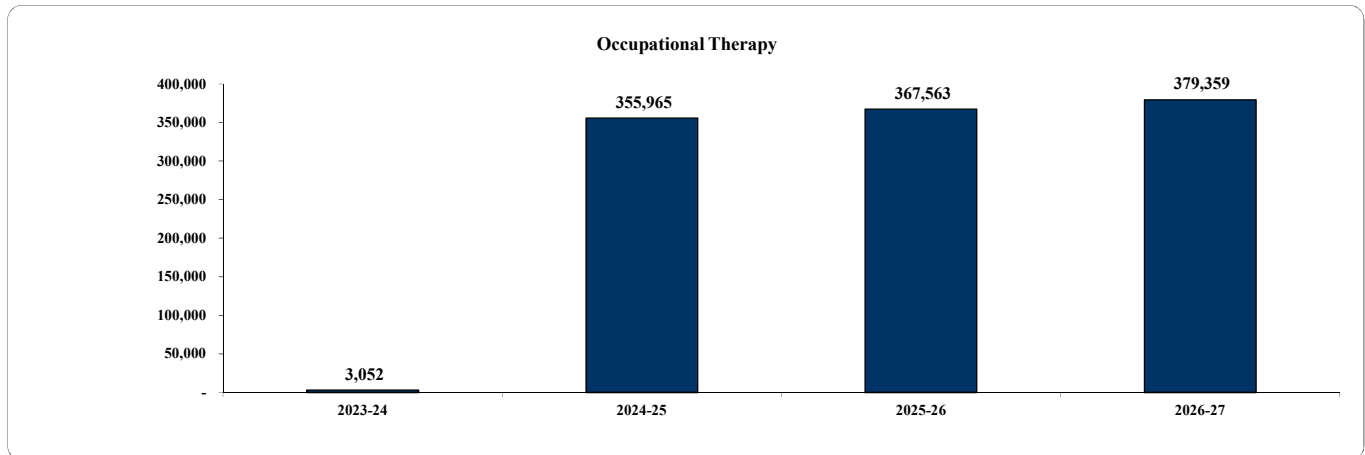


Function 2150 provides support services to Special Education students across the District, including the identification, assessment, and treatment of students with speech, hearing, and language impairments. There are currently 1,406 students who receive speech-language services. The District contracts with Presence Learning for online speech and language services. This amount is highly variable and dependent on the number of available Speech Language Pathologists (SLP's) for hire. If MSD hires more SLP's, then this number with Presence Learning will decrease.

The FY26-27 Budget of \$4.5M is \$0.27M or 6.4% higher than the FY25-26 Budget. This fluctuates based on the ability to recruit qualified staff. There is an \$0.15 M increase in Professional Services to serve the projected need as well as cover a new contract with the Stepping Stones program. Staffing for FY26-27 is equal to last year at 22.2 FTE across all funds.

General Fund Detail Budget - 2160 Occupational Therapy/Autism Spectrum

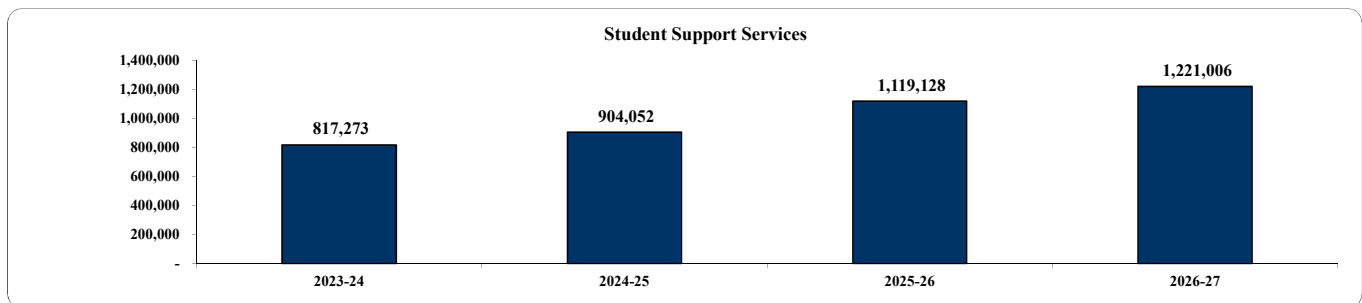
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	-	211,196	216,766	224,409	224,409	
Classified	78	-	-	-	-	
Classified Overtime	12	777	-	-	-	
Extra Duty Compensation	-	2,748	2,748	2,830	2,830	
SALARIES & WAGES	89	214,721	219,514	227,239	227,239	
PERS	23	70,273	74,804	80,031	80,031	
Social Security	6	12,847	13,610	14,089	14,089	
Medicare	1	3,004	3,183	3,295	3,295	
Workers Compensation	0	1,509	1,014	1,050	1,050	
Unemployment	0	52	1,024	2,272	2,272	
Oregon Paid Leave	0	866	878	909	909	
Health Insurance	-	49,397	42,536	40,899	40,899	
Life Insurance	-	538	55	28	28	
TSA Exec ER Paid	-	2,400	1,500	1,200	1,200	
Long Term Disability	-	-	196	497	497	
FSA/HSA	-	-	6,400	6,800	6,800	
TSA Classified ER Paid Health Insurance Option	-	-	1,800	-	-	
BENEFITS	31	140,887	146,999	151,070	151,070	
Professional Growth	747	357	400	400	400	
Travel - In District	192	-	150	150	150	
Other Classified Subs	1,802	-	-	-	-	
PURCHASED SERVICES	2,741	357	550	550	550	
Supplies and Materials	191	-	500	500	500	
SUPPLIES	191	-	500	500	500	
OCCUPATIONAL THERAPY/AUTISM	3,052	355,965	367,563	379,359	379,359	



There are currently 190 students receiving occupational therapy services. Occupational Therapy is a related service for students who are eligible for Special Education. The focus of support is fine motor, sensory, self regulation and executive functioning skills. Across all funds the FTE is 5.0.

General Fund Detail Budget - 2190 Student Support Services

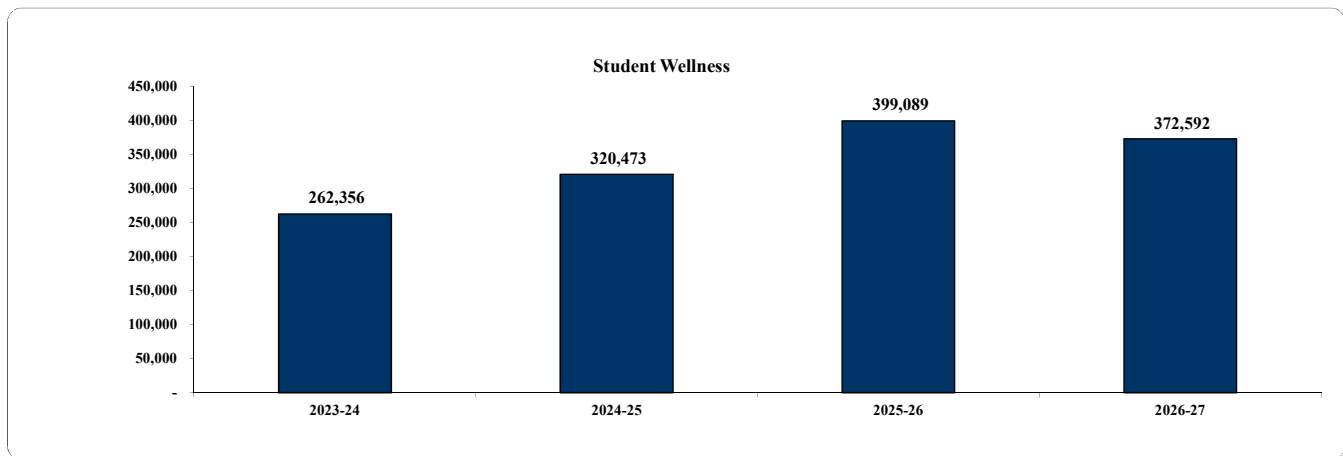
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	-	(2,927)	-	200,000	200,000	
Classified	27,209	55,776	40,171	78,366	78,366	
Administrators Salaries	449,330	510,296	628,363	434,526	434,526	
Licensed Temporary	-	-	36	36	36	
Classified Temporary	4,281	-	1,587	1,587	1,587	
Classified Overtime	78	843	-	-	-	
Extra Duty Compensation	-	-	521	521	521	
Insurance Opt Out	-	4,000	4,800	4,800	4,800	
SALARIES & WAGES	480,898	567,988	675,479	719,837	719,837	
PERS	126,220	155,526	197,023	195,514	195,514	
Social Security	29,136	34,665	46,852	46,502	46,502	
Medicare	6,814	8,107	10,957	10,876	10,876	
Workers Compensation	1,560	3,296	3,491	3,465	3,465	
Unemployment	524	137	4,911	7,500	7,500	
Oregon Paid Leave	1,916	2,283	3,014	2,992	2,992	
Health Insurance	55,977	62,119	67,506	66,198	66,198	
Life Insurance	167	1,522	262	3,097	3,097	
TSA Exec ER Paid	6,892	8,267	7,800	7,798	7,798	
Long Term Disability	876	431	1,492	1,468	1,468	
FSA/HSA	2,200	1,072	10,600	10,600	10,600	
TSA Classified ER Paid Health Insurance Option	817	4,086	-	-	-	
BENEFITS	233,100	281,512	353,909	356,009	356,009	
Professional Growth	1,500	750	1,000	37,000	37,000	
Professional Instr. Services	-	4,997	-	-	-	
Pupil Transportation	52	-	-	-	-	
Travel - In District	205	225	150	150	150	
Travel - Out of District	9,699	9,302	5,250	5,800	5,800	
Postage	-	16	10	10	10	
Legal	13,276	16,810	50,000	50,000	50,000	
Other Licensed Subs	-	335	-	-	-	
Other Classified Subs	-	210	-	-	-	
PURCHASED SERVICES	24,732	32,645	56,410	92,960	92,960	
Supplies and Materials	6,917	5,110	18,330	18,700	18,700	
Periodicals	-	275	-	200	200	
Non-Consumables	1,056	1,080	1,200	1,200	1,200	
Software	-	8,879	8,300	8,300	8,300	
SUPPLIES	7,974	15,344	27,830	28,600	28,600	
Dues/Fees/Memberships	70,569	6,563	5,500	8,600	8,600	
Settlements and Judgements	-	-	-	15,000	15,000	
OTHER OBJECTS	70,569	6,563	5,500	23,600	23,600	
STUDENT SUPPORT SERVICES	817,273	904,052	1,119,128	1,221,006	1,221,006	



Function 2190 provides SpEd support services across the District. Activities include the direction and management of Special Education programs and other student behavioral support. Professional Growth is to cover expenses for COSA SpEd & Law Conferences, Transition Conferences to support students ages 18-21, SynergySE Conference and Assistive Technology Training. The FY26-27 budget of \$1.22M is up \$0.10 M or 9.1% when compared to the FY25-26 budget. About half of the spending increase due to the previously noted professional development plus \$15K for settlements and judgements. The other half is due to COLA and STEP increases and the associated payroll costs on those increases. Total staffing across all funds is 6.0 FTE. While the total FTE is the same as the amended budget, there has been a shift of roles within the FTE. There will be a reduction of 3 FTE Coordinator positions replaced with 1 FTE Assistant Director, and 2 SpEd TOSA's.

General Fund Detail Budget - 2191 Student Wellness

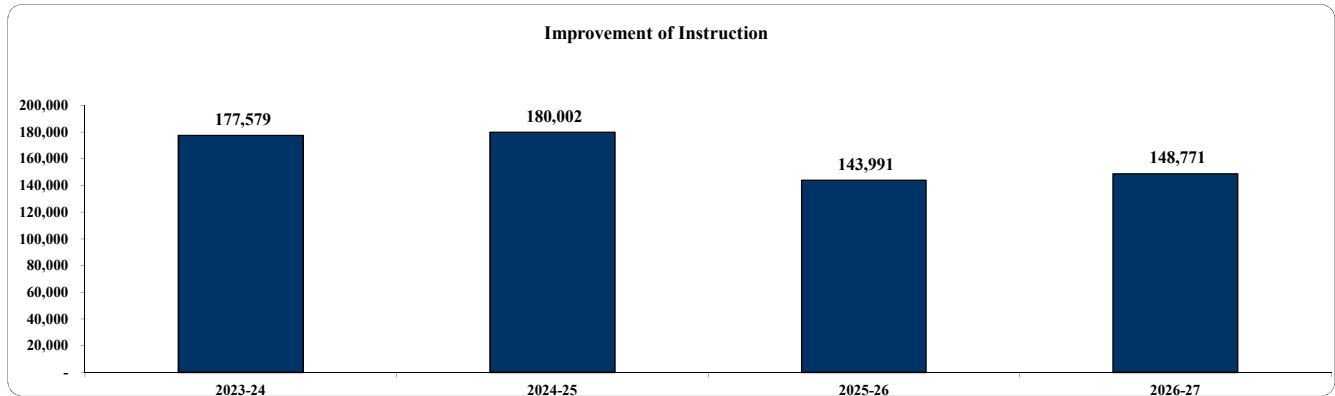
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Classified	44,525	52,929	49,054	70,209	70,209	
Administrators Salaries	67,954	84,725	82,559	89,448	89,448	
Classified Temporary	1,620	-	-	-	-	
Classified Overtime	341	646	-	-	-	
SALARIES & WAGES	114,439	137,698	131,613	159,657	159,657	
PERS	30,119	36,120	38,211	47,433	47,433	
Social Security	6,907	8,280	8,160	9,899	9,899	
Medicare	1,615	1,937	1,908	2,315	2,315	
Workers Compensation	364	637	608	738	738	
Unemployment	130	33	614	1,597	1,597	
Oregon Paid Leave	453	551	526	639	639	
Health Insurance	25,507	28,025	28,110	26,379	26,379	
Life Insurance	43	305	28	28	28	
TSA Exec ER Paid	1,514	4,402	375	1,800	1,800	
Long Term Disability	-	57	285	159	159	
FSA/HSA	300	300	4,400	4,800	4,800	
TSA Classified ER Paid Health Insurance Option	1,230	600	-	-	-	
BENEFITS	68,183	81,246	83,226	95,785	95,785	
Professional Growth	-	600	-	3,000	3,000	
Professional Instr. Services	62,985	87,803	100,000	100,000	100,000	
Rental	420	1,410	-	-	-	
Travel - In District	101	509	500	1,500	1,500	
Travel - Out of District	1,557	3,244	2,100	3,000	3,000	
Postage	14	-	50	50	50	
Legal	-	419	-	-	-	
Professional Services	-	-	70,000	-	-	
PURCHASED SERVICES	65,076	93,985	172,650	107,550	107,550	
Supplies and Materials	8,574	4,870	11,100	8,100	8,100	
SUPPLIES	8,574	4,870	11,100	8,100	8,100	
Dues/Fees/Memberships	6,084	2,674	500	1,500	1,500	
OTHER OBJECTS	6,084	2,674	500	1,500	1,500	
STUDENT WELLNESS	262,356	320,473	399,089	372,592	372,592	



Function 2191 supports the student service area directed toward students' overall health and wellness K-12. MSD strives for ALL students to be ready and available for learning and recognizes that this starts with physical, emotional, and mental wellbeing. The \$100k in Professional Instructional Services currently pays for K-12 SEL curriculum and is funded by Medicaid billing revenue. This function has 1.5 FTE which is equal to last year.

General Fund Detail Budget - 2211 Improvement of Instruction

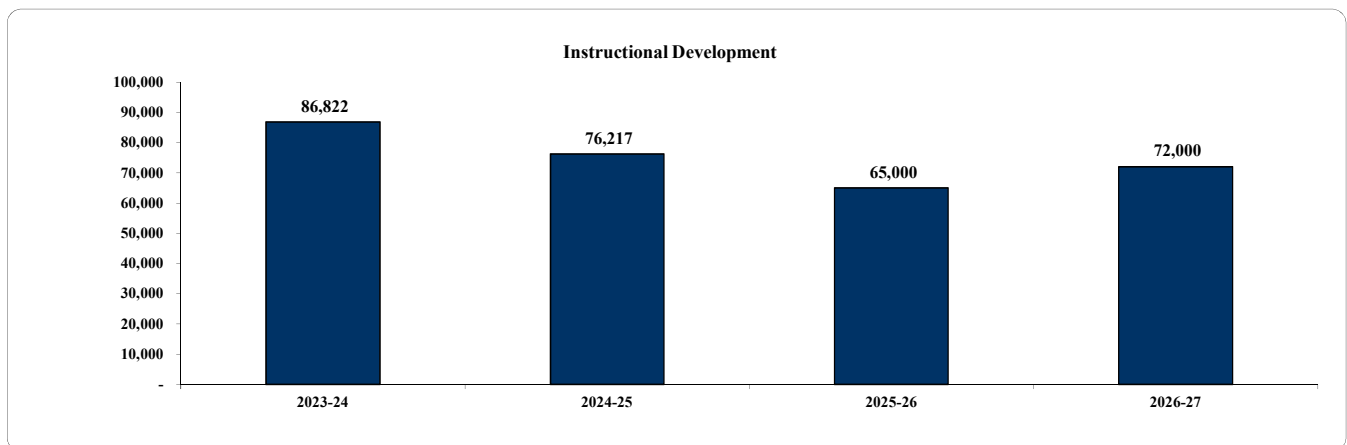
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Classified	34,713	36,273	37,586	39,183	39,183	
Administrators Salaries	85,074	83,322	53,029	57,018	57,018	
Classified Overtime	49	73	-	-	-	
Insurance Opt Out	900	1,300	4,800	-	-	
SALARIES & WAGES	120,736	120,368	95,415	96,201	96,201	
PERS	32,027	31,605	27,051	28,644	28,644	
Social Security	7,390	7,101	5,618	5,964	5,964	
Medicare	1,728	1,720	1,314	1,395	1,395	
Workers Compensation	383	792	419	444	444	
Unemployment	135	29	261	962	962	
Oregon Paid Leave	435	465	362	385	385	
Health Insurance	8,137	12,440	7,808	8,925	8,925	
Life Insurance	39	262	55	28	28	
TSA Exec ER Paid	4,194	2,939	1,800	1,800	1,800	
Long Term Disability	61	73	114	122	122	
FSA/HSA	-	168	1,800	1,800	1,800	
TSA Classified ER Paid Health Insurance Option	298	324	600	600	600	
BENEFITS	54,825	57,918	47,201	51,070	51,070	
Professional Growth	-	1,500	-	-	-	
Travel - Out of District	699	-	375	400	400	
Professional Services	-	-	200	200	200	
PURCHASED SERVICES	699	1,500	575	600	600	
Supplies and Materials	919	216	750	850	850	
Non-Consumables	399	-	50	50	50	
SUPPLIES	1,318	216	800	900	900	
IMPROV. OF INSTRUCTION	177,579	180,002	143,991	148,771	148,771	



Function 2211 is for activities associated with directing and managing the instructional staff in planning, developing, and evaluating the process providing learning experiences for students. Staffing in the General Fund for the Improvement of Instruction function is flat to current levels. Total staffing is 3.22 FTE.

General Fund Detail Budget - 2212 Instructional Development

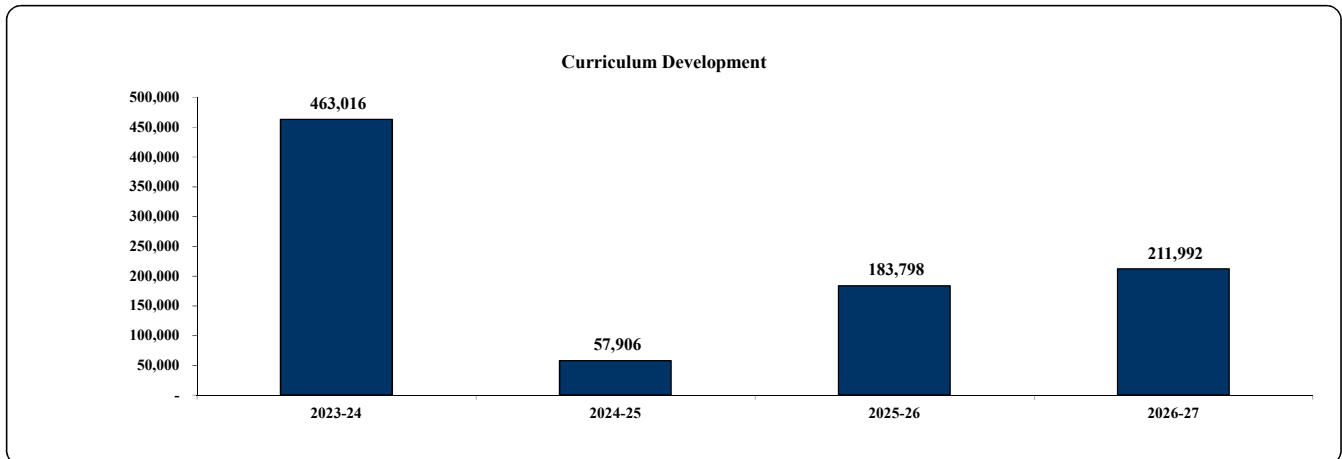
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Classified	17,089	5,131	-	-	-	-
Classified Overtime	43	6	-	-	-	-
SALARIES & WAGES	17,133	5,138	-	-	-	-
PERS	4,777	888	-	-	-	-
Social Security/Medicare	1,056	318	-	-	-	-
Medicare	247	74	-	-	-	-
Workers Compensation	35	23	-	-	-	-
Unemployment	17	1	-	-	-	-
Oregon Paid Leave	69	21	-	-	-	-
Health Insurance	7,652	745	-	-	-	-
Life Insurance	6	7	-	-	-	-
TSA-ER Paid	600	-	-	-	-	-
Lon Term Disability	600	-	-	-	-	-
403B Monthly Match	485	-	-	-	-	-
BENEFITS	15,542	2,078	-	-	-	-
Professional Growth	54,034	69,002	55,000	72,000	72,000	-
Professional Instr. Services	-	-	10,000	-	-	-
Travel - In District	113	-	-	-	-	-
PURCHASED SERVICES	54,147	69,002	65,000	72,000	72,000	-
INSTRUCTIONAL DEVELOPMENT	86,822	76,217	65,000	72,000	72,000	-



Function 2212 is for differentiated professional development for teachers. Per the Medford Education Association (MEA) Collective Bargaining Agreement, all bargaining unit members are allocated \$75 (increased from \$50 in prior years) for in-service use each contract year. Additionally, MEA bargaining unit members may also access tuition reimbursement for a portion of the tuition fee for courses directly related to the employee's instructional assignment. Spending is expected to be flat to the current year. There are no FTE in this function.

General Fund Detail Budget - 2213 Curriculum Development

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Administrators Salaries	114,012	-	-	-	-	-
Licensed Temporary	93,879	153	75,000	98,531	98,531	
Classified Temporary	-	-	1,000	1,000	1,000	
Classified Overtime	-	-	1,160	1,160	1,160	
Insurance Opt Out	71	-	-	-	-	
SALARIES & WAGES	207,962	153	77,160	100,691	100,691	
PERS	60,632	54	11,007	19,880	19,880	
Social Security	12,660	9	4,784	6,243	6,243	
Medicare	2,961	2	1,119	1,460	1,460	
Workers Compensation	821	1	356	465	465	
Unemployment	208	0	360	1,007	1,007	
Oregon Paid Leave	832	1	500	94	94	
Health Insurance	7,814	435	-	-	-	
Life Insurance	67	-	-	-	-	
TSA Exec ER Paid	900	1	1,512	-	-	
Long Term Disability	157	96	-	52	52	
TSA Classified ER Paid Health Insurance Option	3	-	-	600	600	
BENEFITS	87,053	599	19,638	29,801	29,801	
Professional Growth	30,190	-	-	-	-	
Travel - Out of District	1,016	48	10,500	10,500	10,500	
Tuition	1,500	-	-	-	-	
PURCHASED SERVICES	32,706	48	10,500	10,500	10,500	
Supplies and Materials	4,185	2,213	12,000	9,000	9,000	
Textbooks	68,877	32,095	40,000	40,000	40,000	
Non-Consumables	4,984	894	3,000	3,000	3,000	
Software	40,934	4,108	5,000	2,500	2,500	
SUPPLIES	118,979	39,310	60,000	54,500	54,500	
Dues/Fees/Memberships	16,315	17,796	16,500	16,500	16,500	
OTHER OBJECTS	16,315	17,796	16,500	16,500	16,500	
CURRICULUM DEVELOPMENT	463,016	57,906	183,798	211,992	211,992	

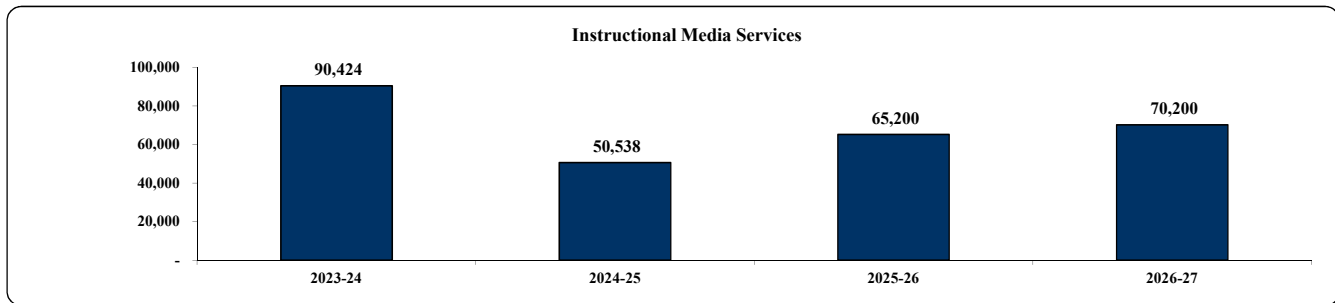


Function 2213 supports K-12 District initiatives for the improvement of instruction through ongoing curriculum development. FY26-27 spending is \$0.21M, 0.028M higher than the FY25-26 Budget. This function fluctuates from year to year based on the specific curriculum needs. The budget for textbooks includes annual textbook replenishment. Computer software includes ongoing hosting fees, and other tools for students to access curriculum.

Staffing across all funds for FY26-27 is 1.0 FTE (housed in the SIA grant), which is 1.0 FTE lower than FY25-26.

General Fund Detail Budget - 2021 Instructional Media Center Services

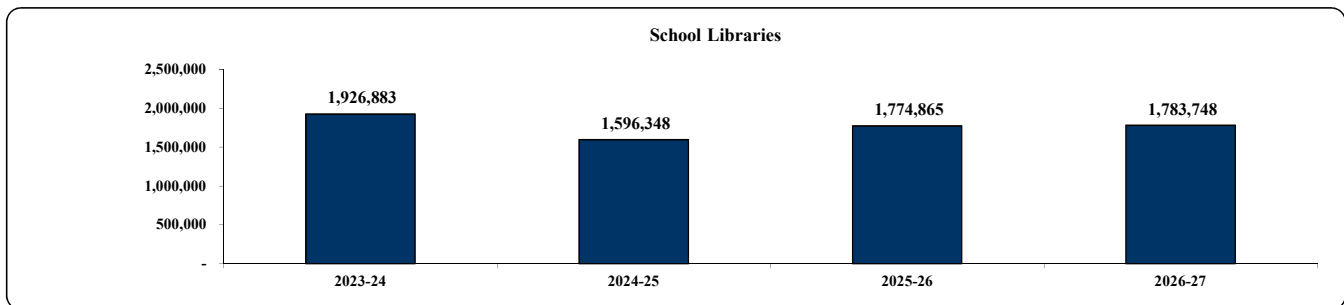
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed Temporary	298	-	-	-	-	-
SALARIES & WAGES	298	-	-	-	-	-
PERS	100	-	-	-	-	-
Social Security	18	-	-	-	-	-
Medicare	4	-	-	-	-	-
Workers Compensation	2	-	-	-	-	-
Oregon Paid Leave	1	-	-	-	-	-
Health Insurance	32	-	-	-	-	-
Life Insurance	0	-	-	-	-	-
TSA Exec ER Paid	2	-	-	-	-	-
Long Term Disability	117	29	-	-	-	-
BENEFITS	276	29	-	-	-	-
Travel - In District	692	-	200	200	200	-
Travel - Out of District	523	-	-	-	-	-
PURCHASED SERVICES	1,215	-	200	200	200	-
Supplies and Materials	20,559	4,464	20,000	20,000	20,000	-
Textbooks	-	160	-	-	-	-
Library Books	19,161	(158)	-	-	-	-
Periodicals	197	-	-	-	-	-
Software	48,454	46,043	45,000	50,000	50,000	-
SUPPLIES	88,371	50,509	65,000	70,000	70,000	-
Dues/Fees/Memberships	263	-	-	-	-	-
OTHER OBJECTS	263	-	-	-	-	-
INSTRUCTIONAL MEDIA SERVICES	90,424	50,538	65,200	70,200	70,200	-



Function 221 is for activities involved in the direction and management of educational media services used by teachers. This includes printed instructional materials and Destiny (our library information system) which includes digital reading resources, online digital library book access for students and teachers, and audio and video tools for recording real-time teaching. The Instructional Media Center (IMC) processes printed instructional materials, which includes barcoding and labeling, adding them to our digital library catalog, and covering them with a protective coating so they are shelf-ready.

General Fund Detail Budget - 2222 School Libraries

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	418,971	88,991	91,105	94,976	94,976	
Classified	644,062	768,609	840,032	892,612	892,612	
Licensed Temporary	2,738	355	557	557	557	
Classified Temporary	1,940	2,929	220	220	220	
Additional Salary	-	3,000	-	-	-	
Classified Overtime	5,363	10,477	6,240	6,240	6,240	
Insurance Opt Out	7,432	24,773	13,500	14,400	14,400	
SALARIES & WAGES	1,080,505	899,133	951,653	1,009,005	1,009,005	
PERS	325,545	245,649	292,887	271,694	271,694	
Social Security	65,123	54,196	58,261	61,761	61,761	
Medicare	15,230	12,675	13,626	14,444	14,444	
Workers Compensation	3,342	5,511	4,341	4,602	4,602	
Unemployment	1,094	216	4,383	9,961	9,961	
Oregon Paid Leave	4,322	3,597	4,724	3,950	3,950	
Health Insurance	275,788	191,730	246,401	211,588	211,588	
Life Insurance	294	1,986	317	1,817	1,817	
TSA Exec ER Paid	17,237	14,788	12,500	13,800	13,800	
Long Term Disability	2,786	1,183	4,373	1,166	1,166	
125 Plan Ins Opt Out	12,118	6,600	6,600	6,800	6,800	
TSA Classified ER Paid Health Insurance Option Health	7,811	8,383	3,005	1,800	1,800	
BENEFITS	730,691	546,514	651,419	603,385	603,385	
Travel - In District	4	2,088	2,000	3,000	3,000	
Travel - Out of District	343	-	750	750	750	
Other Licensed Subs	787	-	-	-	-	
Other Classified Subs	8,905	14,882	1,545	1,545	1,545	
PURCHASED SERVICES	10,039	16,971	4,295	5,295	5,295	
Supplies and Materials	10,557	13,739	12,543	11,786	11,786	
Library Books	85,604	110,656	141,350	141,700	141,700	
Periodicals	2,619	1,535	4,084	3,057	3,057	
Non-Consumables	1,267	2,830	1,030	1,030	1,030	
Software	2,897	794	6,000	6,000	6,000	
Accelerated Reader Software	2,163	2,020	2,165	2,165	2,165	
Hardware Under \$5000	-	1,499	-	-	-	
SUPPLIES	105,107	133,073	167,172	165,738	165,738	
Dues/Fees/Memberships	541	658	325	325	325	
OTHER OBJECTS	541	658	325	325	325	
SCHOOL LIBRARIES	1,926,883	1,596,348	1,774,865	1,783,748	1,783,748	

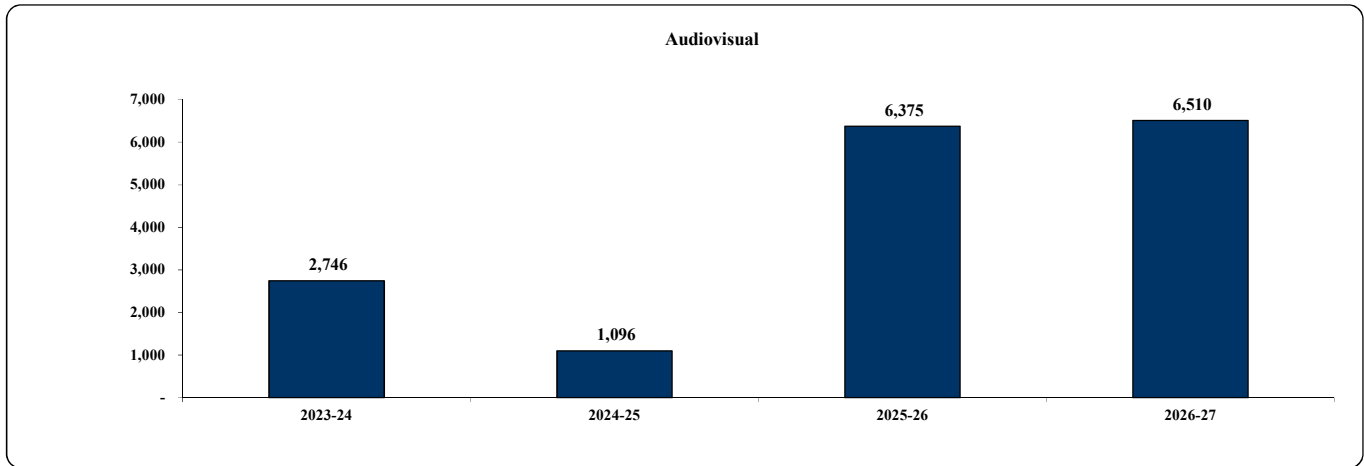


Function 2222 includes staff, services, books, periodicals, technology, supplies, and other resources for school libraries. Each of our schools has one Media Center Technician (except the comprehensive high schools who have two) and the support of the certified K-12 District Library Media Specialist.

FY26-27 Budget spending is \$1.78M. Staffing is 22.47 FTE, which is flat to the prior year. Goals for this function include creating a captivating and sustainable vision for MSD schools' media centers that increase student and class visits to our media centers and creating a system that supports and teaches Oregon Schools Library Standards.

General Fund Detail Budget - 2223 Audiovisual

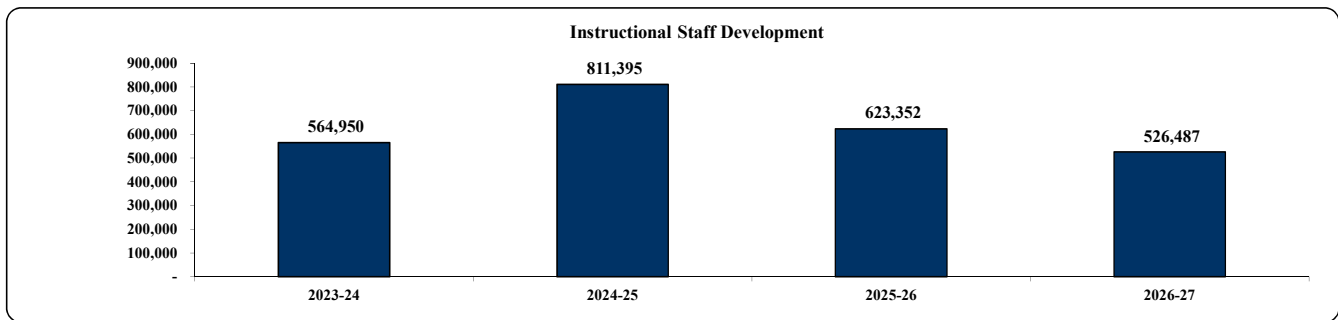
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Supplies and Materials	1,252	512	2,025	2,160	2,160	
Non-Consumables	-	-	1,000	1,000	1,000	
Hardware Under \$5000	1,494	584	3,050	3,050	3,050	
SUPPLIES	2,746	1,096	6,075	6,210	6,210	
Dues/Fees/Memberships		-	300	300	300	
OTHER OBJECTS	-	-	300	300	300	
AUDIOVISUAL	2,746	1,096	6,375	6,510	6,510	



Function 2223 includes materials, supplies, and equipment for multimedia services used by instructional and administrative staff. Expenditures are based on need and are flat compared to prior years.

General Fund Detail Budget - 2240 Instructional Staff Development

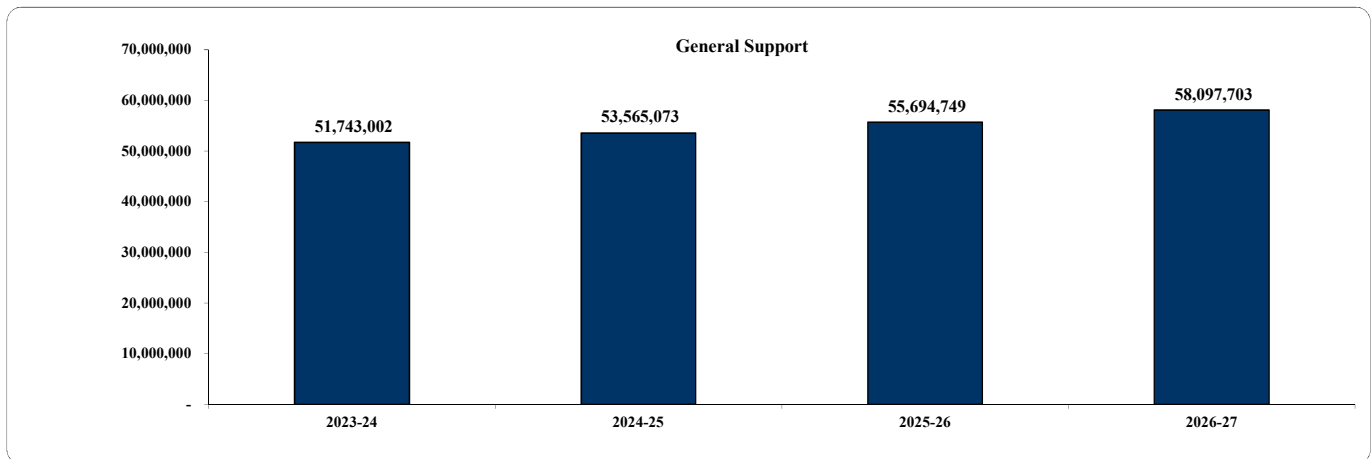
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed Temporary	343,903	409,334	194,442	170,000	170,000	
Classified Overtime	-	-	227	227	227	
Insurance Opt Out	101	147	-	-	-	
SALARIES & WAGES	344,004	409,481	194,669	170,227	170,227	
PERS	50,260	129,354	88,179	46,322	46,322	
Social Security	21,088	24,944	39,683	22,323	22,323	
Medicare	4,932	5,834	9,281	5,221	5,221	
Workers Compensation	863	2,020	2,957	1,663	1,663	
Unemployment	440	97	2,986	3,601	3,601	
Oregon Paid Leave	661	1,638	44	-	-	
Health Insurance	450	34,226	-	-	-	
Life Insurance	2	522	-	-	-	
TSA Exec ER Paid	1,165	3,267	-	-	-	
Long Term Disability	396	99	24	-	-	
TSA - Employer Contribution	-	-	600	-	-	
BENEFITS	80,257	202,002	143,754	79,131	79,131	
Professional Growth	19,144	26,900	21,000	17,000	17,000	
Professional Instr. Services	2,980	59,000	61,000	60,000	60,000	
Travel - In District	1,784	1,035	300	600	600	
Travel - Out of District	2,550	11,312	2,000	2,000	2,000	
Professional Services	342	480	300	700	700	
Other Licensed Subs	98,108	88,061	188,490	188,490	188,490	
Other Classified Subs	2,646	1,415	1,339	1,339	1,339	
PURCHASED SERVICES	127,554	188,203	274,429	270,129	270,129	
Supplies and Materials	8,723	7,596	6,500	3,800	3,800	
Software	-	-	1,000	1,000	1,000	
SUPPLIES	8,723	7,596	7,500	4,800	4,800	
Dues/Fees/Memberships	4,413	4,113	3,000	2,200	2,200	
OTHER OBJECTS	4,413	4,113	3,000	2,200	2,200	
INSTR. STAFF DEVELOPMENT	564,950	811,395	623,352	526,487	526,487	



Function 2240 supports activities designed to train licensed and non-licensed staff in the use of District instructional resources and best teaching practices to improve instruction and support curriculum adoption. This function includes training for new teacher orientation as well as a contract with the ESD to hire experienced teachers to mentor new teachers who join the district. The FY26-27 Budget of \$0.5M is lower than the prior year by \$0.1 M or 15.5% due to year to year variation in need to support staff/curriculum implementations. There is no designated staffing in this function.

General Fund Expenditures - General Support Functions

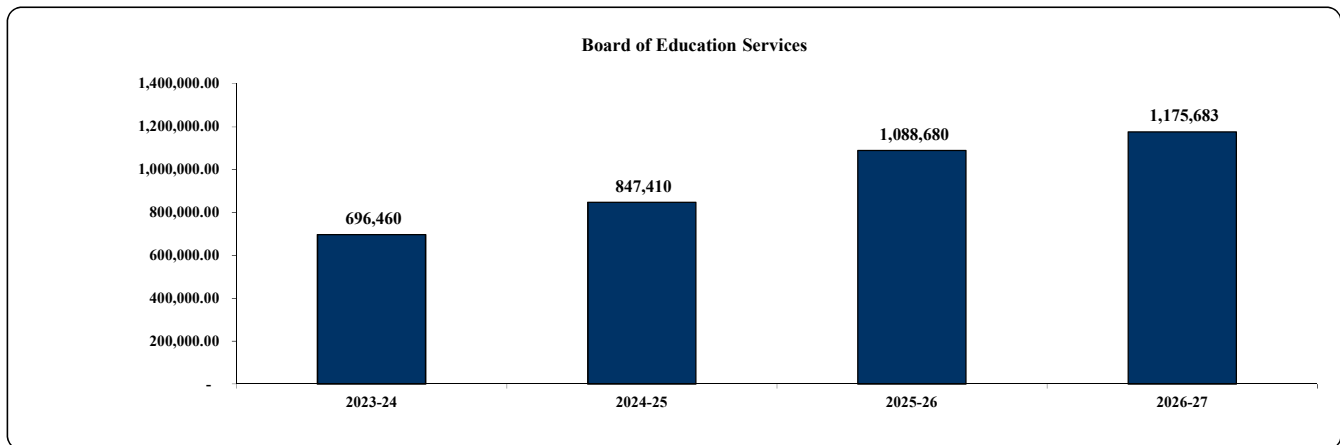
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Board of Education	696,460	847,410	1,088,680	1,175,683	1,175,683	
Office of Superintendent	1,313,781	1,323,002	1,249,166	1,325,881	1,325,881	
Communications	538,218	569,420	521,595	545,937	545,937	
Teaching and Learning	1,791,740	1,731,450	1,758,637	1,436,455	1,436,455	
Secondary Athletics	329,157	334,303	339,267	372,422	372,422	
Office of the Principal	10,970,528	11,467,913	11,995,691	12,735,432	12,735,432	
Business Services	1,273,557	1,308,230	1,341,382	1,425,988	1,425,988	
Other Fiscal Services	59,624	83,635	93,756	95,000	95,000	
Custodial	5,372,082	5,948,284	6,159,422	6,367,913	6,367,913	
Maintenance Services	10,948,864	12,016,728	11,920,421	12,356,897	12,356,897	
Vehicle Maintenance	189,792	246,642	200,000	215,000	215,000	
Building Security	102,190	175,509	208,000	185,500	185,500	
Student Transportation	5,686,845	6,396,411	7,106,036	7,353,700	7,353,700	
Purchasing and Distribution	888,499	402,409	339,378	358,826	358,826	
Printing and Publishing	264,805	265,505	272,440	251,547	251,547	
Human Resources	1,818,079	1,542,867	1,851,787	1,806,212	1,806,212	
Information Technology	4,966,048	4,723,041	5,082,619	5,126,814	5,126,814	
Network and Telecommunications	3,351,687	3,054,798	2,982,000	3,766,000	3,766,000	
Early Retirement	1,181,045	1,127,518	1,184,471	1,196,495	1,196,495	
GENERAL SUPPORT	51,743,002	53,565,073	55,694,749	58,097,703	58,097,703	



The FY26-27 Budget for the General Support functions is \$58.1M, up \$2.4M (4.3%) from the FY25-26 Budget. The total FTE in these functions is 277.87 FTE, which is 7 FTE less than the prior year. Spending variances compared to the FY25-26 Budget for each function are described in the following pages.

General Fund Detail Budget - 2310 Board of Education Services

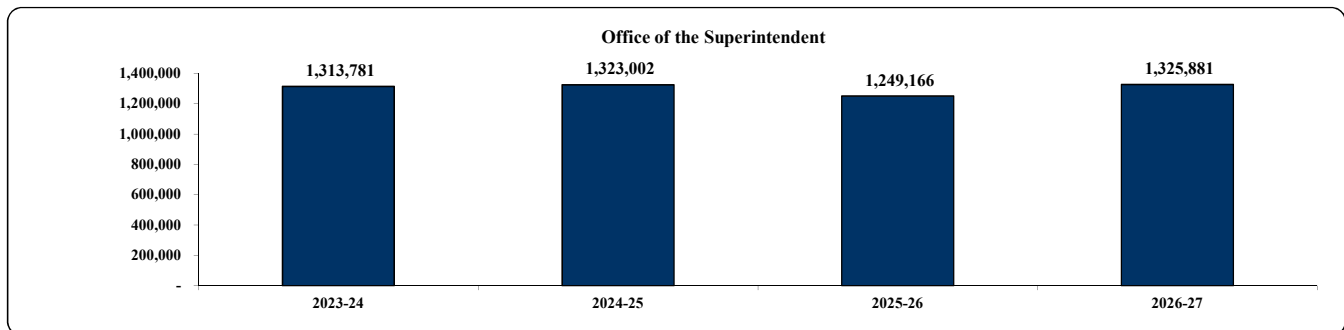
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Professional Growth	78	24	-	-	-	-
Rental Expense	1,290	330	-	1,000	1,000	-
Travel - In District	-	29	500	500	500	-
Travel - Out of District	20,201	29,522	7,500	13,000	13,000	-
Advertising	1,014	2,338	-	1,500	1,500	-
Postage	29	-	-	-	-	-
Audit	63,580	52,310	60,000	60,000	60,000	-
Legal	14,144	58,510	60,000	50,000	50,000	-
Elections	-	27,836	20,000	30,000	30,000	-
Professional Services	-	21,743	25,000	15,000	15,000	-
PURCHASED SERVICES	100,336	192,642	173,000	171,000	171,000	-
Supplies and Materials	10,007	9,493	7,210	12,000	12,000	-
SUPPLIES	10,007	9,493	7,210	12,000	12,000	-
Dues/Fees/Memberships	22,006	15,536	56,340	56,340	56,340	-
Liability Insurance	539,111	629,738	842,130	926,343	926,343	-
Legal Settlements	25,000	-	10,000	10,000	10,000	-
OTHER OBJECTS	586,117	645,274	908,470	992,683	992,683	-
BOARD OF EDUCATION SERVICES	696,460	847,410	1,088,680	1,175,683	1,175,683	-



Function 2310 includes expenses for policy development, audits, legal services, elections, dues, liability insurance and other responsibilities of the governing body. FY26-27 spending is \$0.087M higher than FY25-26 due to higher liability insurance.

General Fund Detail Budget - 2321 Office of the Superintendent

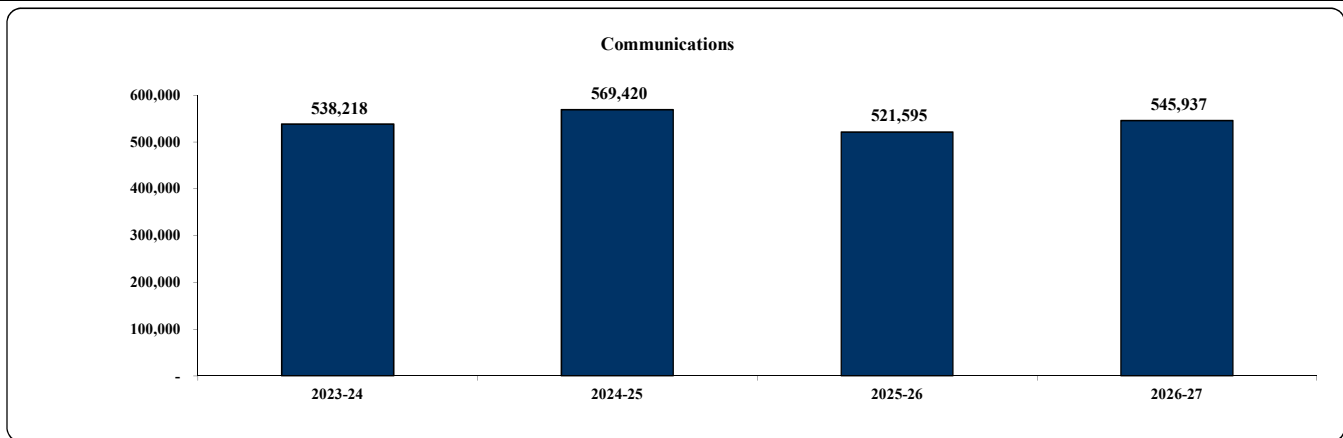
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Classified	241,347	256,740	268,524	278,173	278,173	
Administrators Salaries	502,934	543,529	502,119	528,012	528,012	
Classified Temporary	-	-	4,102	4,102	4,102	
Classified Overtime	-	-	672	672	672	
SALARIES & WAGES	744,281	800,269	775,417	810,959	810,959	
PERS	186,456	186,322	217,587	241,554	241,554	
Social Security	36,215	37,355	49,936	50,279	50,279	
Medicare	10,664	11,495	11,679	11,759	11,759	
Workers Compensation	2,389	3,767	3,721	3,747	3,747	
Unemployment	774	192	3,757	8,110	8,110	
Oregon Paid Leave	2,168	2,434	3,203	3,225	3,225	
Health Insurance	50,960	50,644	34,740	52,371	52,371	
Life Insurance	169	1,626	69	69	69	
TSA-Employer Paid	26,715	27,180	6,600	4,200	4,200	
Long Term Disability	542	495	617	1,209	1,209	
FSA/HSA	2,250	2,250	5,000	2,200	2,200	
TSA Classified ER Paid Health Insurance Option Health	2,984	2,660	600	-	-	
BENEFITS	322,286	326,420	337,508	378,722	378,722	
Professional Growth	686	1,164	5,000	5,000	5,000	
Rental Expense	235	438	-	1,500	1,500	
Pupil Transportation	-	83	-	-	-	
Travel - In District	361	43	1,250	1,050	1,050	
Travel - Out of District	5,722	39,908	12,000	12,000	12,000	
Postage	7,313	16,145	25,000	25,000	25,000	
Advertising	1,725	2,500	2,500	2,500	2,500	
Printing	324	-	-	-	-	
Legal	33,611	70,309	20,000	20,000	20,000	
Professional Services	143,403	21,001	30,000	17,000	17,000	
PURCHASED SERVICES	193,378	151,591	95,750	85,350	85,350	
Supplies and Materials	50,256	33,789	20,600	30,450	30,450	
Periodicals	-	331	450	400	400	
SUPPLIES	50,256	34,120	21,050	30,850	30,850	
Dues/Fees/Memberships	3,579	10,603	19,440	20,000	20,000	
OTHER OBJECTS	3,579	10,603	19,440	20,000	20,000	
OFFICE OF THE SUPERINTENDENT	1,313,781	1,323,002	1,249,166	1,325,881	1,325,881	



Function 2321 includes services, supplies, travel, postage, materials, and staff to support the Superintendent's office. The FY26-27 budgeted spending is \$1.325M, which is up \$0.076M 6.14% primarily driven by COLA and STEP wage increases along with associated payroll costs on those increases. Staffing for this department is 4.75 FTE, equal to the prior year.

General Fund Detail Budget - 2322 Communications

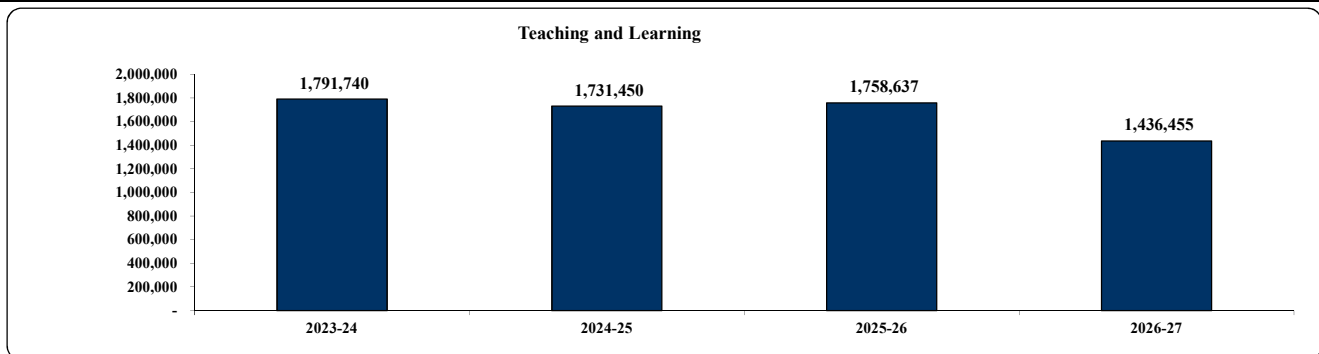
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Classified	114,072	147,167	215,926	231,375	231,375	
Administrators Salaries	155,628	191,247	66,527	66,527	66,527	
Classified Overtime	536	184	-	-	-	
Insurance Opt Out	1,700	-	2,400	2,400	2,400	
SALARIES & WAGES	271,936	337,996	284,853	300,302	300,302	
PERS	61,175	82,180	81,953	86,361	86,361	
Social Security	16,680	20,511	17,512	18,470	18,470	
Medicare	3,901	4,797	4,096	4,320	4,320	
Workers Compensation	854	1,715	1,305	1,376	1,376	
Unemployment	302	79	1,759	2,979	2,979	
Oregon Paid Leave	1,053	1,352	1,130	1,192	1,192	
Health Insurance	32,233	47,959	44,881	46,771	46,771	
Life Insurance	88	696	83	55	55	
TSA-Employer Paid	7,951	8,443	3,000	3,000	3,000	
Long Term Disability	-	138	463	487	487	
FSA/HSA	2,200	1,200	600	600	600	
TSA Classified ER Paid Health Insurance Option Health	1,345	1,447	1,200	1,200	1,200	
BENEFITS	127,781	170,518	157,981	166,810	166,810	
Travel - In District	1,609	1,386	-	-	-	
Travel - Out of District	1,771	6,812	4,125	4,125	4,125	
Advertising	70,283	40,953	50,000	50,000	50,000	
Professional Services	40,310	1,489	15,000	15,000	15,000	
Other Classified Subs	1,078	941	-	-	-	
PURCHASED SERVICES	115,051	51,581	69,125	69,125	69,125	
Supplies and Materials	13,509	3,934	4,236	4,300	4,300	
Non-Consumables	-	548	-	-	-	
SUPPLIES	13,509	4,481	4,236	4,300	4,300	
Dues/Fees/Memberships	9,941	4,843	5,400	5,400	5,400	
OTHER OBJECTS	9,941	4,843	5,400	5,400	5,400	
COMMUNICATIONS	538,218	569,420	521,595	545,937	545,937	



The communications and community engagement office supports schools and students by coordinating communication and engagement with families, staff, and our community. The team is the primary point of contact for the news media and manages all District and school websites and social media. It also coordinates direct family engagement and community-wide events. MSD values the input of staff, families, and community members. The communications department works to gather feedback from all stakeholders using a variety of mechanisms. The communications department also produces publications and videos, and keeps families and staff up-to-date on the latest District news and information using a mass notification system. Professional services includes signs for the District to help inform the public of events as well to keep buildings up to date. Spending and staffing in this function are essentially equal to prior year. This function includes 3.4 FTE, which is flat compared to the prior year.

General Fund Detail Budget - 2327 Teaching and Learning

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	86,886	85,677	94,122	98,122	98,122	
Classified	269,475	285,610	212,950	225,401	225,401	
Administrators Salaries	693,268	593,308	739,871	547,381	547,381	
Licensed Temporary	1,547	-	-	-	-	
Additional Salary	-	1,500	-	-	-	
Classified Overtime	4,548	3,692	8,500	8,500	8,500	
Extra Duty Compensation	-	-	-	-	-	
Insurance Opt Out	4,200	9,020	4,800	4,800	4,800	
SALARIES & WAGES	1,059,925	978,806	1,060,243	884,205	884,205	
PERS	312,023	285,314	341,342	243,621	243,621	
Social Security	60,265	54,937	73,283	54,523	54,523	
Medicare	14,865	13,847	14,629	12,751	12,751	
Workers Compensation	3,395	4,690	4,661	4,063	4,063	
Unemployment	1,137	233	5,292	8,794	8,794	
Oregon Paid Leave	3,726	3,619	4,002	3,484	3,484	
Health Insurance	140,052	130,512	128,116	99,607	99,607	
Life Insurance	327	2,124	193	97	97	
TSA - ER Paid	35,911	33,064	7,725	6,000	6,000	
Long Term Disability	355	526	1,800	1,511	1,511	
FSA/HSA	3,600	3,000	4,600	4,000	4,000	
TSA Classified ER Paid Health Insurance Option Health	3,000	3,000	-	1,200	1,200	
BENEFITS	578,657	534,867	585,644	439,650	439,650	
Professional Growth	23,396	1,749	10,000	10,000	10,000	
Professional Instr. Services	158	19,199	-	-	-	
Travel - In District	262	-	300	300	300	
Travel - Out of District	13,023	3,388	3,750	2,000	2,000	
Postage	14,250	34,528	10,000	14,000	14,000	
Tuition	-	248	-	-	-	
PURCHASED SERVICES	51,089	59,112	24,050	26,500	26,500	
Supplies and Materials	8,146	3,716	5,700	3,100	3,100	
Non-Consumables	120	4,776	500	500	500	
Software	90,610	(161,315)	80,000	80,000	80,000	
SUPPLIES	98,876	(152,824)	86,200	83,600	83,600	
Principal - SBITA	-	305,841	-	-	-	
Interest - SBITA	-	3,197	-	-	-	
Dues/Fees/Memberships	3,194	2,451	2,500	2,500	2,500	
OTHER OBJECTS	3,194	311,489	2,500	2,500	2,500	
TEACHING AND LEARNING	1,791,740	1,731,450	1,758,637	1,436,455	1,436,455	

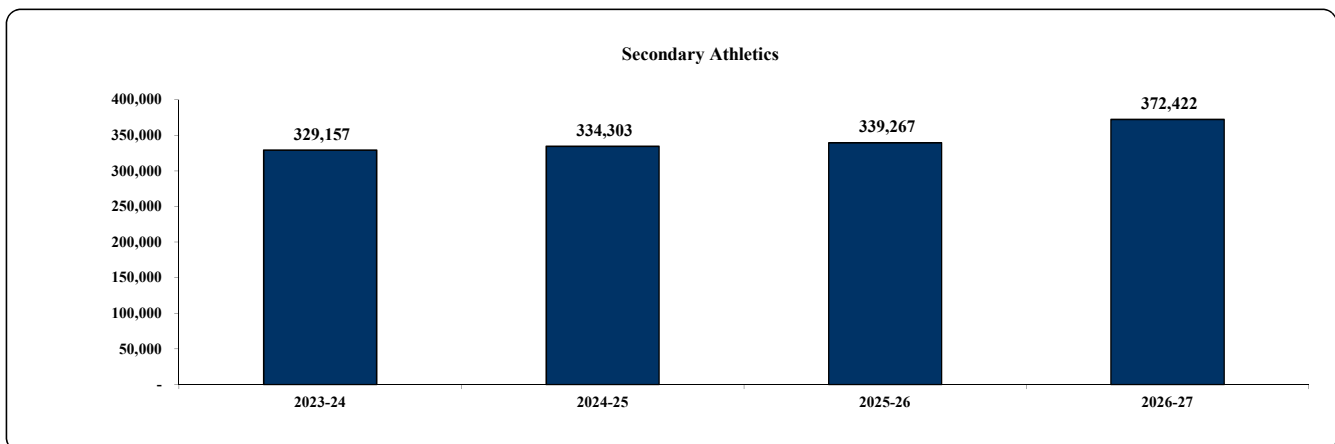


Function 2327 provides the direction and management for all elementary and secondary education, instruction, and operations. It includes staff, services, travel, professional development for staff, and supplies.

Staffing for this function is 7.0 FTE, which is -1 FTE less than the prior year. The 7 FTE includes 1 Deputy Superintendent, 2 Executive Directors, 3 Administrative Assistants, and 1 Teacher on Special Assignment.

General Fund Detail Budget - 2329 Secondary Athletics

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	1,500	(1,098)				-
Classified	60,377	61,137	69,370	65,213	65,213	
Administrators Salaries	142,109	148,545	149,945	161,301	161,301	
Classified Overtime	211	542	-	-	-	
SALARIES & WAGES	204,196	209,127	219,316	226,514	226,514	
PERS	58,238	59,477	63,929	71,003	71,003	
Social Security	12,470	12,806	13,598	14,044	14,044	
Medicare	2,916	2,995	3,180	3,284	3,284	
Workers Compensation	682	1,107	1,013	1,046	1,046	
Unemployment	219	50	1,023	2,265	2,265	
Oregon Paid Leave	814	836	877	906	906	
Health Insurance	44,011	41,263	34,872	48,978	48,978	
Life Insurance	81	490	28	28	28	
TSA - ER Paid	600	600	950	1,800	1,800	
Long Term Disability	-	97	482	354	354	
FSA/HSA/HC Opt Out	2,200	1,200	-	2,200	2,200	
TSA Classified ER Paid Health Insurance Option Health	1,800	1,768	-	-	-	
BENEFITS	124,031	122,689	119,952	145,908	145,908	
Professional Instr. Services	399	-	-	-	-	
Travel - Out of District	531	-	-	-	-	
Tuition	-	734	-	-	-	
Professional Services	-	1,753	-	-	-	
PURCHASED SERVICES	930	2,487	-	-	-	
SECONDARY ATHLETICS	329,157	334,303	339,267	372,422	372,422	



Function 2329 is used for Secondary Athletics Director. Most Secondary Athletics charges are accounted for in the Special Revenue Secondary Athletics fund (p.112) and in the General Fund functions 1122 and 1132 which includes coaching and other stipends. There are 2.0 FTE in this function.

Notes Page

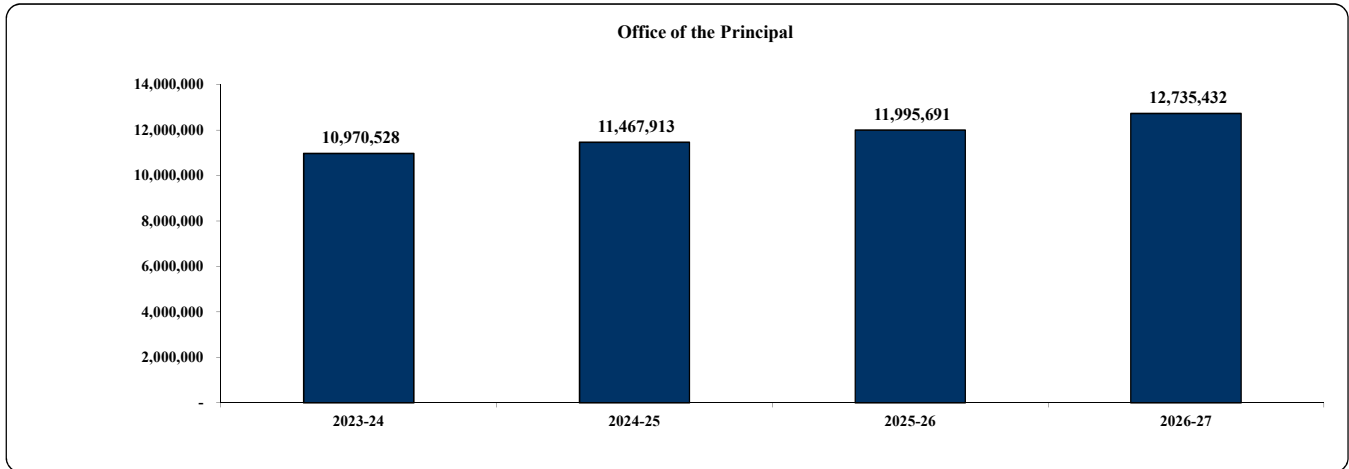


General Fund Detail Budget - 2410 Office of the Principal

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	105,804	-	-	-	-	-
Classified	2,533,399	2,614,357	2,669,863	2,826,854	2,826,854	
Administrators Salaries	3,991,019	4,351,594	4,643,096	4,798,101	4,798,101	
Classified Temporary	17,949	4,778	64,627	64,627	64,627	
Additional Salary	-	16,500	-	-	-	
Classified Overtime	97,623	96,840	62,620	62,620	62,620	
Extra Duty Compensation	(1,261)	-	-	-	-	
Insurance Opt Out	30,383	67,351	43,200	43,200	43,200	
SALARIES & WAGES	6,774,915	7,151,420	7,483,406	7,795,401	7,795,401	
PERS	1,801,060	1,892,985	2,094,091	2,223,842	2,223,842	
Social Security/Medicare	407,502	429,707	453,975	481,689	481,689	
Medicare	95,303	100,496	106,172	112,653	112,653	
Workers Compensation	20,564	37,107	33,828	35,894	35,894	
Unemployment	7,046	1,713	32,010	77,692	77,692	
Oregon Paid Leave	27,006	28,605	28,712	30,500	30,500	
Health Insurance	1,463,735	1,432,844	1,347,583	1,513,745	1,513,745	
Life Insurance	2,766	18,052	2,291	21,325	21,325	
TSA - ER Paid	45,881	47,389	88,600	88,600	88,600	
Long Term Disability	5,937	4,712	10,120	10,751	10,751	
FSA/HSA	53,014	37,871	62,400	63,571	63,571	
TSA Classified ER Paid Health Insurance Option Health	72,616	74,860	18,469	18,469	18,469	
BENEFITS	4,002,430	4,106,342	4,278,250	4,678,730	4,678,730	
Professional Growth	6,428	1,968	45,445	76,550	76,550	
Repair/Maintenance/Rentals	-	39	-	-	-	
Travel - In District	-	25	-	-	-	
Travel - Out of District	40,329	54,413	21,459	25,275	25,275	
Professional Services	1,350	-	-	-	-	
Other Licensed Subs	983	-	2,411	2,411	2,411	
Other Classified Subs	15,922	23,735	14,565	14,565	14,565	
PURCHASED SERVICES	65,011	80,186	83,879	118,801	118,801	
Supplies and Materials	92,189	94,634	98,000	92,495	92,495	
Periodicals	-	-	500	500	500	
Non-Consumables	3,355	5,045	4,700	3,550	3,550	
Software	179	187	-	-	-	
Hardware	-	338	200	200	200	
SUPPLIES	95,724	100,203	103,400	96,745	96,745	
Dues/Fees/Memberships	32,448	29,763	46,756	45,755	45,755	
OTHER OBJECTS	32,448	29,763	46,756	45,755	45,755	
OFFICE OF THE PRINCIPAL	10,970,528	11,467,913	11,995,691	12,735,432	12,735,432	

General Fund Detail Budget - 2410 Office of the Principal

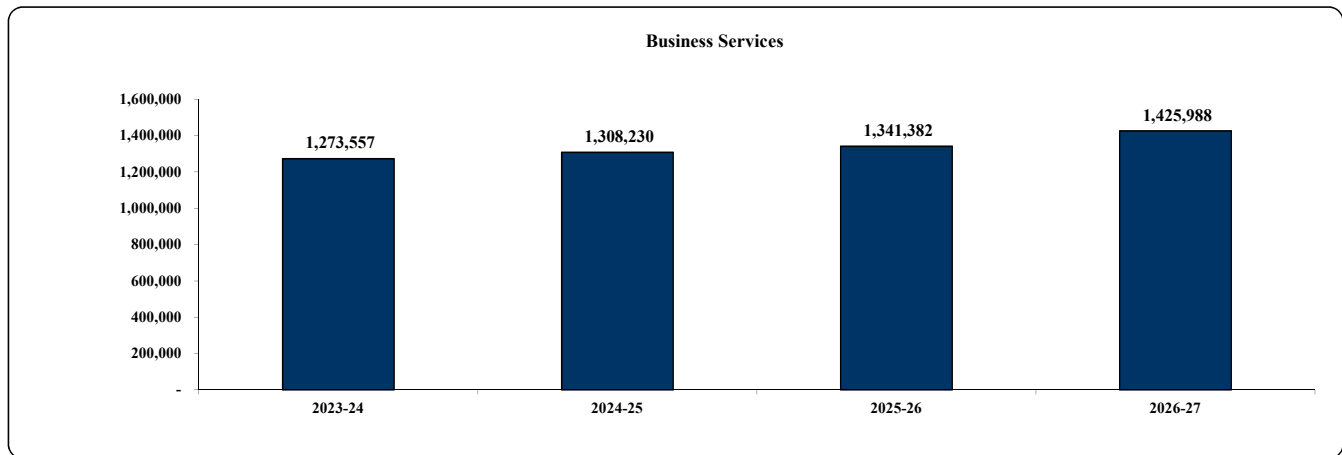
Office of the Principal Continued



Function 2410 includes services, supplies, materials, and staff to support the principals and assistant principals at all 21 Medford non-charter schools. Spending for the FY26-27 Budget is \$12.7M, which is an increase of \$0.74M or 6.1% versus the FY25-26 Budget, primary due to a 4.25% increase in COLA. Staffing across all funds is 105.22 FTE, which is flat to the prior year.

General Fund Detail Budget - 2521 Business Services

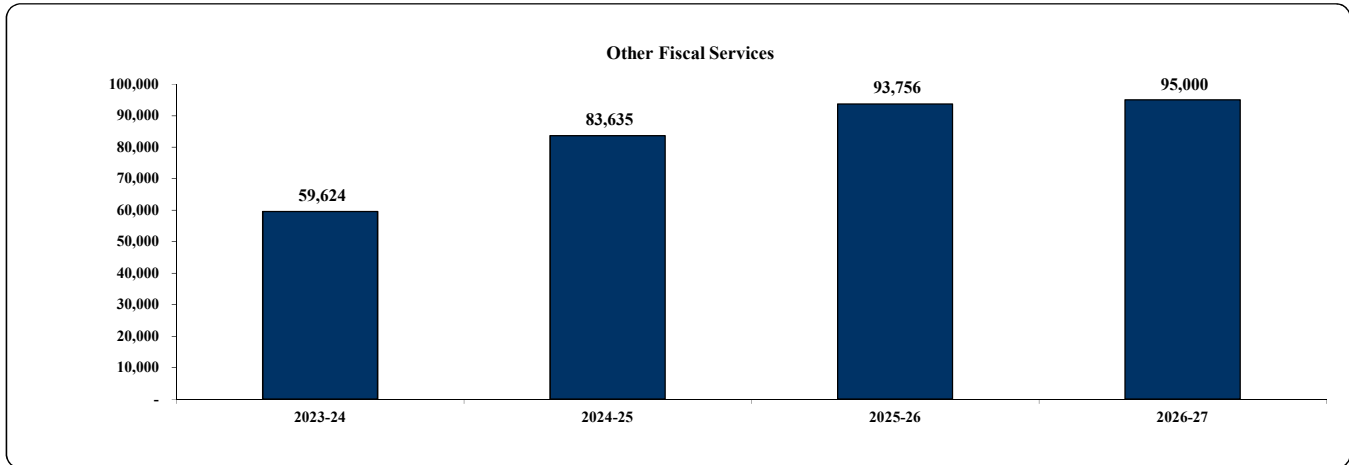
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Classified	313,625	335,339	367,369	376,345	376,345	
Classified Managers	453,758	474,248	487,416	527,146	527,146	
Classified Overtime	677	468	1,545	1,545	1,545	
Insurance Opt Out	3,700	12,340	4,800	7,200	7,200	
SALARIES & WAGES	771,760	822,395	861,130	912,236	912,236	
PERS	209,309	221,603	236,003	244,965	244,965	
Social Security/Medicare	46,411	49,799	53,092	56,112	56,112	
Medicare	10,854	11,646	12,417	13,123	13,123	
Workers Compensation	2,506	3,780	3,956	4,181	4,181	
Unemployment	972	193	3,995	9,050	9,050	
Oregon Paid Leave	3,009	3,290	3,419	3,614	3,614	
Health Insurance	149,377	123,050	111,998	126,082	126,082	
Life Insurance	175	1,774	124	124	124	
TSA - ER Paid	10,558	10,880	2,926	6,000	6,000	
Long Term Disability	767	569	1,365	751	751	
FSA/HSA	5,200	4,600	5,200	3,400	3,400	
TSA Classified ER Paid Health Insurance Option	7,180	6,600	1,200	1,200	1,200	
BENEFITS	446,317	437,784	435,695	468,602	468,602	
Travel - In District	36	-	-	-	-	
Travel - Out of District	262	785	6,603	6,600	6,600	
Training - In District	450	-	-	-	-	
Postage	-	-	10,012	10,000	10,000	
Professional Services	-	9,800	-	-	-	
PURCHASED SERVICES	748	10,585	16,615	16,600	16,600	
Supplies and Materials	3,775	4,272	3,011	3,000	3,000	
Non-Consumables	650	68	556	550	550	
SUPPLIES	4,425	4,340	3,567	3,550	3,550	
Principal - SBITA	6,335	13,650	-	-	-	
Principal - Leases	513	525	-	-	-	
Interest - Lease	26	15	-	-	-	
Dues/Fees/Memberships	43,433	18,936	24,376	25,000	25,000	
OTHER OBJECTS	50,307	33,125	24,376	25,000	25,000	
BUSINESS SERVICES	1,273,557	1,308,230	1,341,382	1,425,988	1,425,988	



Function 2521 provides the direction, management, and oversight for all District fiscal services, including accounting, accounts payable, audits, processing payroll for over 1,500 employees, and budgeting. This function includes services, supplies, and staff to support the Financial Controller. FY26-27 spending of \$1.4M is up \$.08 M or 6.3% and staffing is flat to prior year at 8.8 FTE.

General Fund Detail Budget - 2529 Other Fiscal Services

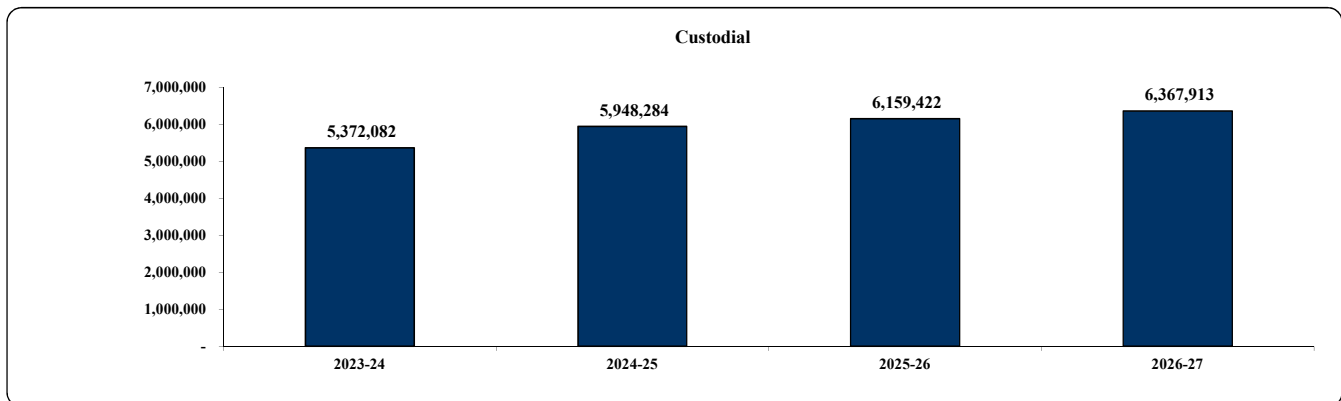
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Professional Services	17,363	22,731	22,480	23,000	23,000	
PURCHASED SERVICES	17,363	22,731	22,480	23,000	23,000	
Supplies and Materials	96	600				
Non-Consumables	-	55				
SUPPLIES	96	655	-	-		
Dues/Fees/Memberships	42,164	60,249	71,276	72,000	72,000	
OTHER OBJECTS	42,164	60,249	71,276	72,000	72,000	
OTHER FISCAL SERVICES	59,624	83,635	93,756	95,000	95,000	



Function 2529 includes services, supplies, bank fees, and credit and processing fees. Expenses are primarily for ad hoc support consulting, administrative expenses related to Section 125 flexible spending, GASB 73 and GASB 74 Other Post Employment Benefit actuarial work, and ad hoc benefits consulting such as consulting for compensation and benefits analysis.

General Fund Detail Budget - 2542 Custodial

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	1,500	(4,524)	-	-	-	-
Classified	3,000,422	3,410,443	3,609,883	3,735,561	3,735,561	3,735,561
Classified Substitutes	76,521	98,228	90,000	93,825	93,825	93,825
Classified Temporary	52,519	-	3,000	3,000	3,000	3,000
Additional Salary	-	9,000	-	-	-	-
Classified Overtime	47,720	41,025	22,734	22,734	22,734	22,734
Extra Duty Compensation	(314)	-	-	-	-	-
Insurance Opt Out	11,466	68,660	41,400	45,600	45,600	45,600
SALARIES & WAGES	3,189,834	3,622,832	3,767,016	3,900,720	3,900,720	3,900,720
PERS	738,071	893,251	955,190	990,652	990,652	990,652
Social Security	190,617	220,043	230,988	239,017	239,017	239,017
Medicare	44,580	51,462	54,021	55,899	55,899	55,899
Workers Compensation	11,097	22,149	17,212	17,811	17,811	17,811
Unemployment	4,142	842	16,978	38,551	38,551	38,551
Oregon Paid Leave	12,608	14,492	14,800	15,318	15,318	15,318
Health Insurance	649,447	609,666	599,627	612,571	612,571	612,571
Life Insurance	840	7,591	1,063	6,035	6,035	6,035
TSA - ER Paid	45,800	50,800	41,800	38,600	38,600	38,600
Long Term Disability	7,830	3,668	5,323	5,635	5,635	5,635
FSA/HSA	42,479	19,400	23,400	25,400	25,400	25,400
TSA Classified ER Paid Health Insurance Option Health	32,701	30,709	7,203	7,203	7,203	7,203
BENEFITS	1,780,210	1,924,073	1,967,606	2,052,693	2,052,693	2,052,693
Repair/Maintenance	87,220	57,551	75,000	75,000	75,000	75,000
Rental Expense	6,840	-	-	-	-	-
Travel - In District	-	68	-	-	-	-
PURCHASED SERVICES	94,060	57,619	75,000	75,000	75,000	75,000
Supplies and Materials	267,785	274,943	299,000	299,500	299,500	299,500
Non-Consumables	10,228	19,500	25,000	25,000	25,000	25,000
SUPPLIES	278,012	294,443	324,000	324,500	324,500	324,500
Equipment - New	7,686	32,372	-	-	-	-
Equipment - Replacement	22,169	16,932	15,000	15,000	15,000	15,000
CAPITAL OUTLAY	29,854	49,304	15,000	15,000	15,000	15,000
Dues/Fees/Memberships	112	13	10,800	-	-	-
OTHER OBJECTS	112	13	10,800	-	-	-
CUSTODIAL	5,372,082	5,948,284	6,159,422	6,367,913	6,367,913	6,367,913



Function 2542 includes services, supplies, equipment, materials, utilities, and staff used to clean and operate all schools, auxiliary buildings, and grounds. Spending for FY26-27 is \$6.3M, an increase of \$0.2M, or 3.4% to the prior year. Staffing for FY26-27 across all funds is 68.7 FTE, which is - 2.0 FTE less than the prior year. Staffing cuts were realized through the elimination of vacant positions.

Notes Page

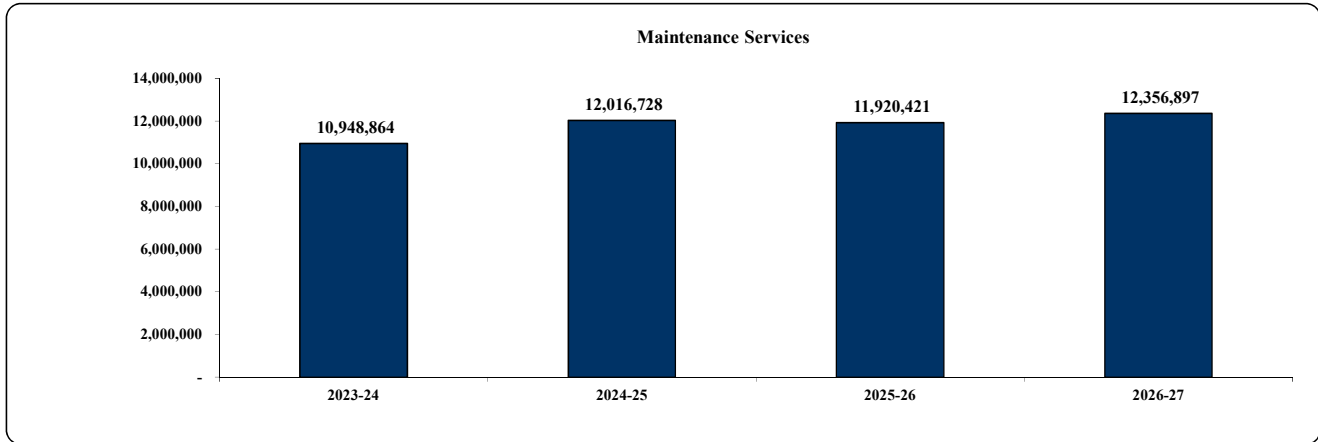


General Fund Detail Budget - 2544 Maintenance Services

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	271	-	-	-	-	-
Classified	1,815,447	1,917,381	1,997,147	2,047,733	2,047,733	
Classified Managers	294,777	358,046	141,810	147,786	147,786	
Licensed Temporary	328	-	-	-	-	-
Classified Temporary	124,462	194,826	201,452	201,452	201,452	
Additional Salary	-	3,000	-	-	-	-
Classified Overtime	121,768	134,540	67,149	67,149	67,149	
Insurance Opt Out	5,091	12,524	9,600	9,600	9,600	
SALARIES & WAGES	2,362,144	2,620,317	2,417,158	2,473,720	2,473,720	
PERS	585,785	609,705	659,765	676,375	676,375	
Social Security	139,329	155,916	149,269	152,775	152,775	
Medicare	32,585	36,456	34,910	35,730	35,730	
Workers Compensation	8,145	14,467	11,123	11,384	11,384	
Unemployment	2,905	601	9,999	24,641	24,641	
Oregon Paid Leave	9,134	10,313	8,556	8,782	8,782	
Health Insurance	427,893	454,057	421,627	432,132	432,132	
Life Insurance	477	4,695	469	5,428	5,428	
TSA - ER Paid	26,436	30,393	20,200	18,600	18,600	
Long Term Disability	4,384	2,188	3,328	3,517	3,517	
FSA/HSA	18,663	12,200	10,200	10,200	10,200	
TSA Classified ER Paid Health Insurance Option	14,665	17,416	-	-	-	
BENEFITS	1,270,402	1,348,407	1,329,445	1,379,564	1,379,564	
Professional Growth	15,061	21,957	10,500	10,500	10,500	
Repair/Maintenance/Rentals	1,451,876	2,195,895	1,979,508	2,200,500	2,200,500	
Rental Expense	210,471	49,349	275,000	50,000	50,000	
Electricity	1,707,008	1,914,169	2,063,000	2,163,000	2,163,000	
Natural Gas	445,377	439,118	467,000	490,350	490,350	
Water/Sewage	633,525	690,818	784,280	859,280	859,280	
Garbage	297,390	274,684	316,200	325,686	325,686	
Travel - In District	650	1,122	2,500	2,500	2,500	
Travel - Out of District	20,022	11,672	3,000	3,000	3,000	
Postage	1,495	-	-	-	-	
Advertising	8,207	138	-	-	-	
Architects/Engineers Services	75,887	29,750	80,000	60,000	60,000	
Other Licensed Subs	86	-	-	-	-	
Other Classified Subs	1,100	-	-	-	-	
PURCHASED SERVICES	4,868,154	5,628,673	5,980,988	6,164,816	6,164,816	
Supplies and Materials	812,189	917,912	650,000	650,000	650,000	
Non-Consumables	334,777	250,305	249,000	235,000	235,000	
Software	7,956	53,318	77,000	78,000	78,000	
SUPPLIES	1,154,922	1,221,535	976,000	963,000	963,000	
Equipment - New	82,943	111,464	210,000	200,000	200,000	
Equipment - Replacement	41,299	162,713	150,000	150,000	150,000	
CAPITAL OUTLAY	124,242	274,177	360,000	350,000	350,000	
Principal - SBITA	-	8,299	-	-	-	
Principal - Leases	529,076	247,516	-	-	-	
Interest - Lease	2,090	2,484	-	-	-	
Dues/Fees/Memberships	22,978	18,823	27,000	30,000	30,000	
Liability Insurance	103	-	-	-	-	
Property Insurance Premium	614,752	646,497	829,831	995,797	995,797	
OTHER OBJECTS	1,169,000	923,619	856,831	1,025,797	1,025,797	
MAINTENANCE SERVICES	10,948,864	12,016,728	11,920,421	12,356,897	12,356,897	

General Fund Detail Budget - 2544 Maintenance Services

2544 Maintenance Services Continued

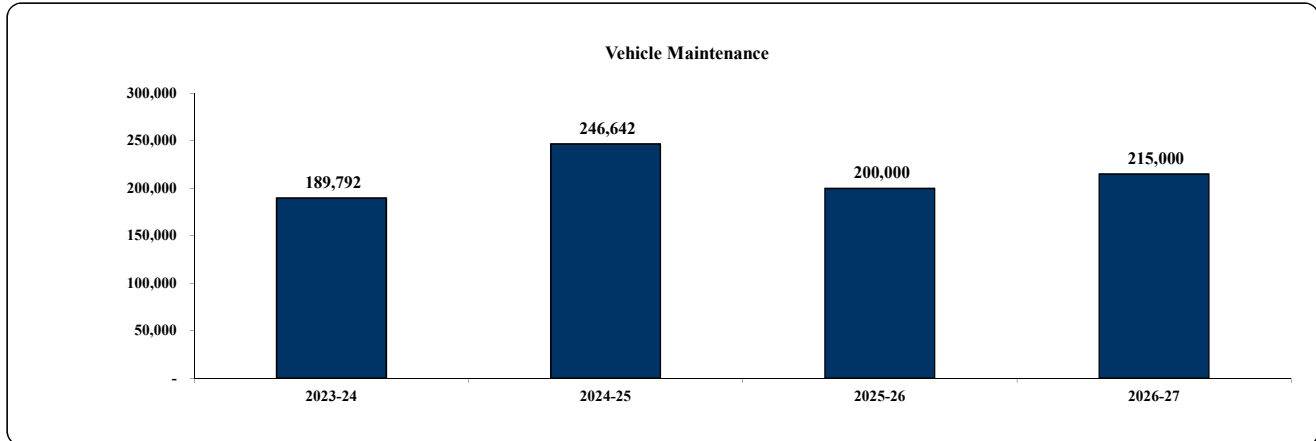


Function 2544 includes services, supplies, equipment, utilities, materials, and staff necessary to maintain and repair all District schools, auxiliary buildings, and grounds across 23 sites with 1.95 M square feet of facility space and over 279 acres of grounds. Spending in the FY26-27 budget is \$12.3M, \$0.43M (3.6%) higher than the FY25-26 Budget. This is mainly due to an increase in utilities, insurance premiums, and increased supplies prices. Rental Expense includes rentals of lifts, tractors, and porta potties. There is a reduction in Rental Expense due to the move of district staff to the Oakdale Middle School building, and there no longer being the lease for the Biddle property. Water and sewer rates are expected to increase 10%, electricity is expected to increase 5%, and garbage 3%. See pp. 115-119 for more information about capital projects.

Staffing for FY26-27 is 31 FTE, which is -1.0 FTE less than the current budget due to the elimination of a vacant position. This is due to a resignation in a position that will not be refilled.

General Fund Detail Budget - 2545 Vehicle Maintenance

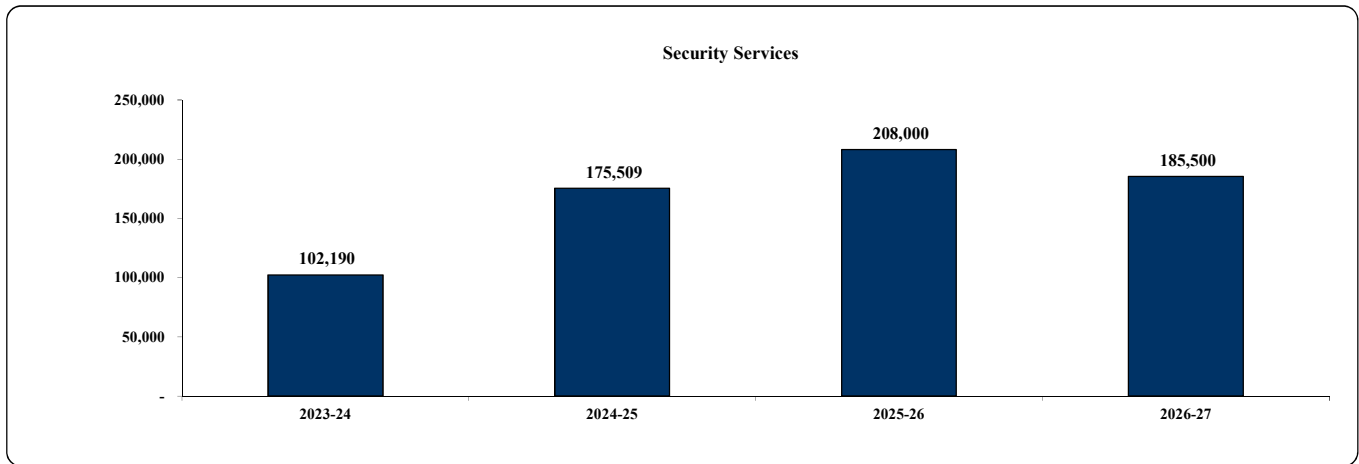
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Repair/Maintenance	91,124	121,306	100,000	100,000	100,000	
Travel - In District	440	-	-	-	-	
PURCHASED SERVICES	91,564	121,306	100,000	100,000	100,000	
Supplies and Materials	97,810	89,185	100,000	115,000	115,000	
SUPPLIES	98,229	89,185	100,000	115,000	115,000	
Equipment - New	-	36,151	-	-	-	
CAPITAL OUTLAY	-	36,151	-	-	-	
VEHICLE MAINTENANCE	189,792	246,642	200,000	215,000	215,000	



Function 2545 includes services, supplies, and equipment needed to maintain all District owned vehicles. The FY26-27 budgeted spending is higher than the prior year due to increases in fuel prices and associated maintenance and repair items.

General Fund Detail Budget - 2546 Security Services

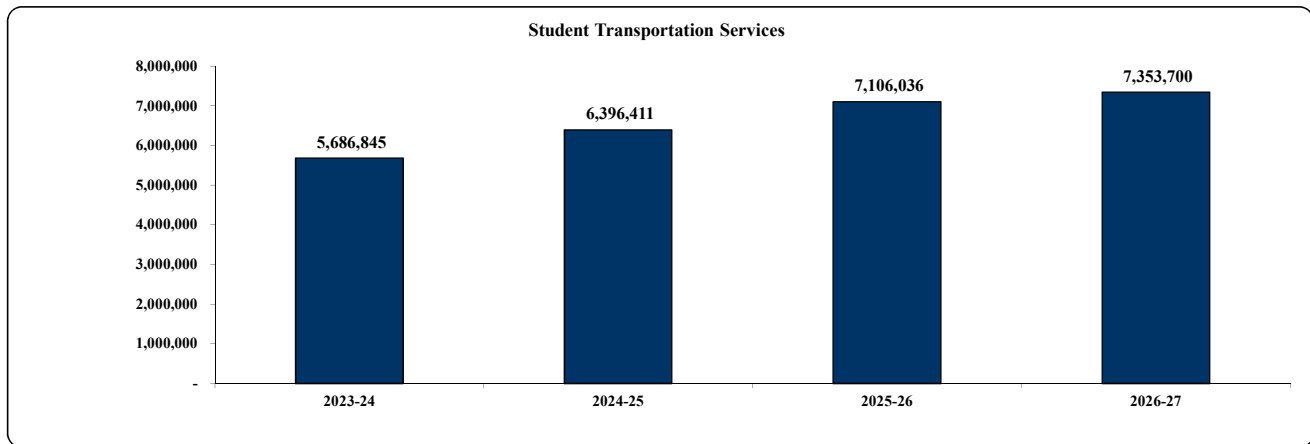
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Professional Growth	-	5,044	-	-	-	-
Repair/Maintenance	79,278	90,739	137,000	120,000	120,000	
Other Property Services	22,368	22,876	70,000	35,000	35,000	
Professional Services	544	544	1,000	500	500	
PURCHASED SERVICES	102,190	124,475	208,000	155,500	155,500	
Supplies and Materials	-	36,250	-	20,000	20,000	
Non-Consumables	-	4,179	-	10,000	10,000	
Software	-	10,605	-	-	-	
SUPPLIES	-	51,034	-	30,000	30,000	
SECURITY SERVICES	102,190	175,509	208,000	185,500	185,500	



Function 2546 includes a service contract with Sonitrol to provide security and safety for all District property, as well as repairs and maintenance expense for fire alarm certification. This function covers ongoing safety and security expenses.

General Fund Detail Budget - 2550 Student Transportation Services

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Classified		26,989	-	-	-	-
Classified Overtime		216	-	-	-	-
Insurance Opt Out		3,670	-	-	-	-
SALARIES & WAGES	-	30,875	-	-	-	-
PERS Tiers I & II	-	10,189	-	-	-	-
Social Security	-	2,376	-	-	-	-
Medicare	-	556	-	-	-	-
Workers Compensation	-	283	-	-	-	-
Unemployment	-	9	-	-	-	-
Oregon Paid Leave	-	153	-	-	-	-
Life Insurance	-	99	-	-	-	-
403B Employer Contributions	-	600	-	-	-	-
BENEFITS	-	14,265	-	-	-	-
Pupil Transportation	5,652,612	6,275,744	7,030,000	7,276,050	7,276,050	
Pupil Transportation - O.T.H.T.S.	34,168	71,658	75,025	77,650	77,650	
Travel - In District	-	-	11	-	-	-
Travel - Out of District	65	-	-	-	-	-
PURCHASED SERVICES	5,686,845	6,347,402	7,105,036	7,353,700	7,353,700	
Supplies and Materials		3,870	1,000	-	-	-
SUPPLIES	-	3,870	1,000	-	-	-
STUDENT TRANSPORTATION SVC	5,686,845	6,396,411	7,106,036	7,353,700	7,353,700	

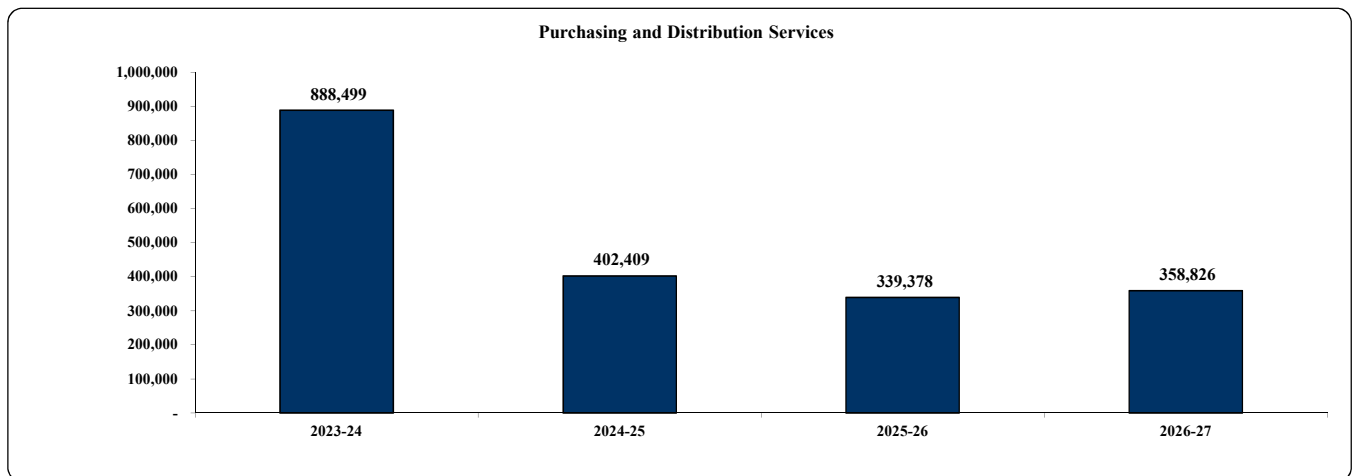


Function 2550 includes a service agreement with First Student to provide all home-to-school transportation activity, as well as non-charter athletic transportation services. This is the gross expense for the District. The state revenue allocation includes a 70% transportation grant reimbursement for home-to-school transportation activity, as well as curriculum related travel. The FY26-27 Budget of \$7.3M is up \$0.25M (3.5%) due to the expectation that bussing will resume close to the prior year. The Safe Routes to School position was eliminated in FY25-26.

Note: O.T.H.T.S = Other Than Home To School

General Fund Detail Budget - 2572 Purchasing and Distribution Service

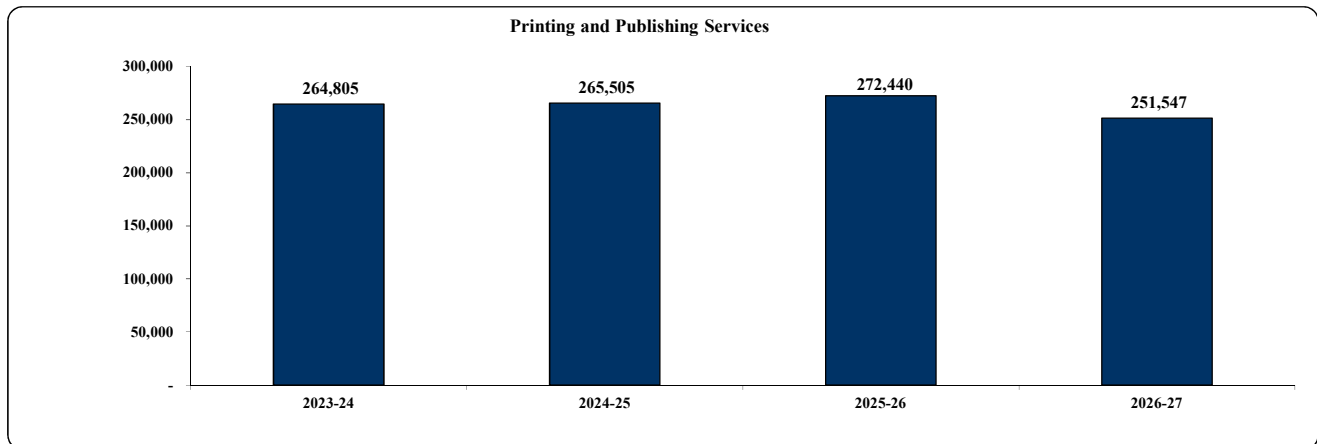
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Classified	224,917	225,820	200,102	206,783	206,783	
Classified Managers	420	212	420	-	-	
Classified Overtime	3,972	5,661	3,500	3,500	3,500	
Insurance Opt Out	-	3,020	-	2,400	2,400	
SALARIES & WAGES	229,308	233,429	204,022	212,683	212,683	
PERS	65,543	54,554	62,137	60,008	60,008	
Social Security	13,676	14,201	13,799	13,133	13,133	
Medicare	3,199	3,321	3,227	3,072	3,072	
Workers Compensation	774	1,058	1,028	979	979	
Unemployment	263	54	1,038	2,118	2,118	
Oregon Paid Leave	917	934	870	827	827	
Health Insurance	30,145	20,623	32,391	44,893	44,893	
Life Insurance	40	380	41	41	41	
TSA - ER Paid	1,800	3,200	2,600	1,800	1,800	
Long Term Disability	329	161	479	128	128	
FSA/HSA	-	-	1,800	2,000	2,000	
TSA Classified ER Paid Health Insurance Option	1,800	1,188	-	-	-	
BENEFITS	118,485	99,675	119,411	128,999	128,999	
Professional Growth	21	-	4,000	4,000	4,000	
Repair/Maintenance/Rentals	2,103	3,142	4,000	5,000	5,000	
Rental Expense	429,201	(3,349)	-	-	-	
Travel - Out of District	13,016	-	-	-	-	
Advertising	2,512	2,585	800	1,000	1,000	
Other Classified Subs	-	-	1,545	1,545	1,545	
PURCHASED SERVICES	446,853	2,429	10,345	11,545	11,545	
Supplies and Materials	12,108	54,816	2,000	2,000	2,000	
Non-Consumables	349	1,601	-	-	-	
SUPPLIES	12,458	56,417	2,000	2,000	2,000	
Equipment - New	-	10,459	-	-	-	
Warehouse Inventory Purchase	6,845	-	-	-	-	
CAPITAL OUTLAY	6,845	10,459	-	-	-	
Principal - Leases	71,557	-	-	-	-	
Interest - Lease	2,325	-	-	-	-	
Dues/Fees/Memberships	334	-	3,600	3,600	3,600	
OTHER OBJECTS	74,216	-	3,600	3,600	3,600	
PURCHASING/DISTRIBUTION SERVICES	888,499	402,409	339,378	358,826	358,826	



Function 2572 includes expenditures for services, supplies, staff, storage, delivery, and equipment necessary to purchase, receive, control, and distribute District goods. There is a reduction in this function due to the move of rental expense (copiers and toner) to function 2669 (p. 98). The FY26-27 Budget includes spending of \$0.36M. Staffing is 3 FTE, which is flat to the prior year.

General Fund Detail Budget - 2574 Printing and Publishing Services

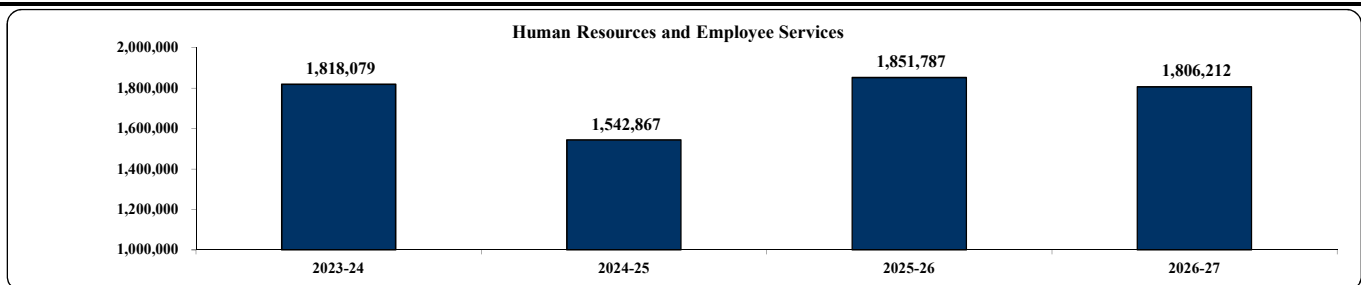
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	1,500	-	-	-	-	-
Classified	89,793	91,396	100,241	59,391	59,391	59,391
Classified Temporary	-	-	4,246	4,246	4,246	4,246
Classified Overtime	3,925	2,745	5,832	5,832	5,832	5,832
Insurance Opt Out	500	-	-	2,400	2,400	2,400
SALARIES & WAGES	95,718	94,142	110,319	71,869	71,869	71,869
PERS	25,843	25,092	28,614	18,268	18,268	18,268
Social Security	5,685	5,525	6,840	4,307	4,307	4,307
Medicare	1,329	1,292	1,600	1,007	1,007	1,007
Workers Compensation	339	573	510	321	321	321
Unemployment	128	22	515	695	695	695
Oregon Paid Leave	383	377	401	238	238	238
Health Insurance	40,061	35,958	25,469	7,396	7,396	7,396
Life Insurance	28	208	28	14	14	14
TSA - ER Paid	1,200	1,200	375	(400)	(400)	(400)
Long Term Disability	241	105	221	233	233	233
FSA/HSA/HC Opt Out	1,890	1,200	600	600	600	600
TSA Classified ER Paid Health Insurance Option Health	1,659	1,310	-	-	-	-
BENEFITS	78,786	72,861	65,171	32,678	32,678	32,678
Repair/Maintenance	-	-	10,000	10,000	10,000	10,000
Rental Expense	-	660	15,000	15,000	15,000	15,000
Postage	41	-	-	-	-	-
Printing	-	-	5,000	55,000	55,000	55,000
PURCHASED SERVICES	41	660	30,000	80,000	80,000	80,000
Supplies and Materials	80,776	97,818	66,950	67,000	67,000	67,000
Non-Consumables	9,484	24	-	-	-	-
SUPPLIES	90,260	97,842	66,950	67,000	67,000	67,000
PRINTING/PUBLISHING SERVICES	264,805	265,505	272,440	251,547	251,547	251,547



Function 2574 includes supplies, equipment, and staff used to print and publish District reports and instructional materials. Expenditures for FY26-27 are expected to be \$0.25M, which is slightly lower than the FY25-26 Budget. Staffing for FY26-27 is 1.0 FTE, which is a reduction of -1.0 FTE to the current year. This is due to a resignation for a position that will not be refilled.

General Fund Detail Budget - 2640 Human Resources and Employee Services

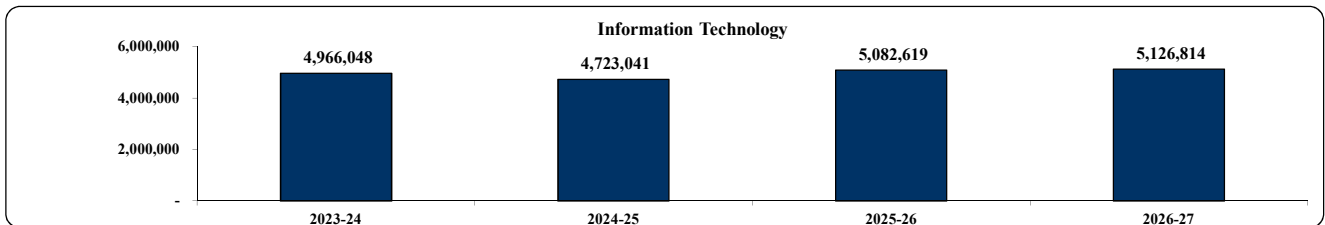
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Classified	478,355	400,130	459,051	538,058	538,058	
Administrators Salaries	457,060	315,105	303,289	340,865	340,865	
Manager Salaries	121,511	197,164	144,672	101,449	101,449	
Overtime Classified	21	-	-	-	-	
Insurance Opt Out	2,375	4,548	4,800	2,400	2,400	
SALARIES & WAGES	1,059,321	914,187	911,812	982,772	982,772	
PERS	292,289	239,642	223,720	254,573	254,573	
Social Security	64,297	55,429	51,275	60,783	60,783	
Medicare	15,037	12,963	11,992	14,215	14,215	
Workers Compensation	3,366	3,667	3,821	4,529	4,529	
Unemployment	1,268	217	2,934	9,804	9,804	
Oregon Paid Leave	4,117	3,653	3,291	3,905	3,905	
Health Insurance	136,497	108,868	100,385	129,811	129,811	
Life Insurance	288	1,901	110	124	124	
TSA - Employer Paid	15,286	8,151	10,705	6,600	6,600	
Long Term Disability	1,215	708	1,092	1,647	1,647	
FSA/HSA	4,293	3,000	4,600	10,200	10,200	
TSA Classified ER Paid Health Insurance Option	10,269	8,148	2,400	-	-	
BENEFITS	548,223	446,348	416,325	496,190	496,190	
Management Services	60,150	56,714	80,000	70,000	70,000	
Professional Growth	-	6,117	10,500	10,500	10,500	
Prof/Tech Svcs-Instr'l	-	-	-	-	-	
Travel - In District	125	-	250	250	250	
Travel - Out of District	23,448	3,701	17,500	17,500	17,500	
Postage	-	42	-	-	-	
Advertising	-	925	3,000	3,000	3,000	
Printing	-	-	-	-	-	
Tuition	-	-	-	-	-	
Legal	9,223	21,443	25,000	25,000	25,000	
Negotiations	59,604	24	45,000	45,000	45,000	
Professional Services	9,510	47,178	290,000	90,000	90,000	
Other Classified Subs	-	123	-	-	-	
PURCHASED SERVICES	162,060	136,266	471,250	261,250	261,250	
Supplies and Materials	11,271	7,517	20,400	20,000	20,000	
Software	32,677	34,582	28,000	40,000	40,000	
SUPPLIES	43,947	42,099	48,400	60,000	60,000	
Dues/Fees/Memberships	4,529	3,968	4,000	6,000	6,000	
OTHER OBJECTS	4,529	3,968	4,000	6,000	6,000	
HUMAN RESOURCES/EMPLOYEE SERVICES	1,818,079	1,542,867	1,851,787	1,806,212	1,806,212	



Function 2640 is for the direction and management of all personnel and employee services. This includes services, supplies, advertising, software, and staff necessary for the recruitment, monitoring, placement, and pay assignment of all employees. It also includes bargaining, administrative assistance, and contract management. Professional services includes contractual work from outside agencies for employee and volunteer background checks, employee drug screens and consultant fees to assist with some investigations. This object has a decrease of \$200K due to the non-renewal of VIDA and Vitality, a prior benefit offered to employees. Software includes: Perform, Records, Recruit and Hire and Frontline Education. \$25K is budgeted in Legal for the Hungerford Law Firm and Garrett Hemann Robertson for addressing employee relations issues. The FY26-27 Budget of \$1.81M is - \$0.05M lower than the prior year primarily driven by the previously noted decrease in professional services partially offset by COLA and STEP wage increases and increases in the associated payroll costs on those increases. The FY25-26 year included some vacancy savings in staffing for partial year vacancies in 2025-26. Staffing across all funds for FY26-27 is 9 FTE, which is flat to the prior year.

General Fund Detail Budget - 2661 Information Technology

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	5,521	(3,571)	-	-	-	-
Classified	1,684,536	1,807,446	1,902,553	1,937,606	1,937,606	
Classified Managers	768,368	758,637	715,957	730,247	730,247	
Classified Temporary	-	-	23,871	23,871	23,871	
Additional Salary	-	4,500	-	-	-	
Classified Overtime	126,021	106,705	89,585	89,585	89,585	
Insurance Opt Out	11,939	23,182	14,400	12,000	12,000	
SALARIES & WAGES	2,596,385	2,696,900	2,746,367	2,793,309	2,793,309	
PERS	684,653	690,297	711,061	710,208	710,208	
Social Security	156,279	162,005	169,382	172,441	172,441	
Medicare	36,549	37,970	39,614	40,329	40,329	
Workers Compensation	8,630	12,546	12,622	12,850	12,850	
Unemployment	3,200	628	12,744	27,813	27,813	
Oregon Paid Leave	10,333	10,788	10,474	10,671	10,671	
Health Insurance	487,592	479,448	457,505	424,037	424,037	
Life Insurance	451	5,253	455	428	428	
TSA - ER Paid	28,087	22,284	12,660	17,600	17,600	
Long Term Disability	931	1,427	3,750	3,383	3,383	
FSA/HSA	18,093	13,800	15,800	12,000	12,000	
TSA Classified ER Paid Health Insurance Option	22,824	23,618	5,285	-	-	
BENEFITS	1,457,622	1,460,064	1,451,352	1,431,760	1,431,760	
Professional Growth	26,905	-	-	-	-	
Professional Instr. Services	10,417	7,273	10,000	10,000	10,000	
Rental Expense	-	2,614	-	-	-	
Travel - In District	229	588	1,500	500	500	
Travel - Out of District	40,205	42,629	22,500	15,000	15,000	
Training-In District	-	-	-	20,000	20,000	
Postage	69	-	-	-	-	
Tuition	-	-	1,000	2,000	2,000	
Professional Services	(630)	-	5,000	5,000	5,000	
Other Licensed Subs	645	-	-	-	-	
PURCHASED SERVICES	77,841	53,104	40,000	52,500	52,500	
Supplies and Materials	17,192	3,271	7,400	2,000	2,000	
Non-Consumables	1,482	951	-	-	-	
Software	339,816	67,867	834,500	844,245	844,245	
Hardware Under \$5000	287	150	-	-	-	
SUPPLIES	358,778	72,239	841,900	846,245	846,245	
Principal - SBITA	466,720	408,669	-	-	-	
Interest - SBITA	5,679	29,055	-	-	-	
Dues/Fees/Memberships	3,024	3,011	3,000	3,000	3,000	
OTHER OBJECTS	475,423	440,735	3,000	3,000	3,000	
INFORMATION TECHNOLOGY	4,966,048	4,723,041	5,082,619	5,126,814	5,126,814	



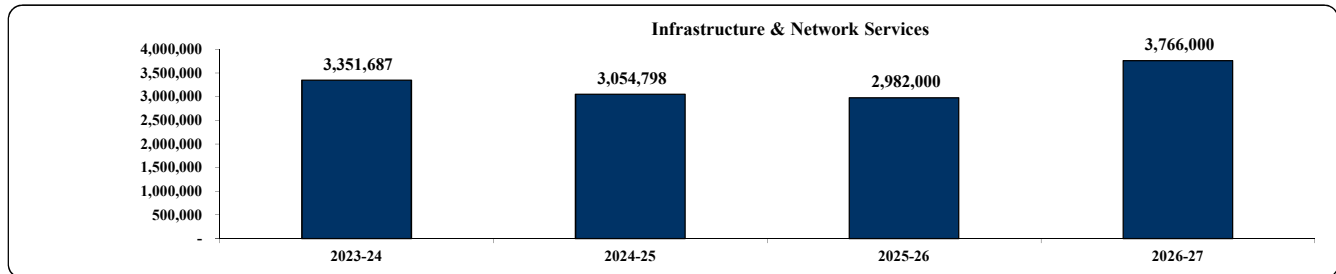
Function 2661 includes costs associated with ongoing computer applications and data services for MSD. Several software solutions for the District's financial, accounting, human resources, student information, and Oregon Department of Education reporting needs are maintained by this department. The primary driver of costs incurred for this area are annual software maintenance expenses for the core software applications of the District. The District also contracts out for mailing services, special forms, confidential document destruction, and other external services managed by this department.

This function is responsible for selecting, implementing, and maintaining various software applications including but not limited to: Synergy Student System, Blackboard messaging, PowerSchool Business Plus ERP, and UKG Timekeeping. A combination of IT and NTS is on pp. 97-99.

FY26-27 spending of \$5.1M is roughly flat to the prior year. Staffing across all funds is 31 FTE, which is -2.0 FTE less than the prior year. This is due to the elimination of two vacant positions.

General Fund Detail Budget - 2669 IT - Infrastructure & Network Services

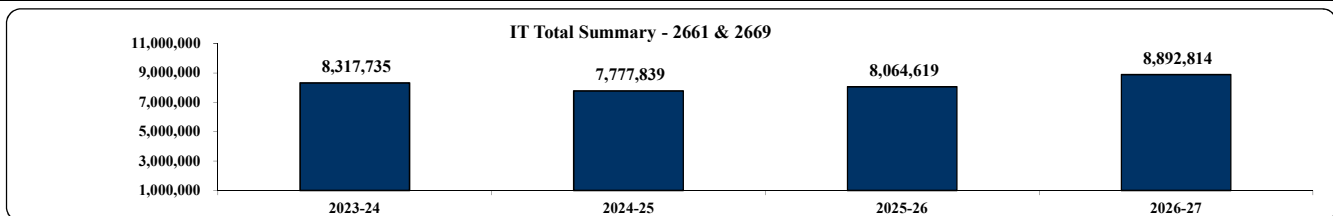
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Long Term Disability	2,878	721	-	-	-	-
BENEFITS	2,878	721	-	-	-	-
Professional Growth	4,977	406	-	-	-	-
Cleaning Services	951	11,452	-	-	-	-
Repair/Maintenance/Rentals	23,071	87,998	100,000	100,000	100,000	100,000
Rental Expense	-	451,298	590,000	600,000	600,000	600,000
Travel - In District	1,615	2,110	-	-	-	-
Travel - Out of District	182	7,568	-	-	-	-
Telephone	376,619	361,460	350,000	360,000	360,000	360,000
Advertising	298	80	-	-	-	-
Tuition	3,670	980	1,000	1,000	1,000	1,000
Audit	-	951	-	-	-	-
Pro Services - Tech / Non-Instructional	213,168	279,192	210,000	210,000	210,000	210,000
PURCHASED SERVICES	624,552	1,203,496	1,251,000	1,271,000	1,271,000	1,271,000
Supplies and Materials	1,147	1,672	1,000	-	-	-
Non-Consumables	324,595	185,721	350,000	450,000	450,000	450,000
Software	749,023	290,880	530,000	1,100,000	1,100,000	1,100,000
Hardware	1,257,823	837,482	850,000	935,000	935,000	935,000
SUPPLIES	2,332,587	1,315,755	1,731,000	2,485,000	2,485,000	2,485,000
Principal - SBITA	388,847	442,399	-	-	-	-
Principal - SBITA	-	76,027	-	-	-	-
Interest - SBITA	2,446	7,403	-	-	-	-
Interest - Lease	-	3,804	-	-	-	-
Dues/Fees/Memberships	377	5,193	-	10,000	10,000	10,000
OTHER OBJECTS	391,670	534,826	-	10,000	10,000	10,000
INFRASTRUCTURE & NETWORK SERVICES	3,351,687	3,054,798	2,982,000	3,766,000	3,766,000	3,766,000



Function 2669 includes services, supplies, equipment, software, and staff necessary to design, install, and maintain District network, telecommunication, and security systems. The increase in software is due to the 3 year renewal for the Cybersecurity Incident 24/7 Response Service. Software includes: Adobe and Microsoft licensing, Active Directory Management, software for "password management," the phone system, security firewall, and many other services that are used to keep every school, as well as the District office, up and running technologically. The \$210K in Professional Services is for contracted work for new cameras and additional network wiring.

General Fund Detail Budget - IT Total Summary (2661 and 2669)

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Licensed	5,521	(3,571)	-	-	-	-
Classified	1,684,536	1,807,446	1,902,553	1,937,606	1,937,606	
Classified Managers	768,368	758,637	715,957	730,247	730,247	
Classified Temps/Overtime	-	-	23,871	23,871	23,871	
Additional Salary	-	4,500	-	-	-	
Classified Overtime	126,021	106,705	89,585	89,585	89,585	
Insurance Opt Out	11,939	23,182	14,400	12,000	12,000	
SALARIES & WAGES	2,596,385	2,696,900	2,746,367	2,793,309	2,793,309	
PERS	684,653	690,297	711,061	710,208	710,208	
Social Security	156,279	162,005	169,382	172,441	172,441	
Medicare	36,549	37,970	39,614	40,329	40,329	
Workers Compensation	8,630	12,546	12,622	12,850	12,850	
Unemployment	3,200	628	12,744	27,813	27,813	
Oregon Paid Leave	10,333	10,788	10,474	10,671	10,671	
Health Insurance	487,592	479,448	457,505	424,037	424,037	
Life Insurance	451	5,253	455	428	428	
TSA - ER Paid	28,087	22,284	12,660	17,600	17,600	
Long Term Disability	3,809	2,148	3,750	3,383	3,383	
FSA/HSA	18,093	13,800	15,800	12,000	12,000	
TSA Classified ER Paid Health Insurance Option	22,824	23,618	5,285	-	-	
BENEFITS	1,460,500	1,460,785	1,451,352	1,431,760	1,431,760	
Professional Growth	31,882	406	-	-	-	-
Professional Instr. Services	10,417	7,273	10,000	10,000	10,000	-
Cleaning Services	951	11,452	-	-	-	-
Repair/Maintenance/Rentals	23,071	87,998	100,000	100,000	100,000	-
Rental Expense	-	453,913	590,000	600,000	600,000	-
Travel - In District	1,844	2,698	1,500	500	500	-
Travel - Out of District	40,387	50,197	22,500	15,000	15,000	-
Telephone	376,619	361,460	350,000	360,000	360,000	-
Advertising	298	80	-	-	-	-
Tuition	3,670	980	2,000	3,000	3,000	-
Audit	-	951	-	-	-	-
Pro Services - Tech / Non-instructional	212,538	279,192	215,000	215,000	215,000	-
Other Licensed Subs	645	-	-	-	-	-
PURCHASED SERVICES	702,392	1,256,599	1,291,000	1,323,500	1,323,500	-
Supplies and Materials	18,339	4,943	8,400	2,000	2,000	
Non-Consumables	326,077	186,671	350,000	450,000	450,000	
Software	1,088,839	358,747	1,364,500	1,944,245	1,944,245	
Hardware	1,258,110	837,632	850,000	935,000	935,000	
SUPPLIES	2,691,365	1,387,994	2,572,900	3,331,245	3,331,245	
Principal - SBITA	855,567	851,067	-	-	-	
Principal - SBITA	-	76,027	-	-	-	
Interest - SBITA	8,124	36,458	-	-	-	
Interest - Lease	-	3,804	-	-	-	
Dues/Fees/Memberships	3,401	8,204	3,000	13,000	13,000	
OTHER OBJECTS	867,093	975,561	3,000	13,000	13,000	
IT TOTAL SUMMARY	8,317,735	7,777,839	8,064,619	8,892,814	8,892,814	



This page summarizes the spending in both 2661 and 2669 functions. Spending is higher due to higher hardware and software expenses. There are multiple year leases and Subscription Based Information Technology Agreements (SBITA) agreements being fully expensed beginning in 2023-24. IT and NTS are not two separate departments. Instead, there is one single department called IT with three divisions:

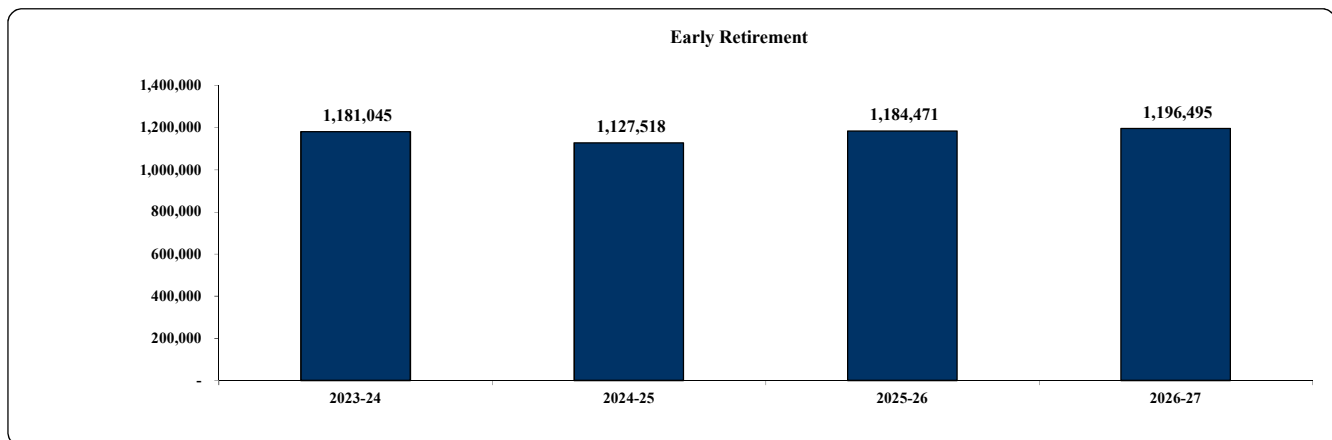
IT - Applications and Data Services

IT - Infrastructure and Network Services

IT - Helpdesk

General Fund Detail Budget - 2700 Early Retirement

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Early Retirement Stipends	539,000	500,000	621,484	638,400	638,400	
SALARIES & WAGES	539,000	500,000	621,484	638,400	638,400	
Social Security	32,079	29,435	56,631	39,581	39,581	
Medicare	7,664	6,884	13,244	9,257	9,257	
Workers Compensation	-	-	-	2,949	2,949	
Unemployment	1,199	113	-	-	-	
Oregon Paid Leave	2,052	1,872	-	-	-	
Post Retirement Healthcare	599,050	589,214	493,112	506,308	506,308	
BENEFITS	642,045	627,518	562,987	558,095	558,095	
EARLY RETIREMENT	1,181,045	1,127,518	1,184,471	1,196,495	1,196,495	



The Early Retirement function includes costs for one time stipends, district paid healthcare associated with the District supplemental early retirement program provided to qualified District retirees, and retired employee paid healthcare. These benefits are in addition to the state Public Employees Retirement System (PERS) benefits. Expenditures for FY26-27 are projected to be \$1.1M. Approximately \$0.64M, including fringe benefits, is budgeted for the one-time early retirement stipend program and \$0.5M for healthcare (see paragraph below for details). How much is spent in total in this function can vary higher or lower significantly based on the timing of when employees choose to retire.

The District paid early retirement healthcare benefit has been sunsetted for all employees who started after 2006. There are different levels of benefits depending on the bargaining group for those who started before 2006. The 2020-21 fiscal year was the last year for district paid retiree healthcare eligibility. For those who qualify for this benefit and retire in FY21-22 or later, there is a one-time stipend based on years of service at June 30, 2012. The maximum one-time stipend is \$56,000 per retiree. The amounts and terms vary by employee group and years of experience at June 30, 2012.

Per Oregon law, retirees may choose to buy healthcare services from the District at the average full cost of each plan offered until they become eligible for Medicare.

General Fund Expenditures- Community/Facilities/Debt & Transfer Functions

	2023-24	2024-25	2025-26	2026-27	2026-27	2026-27
COMMUNITY	Actual	Actual	Amended	Proposed	Approved	Adopted
School Lunch Match	-					
COMMUNITY SERVICES	-	-	-			
FACILITIES	2023-24	2024-25	2025-26	2026-27	2026-27	2026-27
	Actual	Actual	Amended	Proposed	Approved	Adopted
Acquisition & Construction	3,082,440	1,722,782	1,900,000	1,900,000	1,900,000	
Replacement Equipment	-	-				
Improvement	-					
FACILITIES	3,082,440	1,722,782	1,900,000	1,900,000	1,900,000	
DEBT & TRANSFERS	2023-24	2024-25	2025-26	2026-27	2026-27	2026-27
	Actual	Actual	Amended	Proposed	Approved	Adopted
Long Term Debt						
Transfer of Funds	10,360,000	11,498,650	11,948,000	8,488,000	8,488,000	
DEBT & TRANSFERS	10,360,000	11,498,650	11,948,000	8,488,000	8,488,000	

Total General Fund Transfers Out to Other Funds is down \$3.46M due to the reduction of the amount transferred to the project reserves fund (p. 115). The General Fund is budgeting to transfer a total of \$8.488M, which will be distributed as follows: \$5.178M to the Project Reserve Fund to fund Maintenance and Repairs, technology Hardware, and Curriculum (p. 19), \$0.575 to Special Revenue Secondary Athletics (p. 112), \$0.29M to partially fund the Physical Education Expansion (PEEK) (p. 111), \$0.025M for State and Local Programs (p. 109), \$1.25M for Chromebook Reserves fund (p. 121), and \$1.17M to Debt Service (p. 129). The detail of these transfers can be found in the green Special Revenue section starting on p. 105.

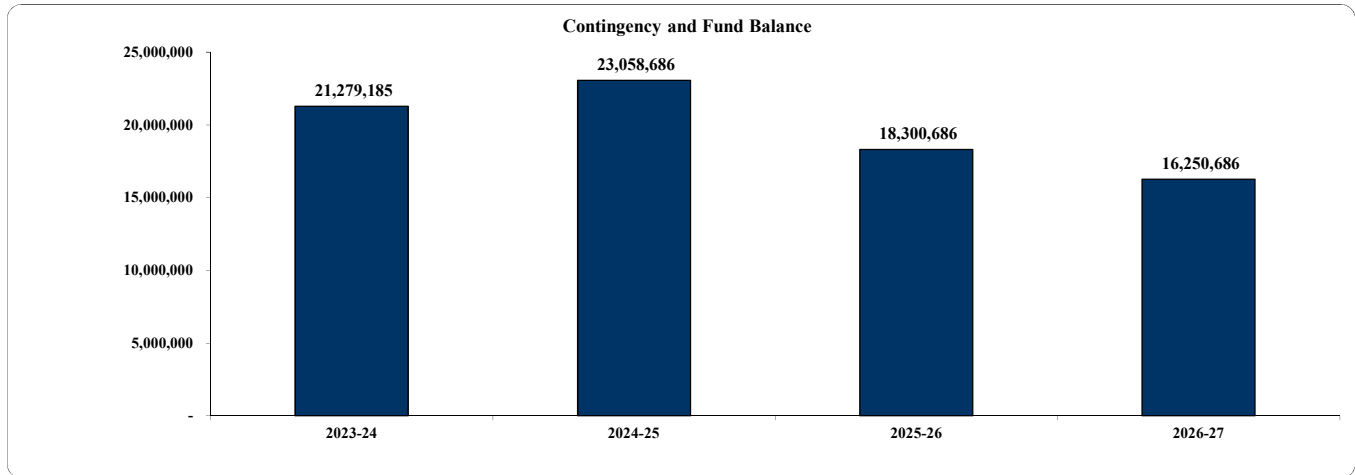
Notes Page



General Fund Expenditures - Contingency and Fund Balance Functions

	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Contingency	21,279,185	23,058,686	18,300,686	16,250,686	16,250,686	
CONTINGENCY	21,279,185	23,058,686	18,300,686	16,250,686	16,250,686	

	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
FUND BALANCE						
Unappropriated Balance						
FUND BALANCE						-



Contingency is dropping -\$2.05M or -11.2% due to deficit spending in prior years, as well as proposed deficit spending in FY26-27.

Special Revenue and Other Funds



Special Revenue Funds

Special Revenue funds account for the proceeds of specific revenue sources (other than trusts, debt service, or capital projects) that are legally restricted to expenditure for specified purposes.

Federal Programs

Other Federal, State & Local Programs

PERS Reserve

Physical Education Expansion (PEEK)

Secondary Athletics

Food Service Operations

Seismic Upgrades

Project Reserves

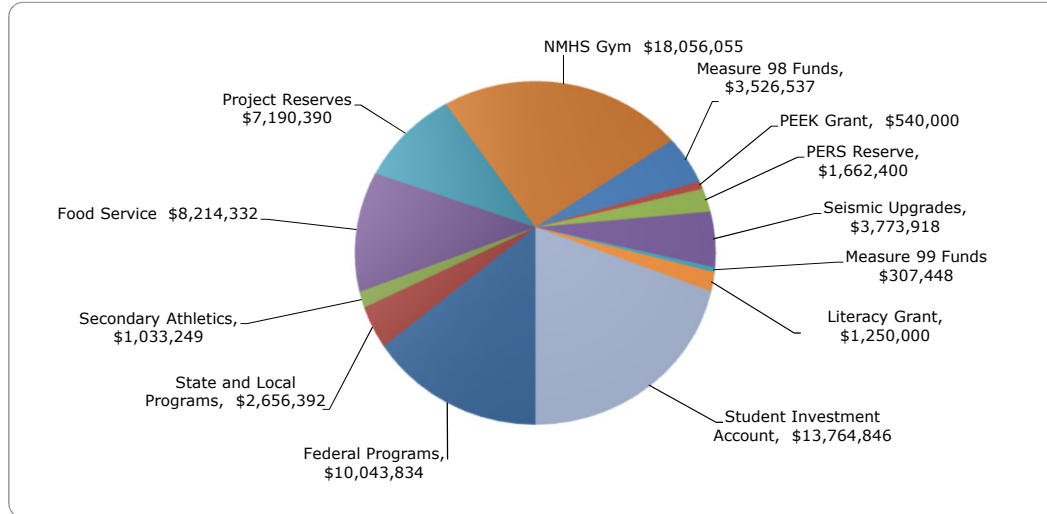
NMHS Gym Rebuild

Chromebook Reserve

MS 98 & MS99

Literacy Grant

Student Investment Account (SIA)

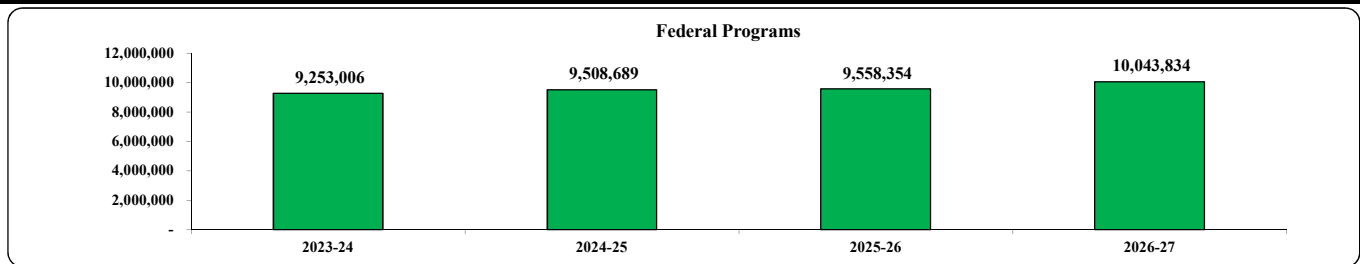


Requirements by Appropriation Level	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Instruction*	24,983,965	28,606,012	26,266,070	26,675,017	26,675,017	
Support Services*	13,084,230	7,688,915	8,436,393	7,826,763	7,826,763	
Community Services*	6,671,954	7,481,206	7,546,176	7,472,482	7,472,482	
Facilities Acquisition*	16,295,651	12,881,156	14,783,999	22,027,866	22,027,866	
Transfers*	550,000	550,000	550,000	550,000	550,000	
Contingency*	9,080,919	10,542,563	6,684,060	7,012,308	7,012,308	
Fund Balance/Unappropriated Fund Balance	357,515	452,826	436,537	454,963	454,963	
Total Expenditures/Appropriations	71,024,234	68,202,677	64,703,236	72,019,400	72,019,400	
*Appropriation Level						
Requirements by Program	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Federal Programs	9,253,006	9,508,689	9,558,354	10,043,834	10,043,834	-
Other Federal, State and Local Programs	1,578,415	2,373,989	2,972,409	2,656,392	2,656,392	-
PERS Reserve	3,312,400	2,762,400	2,212,400	1,662,400	1,662,400	-
Physical Education Expansion (PEEK)	540,000	516,999	540,000	540,000	540,000	-
Secondary Athletics (SECA)	1,001,498	1,037,757	994,749	1,033,249	1,033,249	-
Food Service Operations	8,031,436	8,074,326	8,190,031	8,214,332	8,214,332	-
Seismic Upgrades	3,004,431	5,331,548	2,500,000	-	-	-
Project Reserves	8,566,070	11,399,367	13,616,892	7,190,390	7,190,390	-
NMHS Gym Rebuild	-	582,486	2,746,241	18,056,055	18,056,055	-
Chromebook Reserve	5,045,157	1,298,376	2,523,918	3,773,918	3,773,918	-
Measure 98 - High School Success	3,714,797	3,475,458	3,388,242	3,526,537	3,526,537	-
Measure 99 Outdoor School	451,639	454,813	434,275	307,448	307,448	-
Literacy Grant	1,000,224	1,942,690	1,800,679	1,250,000	1,250,000	-
Student Investment Account (SIA)	13,693,802	14,608,369	13,225,048	13,764,846	13,764,846	-
ESSER Grants	11,831,359	4,835,409	-	-	-	-
Total Requirements by Fund	71,024,234	68,202,677	64,703,236	72,019,400	72,019,400	-

Special Revenue Resources/Appropriations are projected at \$72.0M for FY26-27, an increase of \$7.3M (11.3%) from the FY25-26 Budget, mainly due to increased NMHS Gym Rebuild activity partially offset by lower Project Reserves activity and smaller variances among the other grants. See the following pages for more details on each program or grant.

Special Revenue Funds - Federal Programs

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
RESOURCES By Grant Including Carryover						
Title I (A,C,D)	5,096,791	5,016,674	4,812,358	4,330,800	4,330,800	
IDEA	2,341,075	2,607,662	2,129,492	2,100,000	2,100,000	
ESSA	11,659	-	100,000	100,000	100,000	
Title IIA - Improving Teacher Quality	632,405	661,462	551,034	551,034	551,034	
PERKINS	140,888	147,148	165,000	165,000	165,000	
Other Federal Grants/Carryover	441,049	463,370	528,470	1,525,000	1,525,000	
Fruit and Vegetable Grants	61,485	70,466	185,000	185,000	185,000	
CLSD Literacy	-	-	575,000	575,000	575,000	
Title III - English Language Acquisition	157,530	107,246	132,000	132,000	132,000	
Title IV -	305,488	368,412	320,000	320,000	320,000	
McKinney Vento Homeless Education	64,636	66,249	60,000	60,000	60,000	
TOTAL RESOURCES	9,253,006	9,508,689	9,558,354	10,043,834	10,043,834	
REQUIREMENTS						
Instruction	7,311,252	7,719,094	7,759,411	8,153,521	8,153,521	
Support Services	1,840,464	1,659,717	1,668,386	1,753,125	1,753,125	
Community Services	88,780	98,402	98,916	103,940	103,940	
Facilities Acquisition	12,511	31,476	31,640	33,247	33,247	
Transfers						
TOTAL REQUIREMENTS	9,253,006	9,508,689	9,558,354	10,043,834	10,043,834	



Federal Program grant revenues are projected at \$10.0M in the FY26-27 Budget, which is \$0.48M (5.0%) higher than the FY25-26 Budget. Over 80% of the grant monies are awarded in two areas: IDEA and Title I. A description of the District's two major Federal Programs are described as follows:

IDEA - Under the Individuals with Disabilities Education Act (IDEA), federal Special Education funds are distributed by the state through three grant programs. Part B of the law, the main program, authorizes grants to state and local education agencies to offset part of the costs of the education needs of children with disabilities 5-21 years of age. The purpose of special education is to provide a Free Appropriate Public Education (FAPE) to eligible students at public expense, under public supervision and direction, at no cost to the parents, and in conformity with an Individualized Education Program (IEP). Special Education services include specially designed instruction, related services, and supplementary aides designed to meet the unique needs of a child with a disability. The District's December Special Education Child Count for 2020-21 was 2,117, 2,147 for 2021-22, 2,124 for 2022-23, 2,211 for 2023-24, 2,317 for 2024-25, and 2,382 for 2025-26.

The following Special Education services and programs are offered in MSD: (Note: This is not the same as the total child count above because some students can be in more than one of the programs below.)

<u>Program/Service</u>	<u>Students Served in FY25-26</u>	<u>Students Served in FY24-25</u>
Educational Resource Centers (provided at all schools)	1,466	1,627
Speech-Language Therapy	1,480	1,506
Assessment & Evaluation Teams	1069	1041
Self-contained Classes - MAPS and FOCUS programs at fifteen (15) schools	378	359
*Transitions School (for 18-21 year old students)	32	27
Occupational Therapy	183	203
**Program for Deaf and Hard of Hearing (operated by SOESD)	6	6
*** Classes (operated by SOESD)	19	18
Oregon School for the Deaf (OSD)	1	

*At Innovation Academy

**Crater High PDHH, Mae Richardson PDHH, Scenic Middle School PDHH

***Howard CARE, Crater High CARE, STEPS Plus (Operated by SOESD)

Students may be counted in more than one category.

Special Revenue Funds - Federal Programs

Federal Programs Narratives Continued

FEDERAL PROGRAMS IN THE ELEMENTARY AND SECONDARY EDUCATION ACT

Title I-A – Improving Basic Programs
 Title I-C- Migrant Education
 Title I-D – Neglected and Delinquent or At-Risk Children
 Title IIA – Teacher Quality
 Title III – English Learners and Immigrant Youth
 Title IV – Student Support and Academic Enrichment

Title I-A: Improving Basic Programs

The purpose of Title I-A funding is to ensure that all children have a fair and equitable opportunity to learn and achieve. Title I-A funding is a supplement to District and school resources to ensure our economically disadvantaged students receive a high quality education. It may not be used to supplant General Fund dollars.

The District funds are expended as authorized or required by federal and state law. Below is a narrative describing the purposes of the District set-aside funds and a brief summary of the planned expenditures:

Administration and Leadership. This set-aside supports District administration of the Title I-A program. This includes a portion of FTE of Federal Programs & School Improvement Executive Director, Systems Analyst II, Family Outreach Liaisons, and an Administrative Assistant. Additionally, Title I-A funds school administrators to support the MTSS process at Title I-A schools that do not meet the minimum enrollment requirements for an assistant principal.

Extended Time for Learning. Extra hours for contracted services to provide licensed teachers and classified staff to provide after-school programs at Title I-A schools.

Homeless. This required set-aside support services for homeless students in all District facilities. The District provides academic support to homeless students in non-Title I buildings from this required set aside. Expenditures include support of 5 family case workers through Maslow Project and 1.0 FTE for a District Foster Care & McKinney-Vento Liaison specialist. The District Foster Care & McKinney-Vento Liaison directly supports reengagement in school and attendance supports.

Parent Involvement. This is a required set-aside in the amount of 1% of the total allocation to implement effective Parent/Family Involvement. Each of the Title I-A schools receives a portion of the parent involvement funds based on a per-pupil amount.

Neglected Funds. This required set-aside provides licensed staff to provide quality education to students in the Bridges to Barriers program. This program is for students who meet the federally defined requirements of “neglected youth.”

Equitable Services for Private Schools. Private schools that opt-in for Title IA services receive a portion of this set-aside amount for professional development and direct interventions for reading and math instruction in the targeted assisted setting. This amount varies per year and is determined in the fall of each school year. Funding is dependent on enrollment numbers in each school that opts into services.

A portion of Title I funding is allocated directly to each qualifying Title I-A school. Schools are funded by a rank-order based on poverty and grade bands. The school funds are expended in accordance with the school-level Title I-A plan.

Title I-C – Migrant Education

Medford School District is part of the Southern Oregon Education District Consortia and does not receive money directly. These dollars are based on the number of students identified by the SOESD as migrant eligible. In order to qualify for services, children must have moved within the past three years, across state, or school district lines with or to join a migrant parent or guardian who is seeking to obtain qualifying temporary or seasonal employment in agriculture, fishing, or dairy. Title I-C funds provide support staff for migrant families across all schools, including parent engagement, registration for after school and summer school experiences, and translation and interpreting services. The Migrant Education Parent Advocacy Committee makes recommendations to that budget.

Title I-D: Neglected and Delinquent or At-Risk Youth

The purpose of Title-ID funds are to support educational services provided within the Juvenile Services center. These funds pay for a FTE licensed teacher to provide instruction in reading, math and English Language services (if needed) and classified support.

Additional funds, if available, are spent on providing student programs such as Career and Technical Education, training for staff in technology and career education, and online programs for career and transition readiness.

Special Revenue Funds - Federal Programs

Federal Title Programs Narratives Continued

Title II-A: Teacher Quality

Title II-A funds focused on providing leadership and instructional coaching in the school-wide implementation of the Medford School District Instructional Model. To this end, teacher quality is the focus of Title II-A funds. Curriculum supports K-12 are illustrated by providing mentoring support, a New Teacher Support, Teacher on Special Assignment, Teaching and Learning Facilitators at the district and middle school levels, and on-site professional development.

Equitable Services for Private Schools. Private schools that opt-in for Title II-A services receive a per pupil amount as set by Oregon Department of Education.

Title III: English Learners and Immigrant Youth

Title III funds ensure English learners, including immigrant children and youth, attain English proficiency and develop high levels of academic achievement in English. To this end, Title III supports newcomers to the district, including educational assistants, teachers, principals, and other school leaders in establishing, implementing and sustaining effective language education programs. In addition, Title III promotes parental, family and community participation in language instruction education programs.

English Language programs across the district are supported by a Teacher on Special Assignment to support students in English Language programs. In addition, 1.5 FTE, split between the two comprehensive high schools and blended with general fund, supports students in Newcomer programs by facilitating parent involvement and assisting with transitions into and out of high school.

Title IVA : Student Support and Academic Enrichment (SSAE)

The purpose of the SSAE grant program is to improve students' academic achievement by increasing the capacity of states, LEAs, schools, and local communities in three areas: providing a well-rounded education, improving school conditions for a healthy and safe school environment, and increasing technical and digital literacy of students.

MSD provides all students with access to a well-rounded education through district-wide programs. These include a MKV Transportation Coordinator and a lead Teaching and Learning Facilitator. To improve school conditions for students, a portion of the FTE of our Student Wellness Director oversees safe and healthy schools. This includes supports for physical education programs, student health and wellness policies and providing K-12 counseling programs. This position also engages with community partners to support the health and well-being of students.

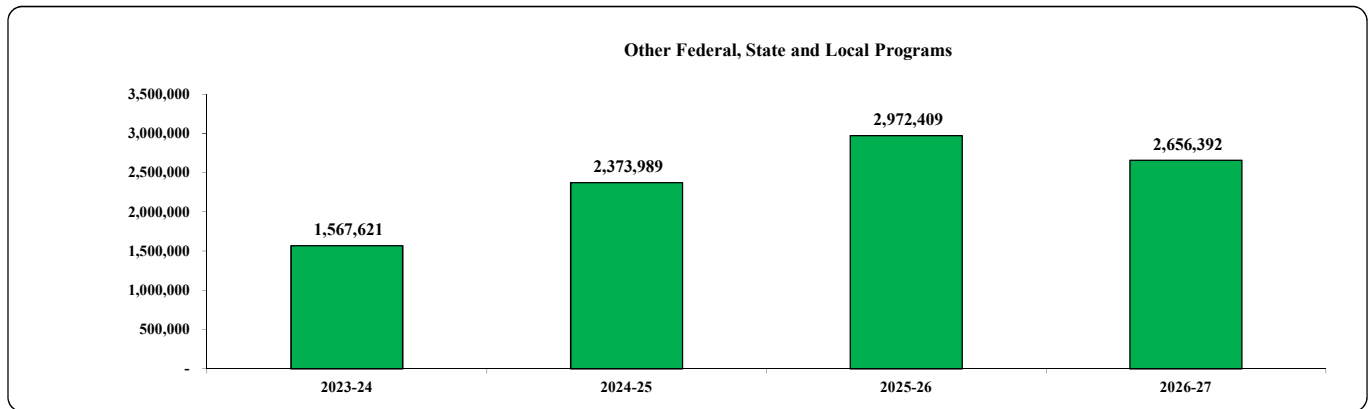
Technology integration and curricular support is provided by a Teacher on Special Assignment. This meets the federal requirement of technology support for this Title program.

Systems Analyst II supports well-rounded schools and district compliance, and a portion of the Family Engagement Liaisons support healthy and safe schools and well-rounded education.

Equitable Services for Private Schools. Private schools that opt-in for Title IV-A services receive a per pupil amount as set by Oregon Department of Education.

Special Revenue Funds - Other Federal, State and Local Programs

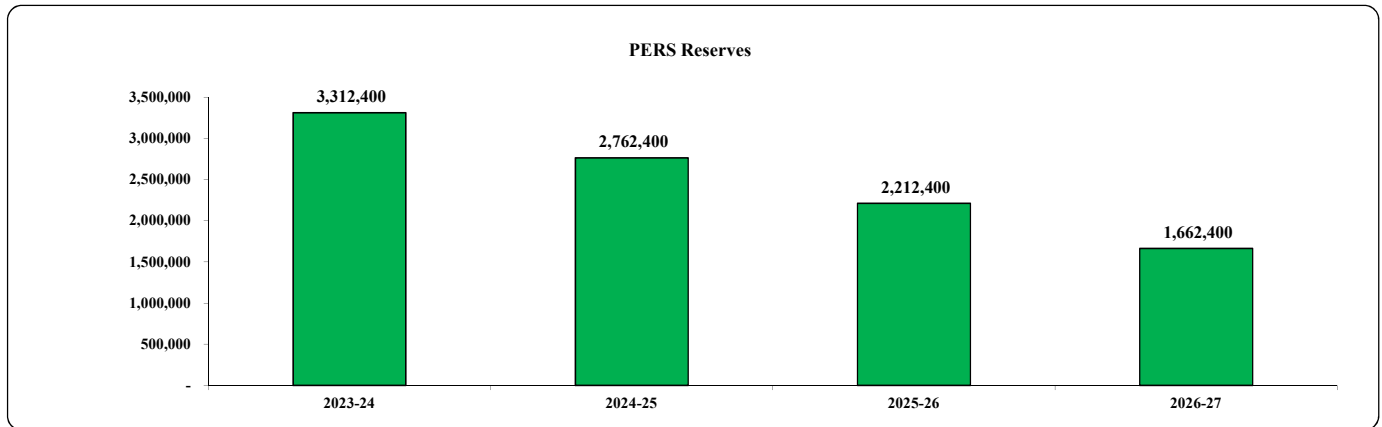
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
RESOURCES						
Local Sources	326,226	597,858	175,000	175,000	175,000	
Intermediate Sources	3,000	2,250	11,330	11,330	11,330	
State Sources	136,626	800,202	1,731,729	1,750,000	1,750,000	
Federal Sources	-	-	13,000	13,000	13,000	
Transfers In	25,000	25,000	25,000	25,000	25,000	
Beginning Fund Balance	1,076,769	948,680	1,016,350	682,062	682,062	
TOTAL RESOURCES	1,567,621	2,373,989	2,972,409	2,656,392	2,656,392	
REQUIREMENTS						
Instruction	354,492	967,029	1,781,729	1,800,000	1,800,000	
Support Services	60,221	342,772	425,000	425,000	425,000	
Community Services	105,077	32,558	33,618	33,618	33,618	
Facilities Acquisition	99,151	15,281	50,000	50,000	50,000	
Transfers Out						
Contingency	873,680	941,350	607,062	272,774	272,774	
Unappropriated Fund Balance	75,000	75,000	75,000	75,000	75,000	
TOTAL REQUIREMENTS	1,567,621	2,373,989	2,972,409	2,656,392	2,656,392	



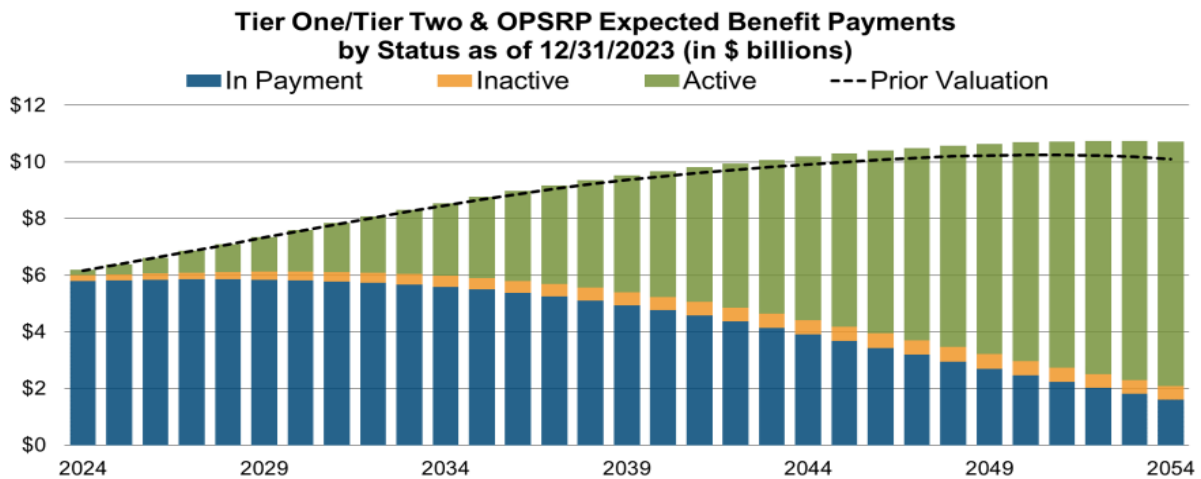
The FY26-27 Budget for Other Federal, State, and Local Programs includes the Food Service Capital Reserve and several smaller, mostly local grants. This includes, but is not limited to: Oregon Community Foundation, Medford Schools Foundation, Aspire, Project Dove, Anna May, Fred Meyer, summer school grant, and West Foundation. This area also includes state Summer School and English Learner Outcomes Program (ELOP) grants. For the Adopted budget for 2026-27, the \$0.3M or 10.6% decrease in resources due to a smaller beginning fund balance.

Special Revenue Funds - PERS Reserves

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
RESOURCES						
Transfers In to PERS	-	-	-	-	-	-
Beginning Fund Balance	3,312,400	2,762,400	2,212,400	1,662,400	1,662,400	
TOTAL RESOURCES	3,312,400	2,762,400	2,212,400	1,662,400	1,662,400	
REQUIREMENTS						
Transfer to GF	550,000	550,000	550,000	550,000	550,000	
Contingency	2,762,400	2,212,400	1,662,400	1,112,400	1,112,400	
Unappropriated Fund Balance						
TOTAL REQUIREMENTS	3,312,400	2,762,400	2,212,400	1,662,400	1,662,400	

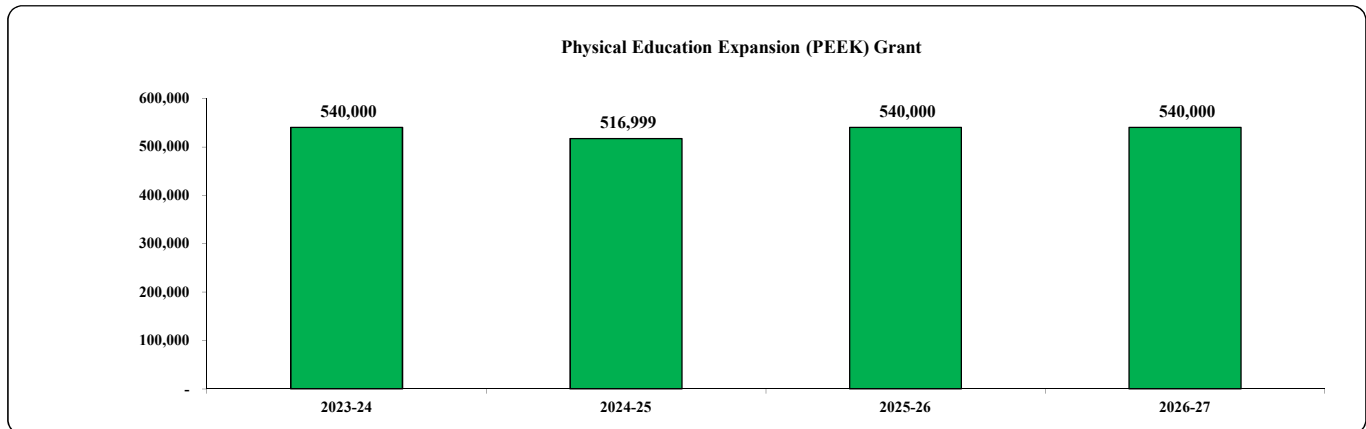


This fund represents the PERS reserve that was originally setup to partially offset large rate increases in the PERS rate over the 2017-19 biennium and beyond. In FY26-27 there will be a transfer of \$0.55M to the General Fund. This fund has approximately three years left of transfers at the current rate. The graph below shows future expected Oregon PERS benefit payouts over time. Benefit payouts are currently projected to peak in the year 2052.



Special Revenue Funds - Physical Education Expansion (PEEK) Grant

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
RESOURCES						
State Sources	250,000	254,000	250,000	250,000	250,000	
Transfer from GF	290,000	262,999	290,000	290,000	290,000	
Beginning Fund Balance						
TOTAL RESOURCES	540,000	516,999	540,000	540,000	540,000	
REQUIREMENTS						
Instruction	540,000	516,999	540,000	540,000	540,000	
Contingency						
TOTAL REQUIREMENTS	540,000	516,999	540,000	540,000	540,000	



This page shows the Physical Education Expansion (PEEK) Grant. The District expects to be awarded the PEEK Grant again for the FY26-27 school year, in the amount of \$250K. We will be notified regarding the FY26-27 school year in the summer of 2026.

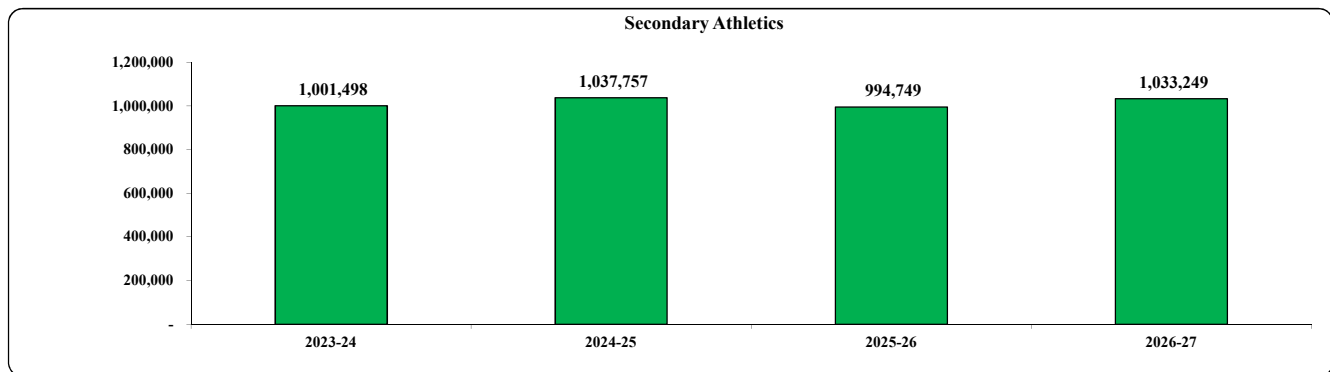
Background

The source of statewide funding for the PEEK grant is from the tobacco settlement monies that were allocated to Oregon.

- The tobacco settlement money is allocated by a separate committee.
- This grant is competitive and was intended to be seed money to get Districts up and running with the idea that the District (over time) would take over funding of their own PE programs.
- It is anticipated that the tobacco settlement money will continue in the next biennium (although there is less certainty about the amounts noted above).
- It is anticipated that more school districts will apply for this grant in the next biennium, based on the current trend and the required minutes of PE instruction per grade level. We are predicting getting less money next year and the year after. Thus far, the Medford School District has received the most funds from this grant.

Special Revenue Funds - Secondary Athletics

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
RESOURCES						
Admissions	145,404	162,332	147,000	155,000	155,000	
Participation Fees	153,769	199,669	155,000	170,000	170,000	
Other Local Sources	35,587	49,227	26,000	26,000	26,000	
State Sources - OSAA	34,214	-	-	-	-	
Transfer from GF	620,000	620,000	575,000	575,000	575,000	
Beginning Fund Balance	12,523	6,528	91,749	107,249	107,249	
TOTAL RESOURCES	1,001,498	1,037,757	994,749	1,033,249	1,033,249	
REQUIREMENTS						
Instruction - Middle School Co-Curricular:						
Salaries and Wages	-	-	600	600	600	
Employee Benefits	-	-	150	150	150	
Purchased Services	64,199	45,202	68,850	68,850	68,850	
Supplies and Materials	29,910	32,173	35,500	50,500	50,500	
Capital Outlay	1,218	34,367	6,000	6,000	6,000	
Other Objects	2,847	2,441	3,000	3,000	3,000	
Total Middle School	98,174	114,183	114,100	129,100	129,100	
Instruction - High School Co-Curricular						
Salaries and Wages	-	-	60,000	76,000	76,000	
Employee Benefits	-	-	15,000	15,000	15,000	
Purchased Services	662,204	536,910	541,750	545,503	545,503	
Supplies and Materials	128,530	132,178	84,650	96,650	96,650	
Capital Outlay	41,700	43,034	20,000	20,000	20,000	
Other Objects	64,363	119,703	52,000	52,000	52,000	
Total High School	896,796	831,825	773,400	805,153	805,153	
Contingency	6,528	91,749	107,249	98,996	98,996	
Fund Balance						
TOTAL REQUIREMENTS	1,001,498	1,037,757	994,749	1,033,249	1,033,249	



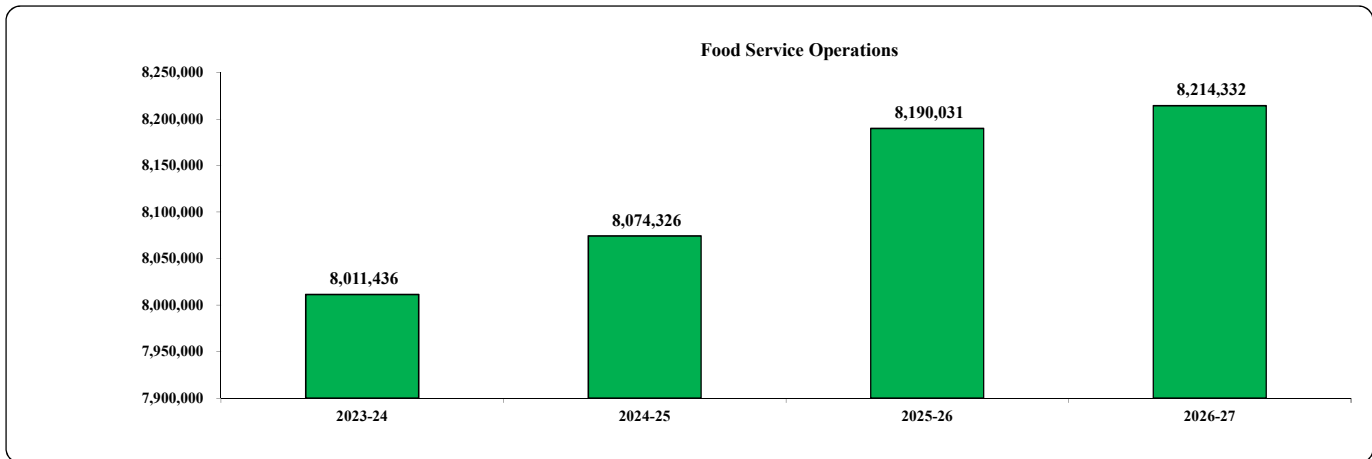
Secondary Athletics includes revenues and expenses other than the coaching stipends that are paid for by the General Fund (GF) in function 1122 (p.37) and 1132 (p.41). In FY26-27, the GF will transfer \$575K to help support this fund. Other revenues are received from admission fees to games and participation fees from athletes.

Other revenue sources include athletic participation fees, and except for football participation fees, these have remained unchanged for several years. The Medford School District has worked to keep the cost of participation fees down for families and remain some of the lowest in our area. Admissions fees have remained consistent with what other schools in our conference charge.

In an effort to increase safety for football, secondary schools are leasing helmets as opposed to purchasing them. This will have more upfront cost, but will eliminate the need for reconditioning helmets. The lessor will provide the reconditioning on an annual basis and will provide helmets that are not older than five years. This will keep athletes in newer technology with a higher standard of care.

Special Revenue Funds - Food Service Operations

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
RESOURCES						
Daily Sales - School Lunch Program	-	-	-	-	-	-
Other Local Sources	186,035	193,014	50,000	50,000	50,000	50,000
Federal Sources - School Lunch	5,054,003	6,180,886	6,131,974	6,242,695	6,242,695	6,242,695
Other Sources	952,561	493,858	602,561	602,561	602,561	602,561
Transfer	-	-	-	-	-	-
Beginning Fund Balance	1,818,838	1,206,568	1,405,496	1,319,076	1,319,076	1,319,076
TOTAL RESOURCES	8,011,436	8,074,326	8,190,031	8,214,332	8,214,332	8,214,332
REQUIREMENTS						
Community Services:						
Salaries/Wages/Benefits	-	-	-	-	-	-
Purchased Services	5,484,119	5,629,080	5,867,666	6,014,358	6,014,358	6,014,358
Supplies and Materials	254,385	40,932	263,289	42,364	42,364	42,364
Other (Primarily Indirect Overhead to General Fund)	200,000	219,122	240,000	240,000	240,000	240,000
Capital Outlay	866,364	779,696	500,000	500,000	500,000	500,000
Total Community Services	6,804,868	6,668,830	6,870,955	6,796,722	6,796,722	6,796,722
Transfers	-	-	-	-	-	-
Contingency	1,206,568	1,405,496	1,319,076	1,417,610	1,417,610	1,417,610
Fund Balance	-	-	-	-	-	-
TOTAL REQUIREMENTS	8,011,436	8,074,326	8,190,031	8,214,332	8,214,332	8,214,332



Total requirements are up \$0.024M or 0.3% from the prior year. The \$0.5M in Capital Outlay for FY26-27 is for outdoor eating area improvements at various locations.

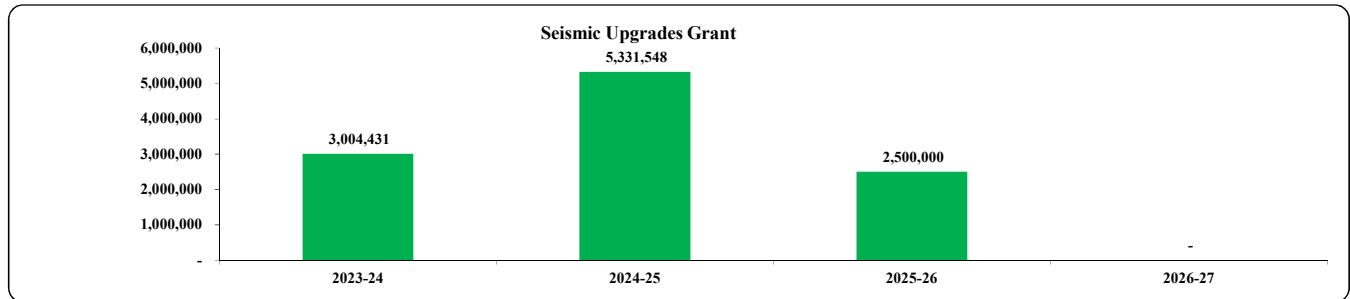
MSD food services are provided for students by Sodexo, Inc. The majority of the anticipated requirements or expenditures are reflected in Purchased Services, which is primarily comprised of Sodexo's fee to the district, which includes all food, supplies, and labor that go into providing individual meals. The remainder of the expenditures is in Supplies and Materials, which is used primarily for commodities. This is required to be accounted for separately and the value is reimbursed to the District by Sodexo as received, and in Capital Outlay, which is primarily used for anticipated replacement of kitchen hardware.

Sodexo serves approximately 1,700,100 meals and equivalent meals per year to students across all 21 school locations. Meals are calculated on the following contractual basis, set by ODE: Lunch and Supper = 1/1, Breakfast = 2/1, Afterschool Snacks = 3/1, Equivalent meals = \$4.99/1.

At this time costs are offset by federal sources and daily sales. The Federal Sources are from the USDA National School Lunch, Breakfast, and Afterschool Snack Programs. If additional resources were needed to cover costs, those resources would come from a transfer from the General Fund.

Special Revenue Funds - Seismic Upgrades Grant

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
RESOURCES						
State Sources	598,834	5,191,040	2,500,000			
Transfer from General Fund	2,650,000	-	-	-		
Beginning Fund Balance	(244,403)	140,508	-	-		
TOTAL RESOURCES	3,004,431	5,331,548	2,500,000	-		
REQUIREMENTS						
Transfer from General Fund	-	-	-	-		
Capital Outlay	2,863,923	5,331,548	2,500,000	-		
Contingency	140,508					
TOTAL REQUIREMENTS	3,004,431	5,331,548	2,500,000	-		



The MSD has seismically upgraded several facilities, but does not have a grant or plans to do so in FY26-27. In 2016-2017, we worked closely with local engineers to develop a districtwide seismic assessment to assist with prioritization and focus resources appropriately. In 2019, we updated the District seismic assessment to further focus our efforts.

Oregon Revised Statute (ORS) 455.400 states, “subject to the availability of funding, all seismic rehabilitations or other actions to reduce seismic risk must be completed before January 1, 2032.” This is no small undertaking and requires a concerted effort and a comprehensive plan. Seismic upgrades take time and significant funding. In terms of strategy, we can accomplish this task through new construction, in conjunction with on-going projects, and/or retrofit.

Two important terms to understanding seismic rehabilitation:

- Life Safety means that a building may be damaged beyond repair during an earthquake, but people will be able to safely exit the building.
- Immediate Occupancy means that not only will the building remain standing after an earthquake but emergency services will be able to continue to operate and provide services.

In addition to the extensive upgrades completed districtwide during the last bond, we have been awarded SRGP funding for several sites over the last seven years. We have completed work at Washington (\$270,000) in 2011, Ruch (\$1,477,100) in 2017, Griffin Creek (\$1,498,160) and Howard in 2018 (\$1,498,690). SRGP grants are not always large enough to upgrade a whole campus; however, this work allowed us to bring several buildings up to life safety standards and bring the Ruch and Howard gyms up to immediate occupancy standards. Work at Hoover was completed in December of 2019 with a \$1,498,345 grant and the District matched the grant funding with an additional \$462,000 to bring the whole campus up to life safety standards and the gym and cafeteria building up to immediate occupancy standards. Using District funds to match the grant funding allowed for the campus to be upgraded in its entirety, with one mobilization, and minimized the level of inconvenience to the school’s education process. The match funds were again used in 2021-2023, when the Oakdale gymnasium was updated to immediate occupancy standards (\$2,499,070) + \$800,000 from the District General Fund.

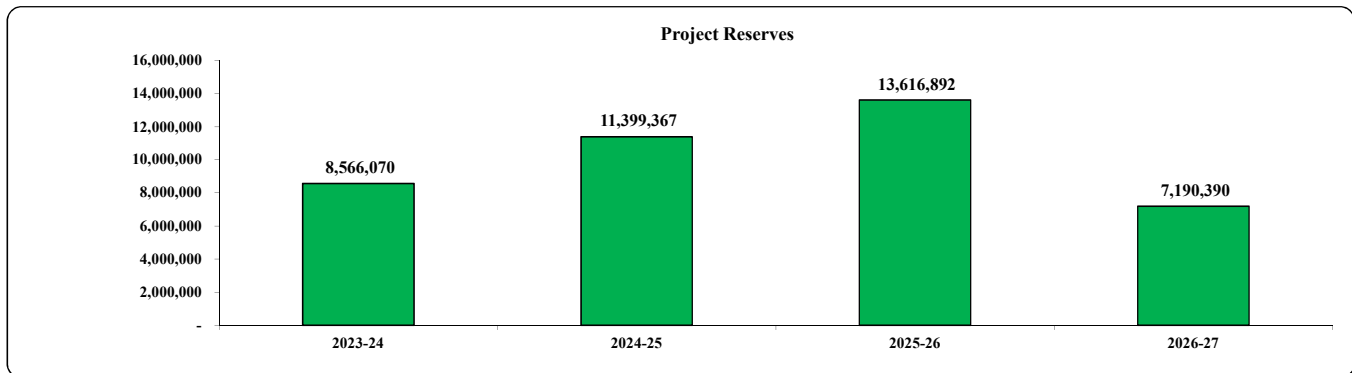
The Jacksonville Elementary Phase I seismic upgrade began in June 2023, and was completed in August of 2023. The entire campus was updated to immediate occupancy standards when Phase II was substantially completed in September of 2024. This project was accomplished through \$2,499,070 in SRGP funding and \$600,000 in match funds from the District.

In the Fall of 2024 the MSD was awarded SRGP funding for a seismic retrofit of Griffin Creek Elementary. These funds will fully cover the cost of bringing classrooms 1-8, the Kindergarten wing, and the cafeteria areas up to immediate occupancy standards, with no need for additional district funds. This project was completed in September, 2025.

MSD will continue to work toward accomplishing all life safety and immediate occupancy seismic goals in the years to come.

Special Revenue Funds - Project Reserves

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
RESOURCES						
Transfer from General Fund	4,335,000	7,017,001	8,010,300	5,158,000	5,158,000	
Transfer from General Fund: Turf Replacement	20,000	20,000	20,000	20,000	20,000	
Other (including PPC, ETO)	417,147	908,229	400,000	470,000	470,000	
Construction Excise Tax (CET)	1,200,488	1,076,699	830,000	830,000	830,000	
Beginning Fund Balance	2,593,435	2,377,439	4,356,592	712,390	712,390	
TOTAL RESOURCES	8,566,070	11,399,367	13,616,892	7,190,390	7,190,390	
REQUIREMENTS						
Instruction:						
Textbooks	796,629	1,387,614	2,500,000	1,750,000	1,750,000	
Total Instruction	796,629	1,387,614	2,500,000	1,750,000	1,750,000	
Network and Telecommunication Services (NTS)						
IT Hardware Spending	1,249,014	1,322,091	928,000	892,700	892,700	
Total NTS Support Services	1,249,014	1,322,091	928,000	892,700	892,700	
Facilities Acquisition and Construction:						
Support Service Spending			458,000	250,000	250,000	
Capital Spending	4,142,988	4,333,070	9,018,502	3,671,050	3,671,050	
Total Facilities Acquisition and Construction	4,142,988	4,333,070	9,476,502	3,921,050	3,921,050	
Total Spending	6,188,630	7,042,775	12,904,502	6,563,750	6,563,750	
Stadium Turf Replacement Reserves	282,515	302,515	302,515	322,515	322,515	
Curriculum Reserves				-	-	
Contingency	2,094,924	4,054,077	409,875	304,125	304,125	
TOTAL REQUIREMENTS	8,566,070	11,399,367	13,616,892	7,190,390	7,190,390	



The Project Reserves Fund is dedicated primarily for curriculum, computer hardware, computer software, large facility repair and maintenance projects, and reserves. The fund is budgeted to receive a \$5.178M transfer from the General Fund in FY26-27 for these purposes. The fund includes a \$20K transfer from the General Fund, which is reserved for future turf replacement at Spiegelberg Stadium. The fund is forecasted to receive Construction Excise Tax (CET) receipts estimated at \$0.83M and Public Purpose Charge (PPC) receipts estimated at \$0.47M. PPC credits are earned for energy savings projects implemented and approved by the Oregon Department of Energy. Most of the PPC credits were earned during the 2006-2012 bond construction and are coming to an end in the next few years.

Year over year requirements are down -\$6.43 M or -47.2% due primarily to two unusually large one-time capital projects for SMHS track and field and Innovation Academy classroom buildout.

This section describes the three areas that are funded under Project Reserves: Curriculum (\$1.75M) for World Languages, Network and Telecommunication Services (\$0.893M), and Facilities (\$3.921M), which are described in detail in the following pages.

Special Revenue Funds - Project Reserves

Capital and Repair and Maintenance Projects Planned for FY26-27

Facilities Projects

Furniture Replacement	Dollars	Project Code	Project Manager
Furniture Replacement Cycle (Administration)	5,000	27PRRFFN00	Facilities
Furniture Replacement Cycle (Elementary)	45,000	27PRRFFNXX	Facilities
Furniture Replacement Cycle (Secondary)	50,000	27PRRFFNXX	Facilities

Site Improvements			
Washington Parking Lot	250,000	27PRRFPK56	Facilities
Lone Pine Parking Lot	210,000	27PRRFPK40	Facilities
Hedrick Roofing	154,000	27PRRFRF06	Facilities
North Roofing-Science & Graphic Arts Building	340,000	27PRRFRF01	Facilities
Columbus Warehouse Roof	146,000	27PRRFRF00	Facilities
Jackson Track	125,000	27PRRFTK24	Facilities
Griffin Creek Restroom Upgrades	35,000	27PRRFRX12	Facilities
ADA Upgrades - North	200,000	27PRRFPADA	Facilities
HVAC Equipment Replacement	50,000	27PRRFHV00	Facilities
Parking Lot Lighting	100,000	27PRRFLT00	Facilities
Lone Pine Security Vestibule	91,050	27PRRFSE40	Facilities
Abraham Lincoln Track	70,000	27PRRFTK11	Facilities
Long Span Truss Inspection & Repair	1,800,000	26PRRFBEAM	Facilities
SPED Facility Upgrades	250,000	27PRRFSPED	Facilities
Total Maintenance Projects FY26-27	3,921,050		

Special Revenue Funds - Project Reserves

Capital Repairs Fund Narratives

Capital and Repair and Maintenance Project Narratives FY26-27

Furniture

Furniture Replacement Cycle – Administration (\$100,000)

Furniture replacement cycle funds for Administration \$5,000, Elementary Schools \$45,000 and Secondary Schools \$50,000

Site Improvements

Washington Parking Lot (\$250,000)

The Washington site needs additional parking spaces. This project will create twenty-four additional spaces where the Pre-K playground was located. The parking area will be code compliant, adding required green space and lighting.

Lone Pine Parking Lot (\$210,000)

The Lone Pine primary parking lot is in need of repairs. These funds will be used to repair and seal the existing parking area and re-apply appropriate paint lines.

Hedrick Roofing (\$154,000)

The entire Hedrick campus is in need of a new roof. We have identified the most deficient area to be the east roof paralleling Keene Way. This project will replace the current roof that was installed in 2008 with a new membrane roof including a No Dollar Limit (NDL) 20 year warranty.

North Roofing - Science & Graphic Arts Building (\$340,000)

Both of these buildings show significant signs of cracking in the roofing material. This project will replace the current roofs that were installed in 1990 and 2000 respectively, with a new membrane roof including a No Dollar Limit (NDL) 20 year warranty.

Columbus Warehouse Roof (\$146,000)

The District Warehouse has several leaks that could potentially damage items stored there. This project will remove the old roofing that was installed in 1985, and replace it with a new membrane roofing material that includes a No Dollar Limit (NDL) 20 year warranty

Jackson Track (\$125,000)

These funds will be used to replace Jackson Elementary's deteriorated track. The current track has degraded to little more than gravel. The track area will be re-graded and prepared for asphalt with an upgraded substrate.

Griffin Creek Restroom Upgrades (\$35,000)

These funds will be used to resurface the floors and replace the damaged stall panels in the boys and girls restrooms adjacent to room 25.

ADA Upgrades - North (\$200,000)

A recent ODE assessment of the District's ADA compliance at North produced a list of upgrades that need to be addressed. Most of the items pertain to Accessible parking spaces and path of travel from these spaces to the building entrances. Others will be included in the gym rebuild. One item that will account for most of these funds is an ADA accessible path to the new Field House.

HVAC Equipment Replacement (\$50,000)

These funds will be used to replace antiquated rooftop equipment.

Parking Lot Lighting (\$100,000)

In an effort to create safer parking areas, these funds will be used to add LED lighting to the parking lot at Jacksonville Elementary.

Lone Pine Security Vestibule (\$91,050)

These funds will cover the cost associated with the addition of a security vestibule at Lone Pine.

Special Education Facility Upgrades \$250,000

Facility upgrades necessary to house MAPS and FOCUS classes at various school locations

Long Beam Span Inspection & Repairs (\$1,800,000)

Second year of long beam span inspection & repair as required by insurance

Abraham Lincoln Track (\$70,000)

The ALE PTO has raised funds to replace their existing track. The project consists of removing the existing and replacing the asphalt with minimal work done to the substrate.

Total Capital Repair and Maintenance Projects FY26-27	\$	3,921,050
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Special Revenue Funds - Project Reserves

Network and Telecommunication Projects Planned for FY26-27

Description	JL or PO	Dollars	Manager
Computer Replacements	27PRRFCR00	254,700	Brabham
Security Camera Replacements	27PRRFSC00	320,000	Brabham
Copier Replacements	27PRRFCO00	118,000	Brabham
Projector Additions and Replacements	27PRRFPJ00	200,000	Brabham

Total Network & Telecommunication Projects FY26-27	892,700
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Computer Replacement (\$254,700)

Computer replacements for school and district level administrative computers, after replacing teacher computers at all schools the previous two years.

Security Camera Replacements (\$320,000)

Ongoing replacement plan of security cameras, replacing aging cameras not included in initial upgrade and adding additional cameras based off of security assessments.

Copier Replacements (\$118,000)

Replacement of the oldest production copier in Print shop.

Projector Additions and Replacements (\$200,000)

Installation of interactive short-throw projectors in non-core classrooms and replacement of the oldest projectors.

Total IT Infrastructure Projects FY26-27	\$ 892,700
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Special Revenue Funds - Project Reserves

Curriculum Spending Plan

Curriculum is aligned, reviewed, and updated on a seven year cycle. During the school year, prior to reviewing instructional materials, the District K-12 teams align standards and learning targets. As part of the process, teams also review open source materials and integrated technology needs. Professional development is provided to all teachers in the content area when new materials are adopted. The state allows districts three options: adopt new materials from the state-approved list, maintain current materials, or complete an independent adoption.



Year	Phase 1: Curriculum Alignment, Curriculum Identification & Planning	Phase 2: Training, Purchase and Implementation Monitoring & Feedback	Phase 3: Full Curriculum Implementation with continued Monitoring, Evaluation & Feedback	Phase 4: Core Curriculum & Instructional Materials Evaluation & Feedback	Phase 5: Instructional Materials Renewal
2022-2023	K-12 ELA K-12 ELP				
2023-2024	K-12 Math	K-12 ELA K-12 ELP			
2024-2025	K-12 Math	K-12 ELA K-12 ELP	K-12 ELA K-12 ELP		
2025-2026	K-12 Science K-12 Health and Physical Education K-12 Social Science	K-12 Math	K-12 ELA K-12 ELP		
2026-2027	World Languages and the Arts	K-12 Science K-12 Health and Physical Education K-12 Social Science	K-12 ELA K-12 ELP K-12 Math	K-12 ELA K-12 ELP	
2027-2028		World Languages and the Arts	K-12 Math K-12 Science K-12 Health and Physical Education K-12 Social Science	K-12 ELA K-12 ELP	

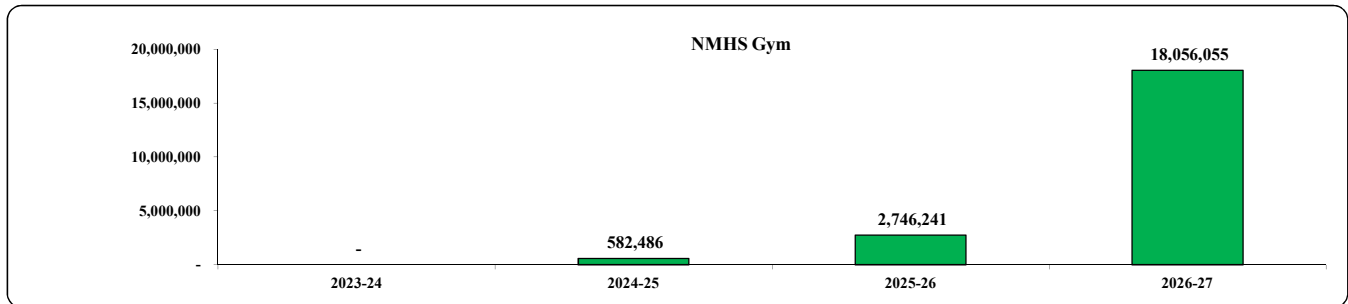
Curriculum FY26-27

According to the adoption cycle, World Languages and the Arts instructional materials will be reviewed by teams of teachers for recommendation to the school board for approval. \$1,750,000.00 is currently budgeted in Curriculum expenditures for FY26-27. We will request that the board approved the expenditure and the materials will be implemented beginning August, 2027.

Making an investment in the highest quality instructional materials is vital to ensure a rigorous and engaging curriculum aligned to state standards and across all classrooms. The process to select instructional materials involves classroom teachers and administrators conducting a thorough review of Oregon State Standards, state approved materials, and evaluation against a rubric addressing rigor, accessibility for diverse learners, and alignment to state standards. Implementation of new curriculum includes professional development and ongoing instructional coaching.

Total Curriculum FY26-27 \$1,750,000

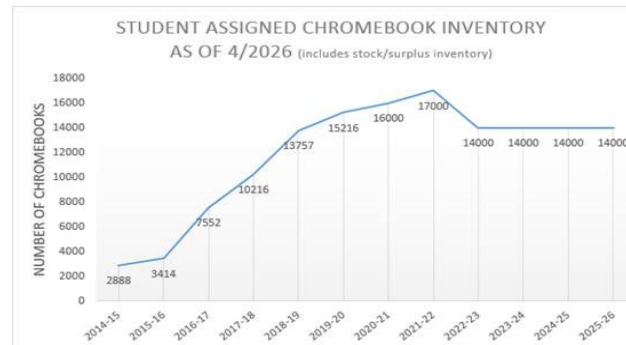
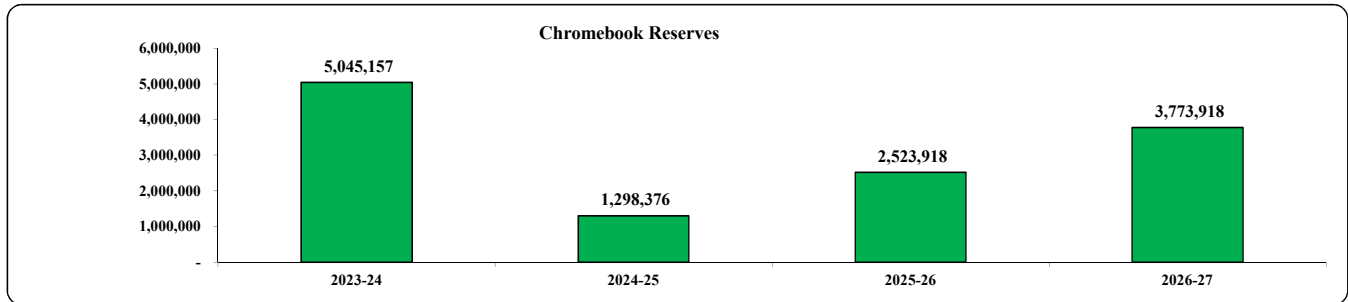
Special Revenue Funds - NMHS Gym Rebuild						
Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
RESOURCES						
Transfer from GF			607,700			
Local Revenue		582,486	1,582,486	18,000,000	18,000,000	
Beginning Fund Balance			556,055	56,055	56,055	
TOTAL RESOURCES	-	582,486	2,746,241	18,056,055	18,056,055	
REQUIREMENTS: Capital						
Capital Spending		26,431	2,690,186			
Total Capital Spending	-	26,431	2,690,186	18,023,569	18,023,569	
Contingency	-	556,055	56,055	32,486	32,486	
Unappropriated Fund Balance						
TOTAL REQUIREMENTS	-	582,486	2,746,241	18,056,055	18,056,055	



This page is to outline the spending for the North Medford High School gym rebuild. This also includes the out building for PE during the time that the gym is under construction/repair. Insurance has approved repairs and they are underway and will continue throughout the next fiscal year.

Special Revenue Funds - Support Services for Chromebook Spending

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
RESOURCES						
Transfer from GF	1,250,000	1,250,000	1,250,000	1,250,000	1,250,000	
Local Revenue	30,769	48,376	-	-	-	
Beginning Fund Balance	3,764,388	-	1,273,918	2,523,918	2,523,918	
TOTAL RESOURCES	5,045,157	1,298,376	2,523,918	3,773,918	3,773,918	
REQUIREMENTS: Instruction						
Support Services	5,045,157	24,458	-	-	-	
Total Instruction	5,045,157	24,458	-	-	-	
Contingency	-	1,273,918	2,523,918	3,773,918	3,773,918	
TOTAL REQUIREMENTS	5,045,157	1,298,376	2,523,918	3,773,918	3,773,918	

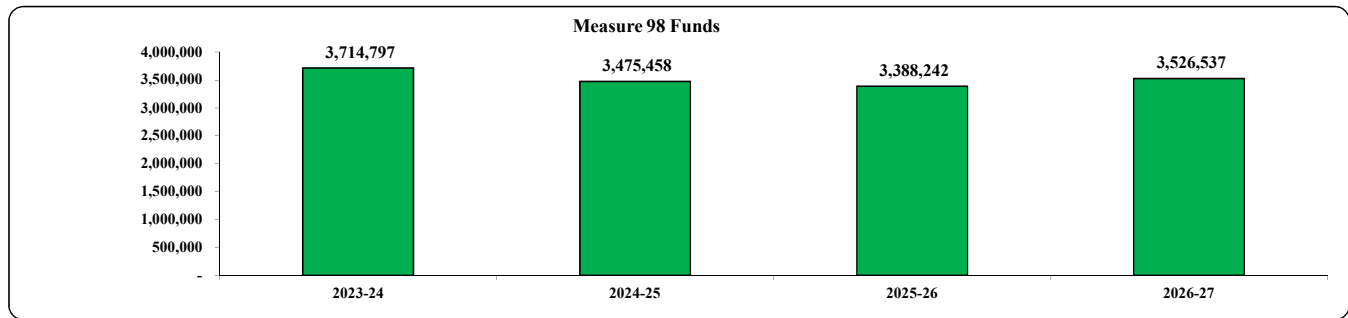


Chromebook Narrative

The District began setting aside \$1.25M each year starting in FY20-21 towards a new Chromebook Reserves account. Chromebooks cost approximately \$400 each and have an expected life span of six years. In past years, Chromebooks have been expensed out of the Special Revenue Projects Reserves Fund (pp.115-119) and the General Fund function Network and Telecommunication Services, 2669 (p.98). In January 2024 the District refreshed all student Chromebooks. In FY26-27 the number of Chromebooks remains static at 14,000.

Special Revenue Funds - Measure 98 High School Success

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
RESOURCES						
State Sources	3,718,715	3,467,009	3,388,242	3,526,537	3,526,537	
Beginning Fund Balance	(3,918)	8,448	(0)	0	0	
TOTAL RESOURCES	3,714,797	3,475,458	3,388,242	3,526,537	3,526,537	
REQUIREMENTS: Instruction:						
CTE	1,458,257	1,324,419	1,125,461	1,171,559	1,171,559	
College and Career Readiness	1,192,078	1,306,352	1,131,391	1,177,489	1,177,489	
Dropout Prevention	1,056,014	844,687	1,131,391	1,177,489	1,177,489	
Total Instruction	3,706,349	3,475,458	3,388,242	3,526,537	3,526,537	
Contingency	8,448	(0.00)	0	0	0	
TOTAL REQUIREMENTS	3,714,797	3,475,458	3,388,242	3,526,537	3,526,537	



In November 2016, Oregon voters passed ballot Measure 98 also known as the High School Success (HSS) Act. Coming on the heels of the Great Recession which resulted in deep cuts to Oregon public education, the High School Success Act aims to reestablish and expand Career and Technical Education (CTE), enhance college and career readiness, and significantly increase drop-out prevention services. The bulleted items below highlight Medford School District's High School Success investment priorities:

Career and Technical Education

- Continue development and expansion of CTE programs aligned with Rogue Valley workforce priorities: Construction Technology, Manufacturing, Health Science, Education, Computer Science/IT, Agriculture, Culinary, Engineering, Emergency Services, and Transportation
- Expand construction trades pre-apprenticeship (MPACT) training to include: Plumbing, Electrical, HVAC and Residential Carpentry
- Provide all high school students community-based, career training opportunities.
- Expand work-based learning opportunities for all CTE students including pre-apprenticeships, youth internships and integrated work-simulations
- Deepen and expand partnerships with industry employers and community colleges to facilitate CTE students' successful transition into the workforce or postsecondary enrollment
- Expand introductory level CTE courses into middle schools
- Maintain the FTE, equipment and learning resources needed to support MSD CTE programs

College Level Opportunities

- Develop a K-12 School Counseling framework based on the American School Counselor Association (ASCA) standards and Oregon's Framework for Comprehensive School Counseling Programs
- Support middle and high school counseling FTE
- Develop a Student Pathways Plan function within Synergy to document students' pathway selection and connect students' emerging career interests with related high school courses
- Provide tuition support for high school students enrolled in postsecondary courses and courses for industry recognized certifications or credentials
- Increase enrollment of historically underrepresented students in AP and other advanced coursework through regular, systematic monitoring
- Align and articulate MSD Pathways courses with postsecondary degree programs and courses.
- Provide professional development for engagement and retention of historically underrepresented students in college-level courses

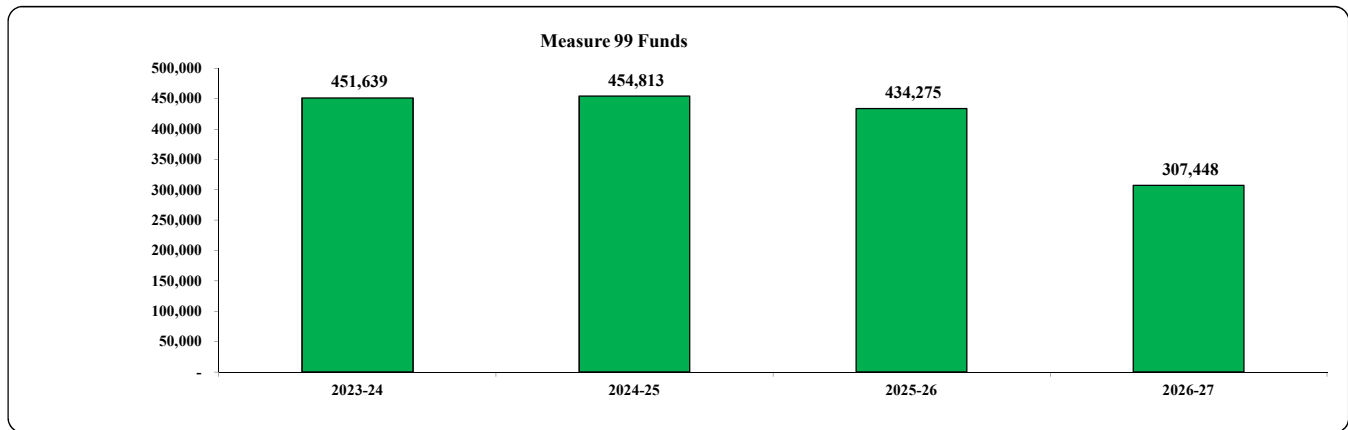
Drop Out Prevention

- Provide RVTB bus transportation to increase student access
- Provide FTE and learning resources for credit retrieval
- Provide FTE and resources for youth suicide prevention services
- Support FTE for coordinated, case management services (Maslow Project) for houseless students under the McKinney-Vento Act
- Provide community-based mental health counseling services at each secondary school

For 2026-27 HSS will fund approximately 21.45 FTE

Special Revenue Funds - Measure 99 Outdoor School

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
RESOURCES						
State Sources	346,564	358,370	358,964	250,000	250,000	
Beginning Fund Balance	105,075	96,443	75,311	57,448	57,448	
TOTAL RESOURCES	451,639	454,813	434,275	307,448	307,448	
REQUIREMENTS						
Instruction	355,196	379,502	376,827	250,000	250,000	
Total Instruction	355,196	379,502	376,827	250,000	250,000	
Pass-through to Charter Schools						
Contingency	96,443	75,311	57,448	57,448	57,448	
TOTAL REQUIREMENTS	451,639	454,813	434,275	307,448	307,448	



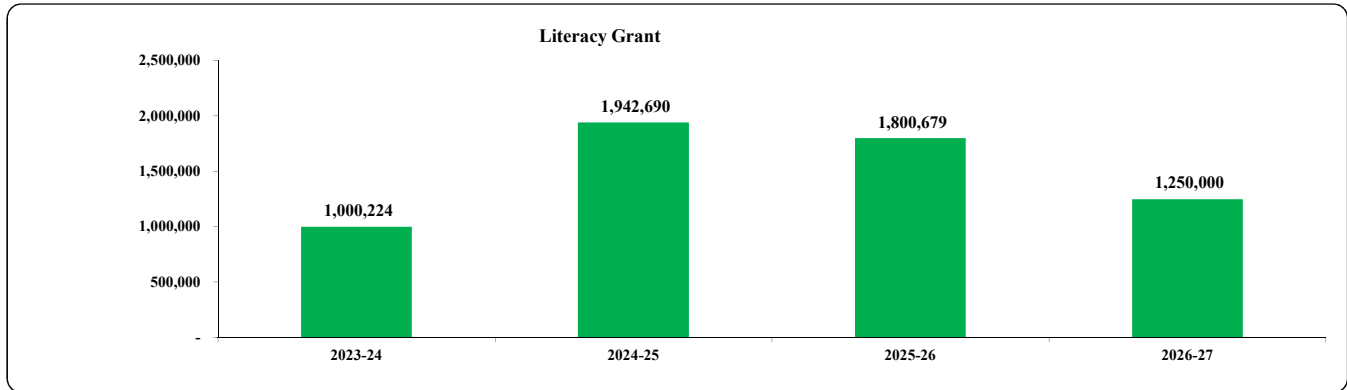
Measure 99 created an Outdoor School Education Fund from Oregon State Lottery Funds. The measure required that withdrawals from the State Lottery Fund cannot reduce lottery proceeds dedicated to the restoration and preservation of parks, beaches, watersheds, and native fish and wildlife. The Outdoor School Education Fund was designed to provide Oregon fifth- and sixth-grade students with an outdoor school program. The Oregon State University Extension Service assists in the administration of the funds.

MSD is given a dollar amount per student based on the length of each program, ranging from \$80 per student for three days (with no overnights) up to \$456 for six days (with five overnights).

Continued funding of this program is contingent on many factors at the state level and at the time of the adoption of the budget funding for 2026-27 has not been finalized but is expected to be below prior year levels due to cuts in funding.

Special Revenue Funds - Literacy Grant

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
RESOURCES						
State Sources	1,000,224	1,046,216	1,793,160	1,250,000	1,250,000	
Beginning Fund Balance		896,474	7,519			
TOTAL RESOURCES	1,000,224	1,942,690	1,800,679	1,250,000	1,250,000	
REQUIREMENTS						
Instruction	103,750	1,935,171	1,800,679	1,250,000	1,250,000	
Contingency	896,474	7,519	-	-	-	
TOTAL REQUIREMENTS	1,000,224	1,942,690	1,800,679	1,250,000	1,250,000	



Medford School District's Literacy Plan centers around implementation of research based practices and implementation of all of the components of English Language Arts Instruction. Early Literacy and High Dosage Tutoring dollars will enable us to offer professional development and coaching, small group literacy intervention, and monitor our efforts with student growth assessment.

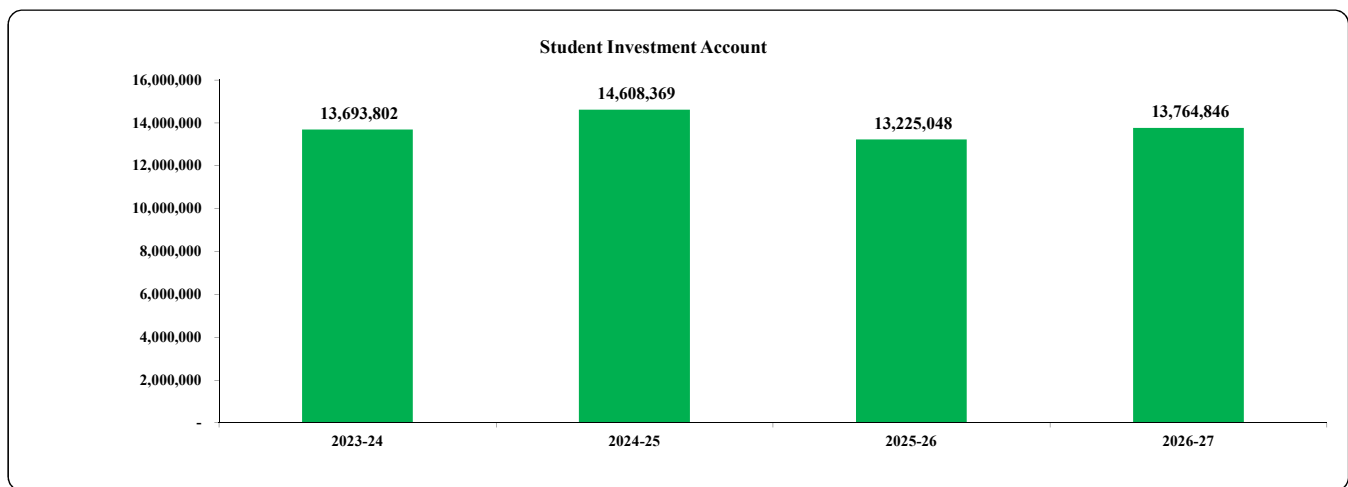
MSD Educators will undergo targeted professional development and coaching centered around evidence-based literacy strategies, designed to enhance literacy instruction and support them in the use of rigorous curriculum.

One way we assess student growth is by utilizing i-Ready Diagnostic. The i-Ready diagnostic is an individualized, computerized, adaptive assessment of phonemic awareness, phonics, high frequency words, vocabulary, comprehension of literature, and comprehension of informational text. The data is used to group students for Additional Targeted Instruction. It is also used to monitor district level systems' health. (\$73K)

There is a budget for 4 FTE of Literacy Coaches will be funded from this grant to provide Professional Development and Coaching to staff for the implementation of the Medford SD Early Literacy Plan. (\$705K)

Special Revenue Funds - Student Investment Account

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
RESOURCES						
State Sources	13,030,153	13,624,217	13,225,048	13,764,846	13,764,846	-
Beginning Fund Balance	663,649	984,153				
TOTAL RESOURCES	13,693,802	14,608,369	13,225,048	13,764,846	13,764,846	
REQUIREMENTS						
Instruction	7,619,130	10,367,990	7,930,908	8,470,706	8,470,706	
Support Services	4,573,017	3,958,964	4,755,938	4,755,938	4,755,938	
Community Services	517,502	281,415	538,202	538,202	538,202	
Facilities Acquisition/Construction						
Contingency	984,153	0	-	-	-	
Unappropriated Fund Balance & Reserves						
TOTAL REQUIREMENTS	13,693,802	14,608,369	13,225,048	13,764,846	13,764,846	



The Student Investment Account (SIA) is funded by a State Corporate Activity Tax (CAT) beginning with a partial year of funding in FY20-21. FY21-22 was the first year for full funding SIA. The funds are focused on improving the following student performance/metrics:

- On-time 4-year graduation and 5-year completion
- Ninth grade on-track rates
- Third grade reading proficiency rates
- Regular attender rates
- Other applicable local metrics

Allowable uses of SIA funds are broadly defined as:

- Expanding Instructional Time
- Addressing Student Health and Safety
- Reducing Class Size and Caseloads
- Providing a Well-Rounded Education

The District Summary Level year over year plan is shown on the following page. The SIA budget from the state has been in fluctuation and the District will adjust the allocated sources as needed. The SIA budget is expected to decrease in FY26-27, which is compensated for by transferring FTE from the SIA budget to the General and Title Funds.

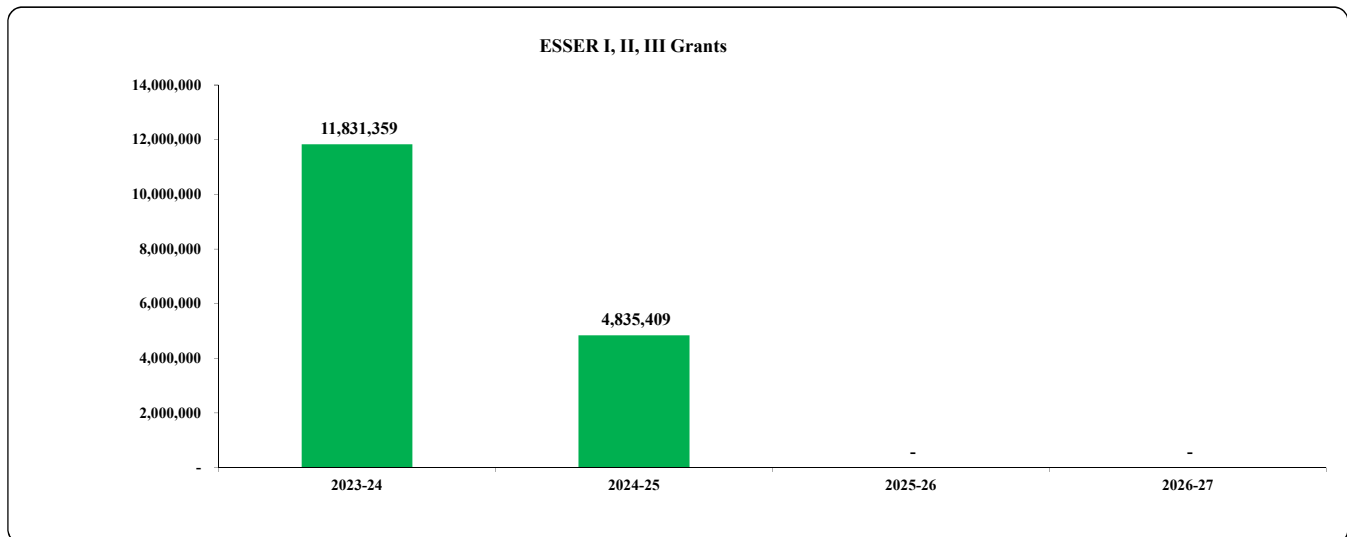
Special Revenue Funds - Student Investment Account

Description	2025-26			2026-27	
	FTE	Budget		FTE	Budget
Decrease SPED class size and caseloads	18.75	\$2,390,398.16		18.75	\$2,485,414.09
Non SPED class size reduction K-12	26.00	3,167,232.28		25.00	3,185,569.31
Elementary School Assistant Principals	10.00	1,901,064.71		10.00	1,986,150.91
Community Outreach Liaisons	3.00	298,417.53		3.00	310,200.38
Literacy and Math Curriculum Personnel & Activities	3.00	736,799.71		3.00	825,219.23
Expand On Site Kindergarten Readiness	Contracted Staff	375,000.00		Contracted Staff	375,000.00
Kindergarten Readiness Facility Improvements		5,000.00			5,000.00
Extended Learning		24,742.70			25,502.70
Well Rounded - Expand Enrichments in Elementary	9.00	1,162,297.34		9.00	1,208,389.23
Student Crisis Support	Contracted Staff	35,000.00		Contracted Staff	120,000.00
Social Development Curriculum		30,897.30			36,358.23
SEA Specialists	9.00	1,204,348.47		9.00	1,252,002.41
Family and Student Survey/Data Collection		17,205.53			17,205.53
SUBTOTAL	78.75	11,348,403.73		77.75	11,832,012.03
Indirect Overhead		500,000.00			500,000.00
Subtotal Excluding Charter Schools		11,848,403.73			12,332,012.03
Charter School Pass Through		1,376,644.56			1,432,834.15
GRAND TOTAL	78.75	13,225,048.29		77.75	13,764,846.18

The SIA for FY26-27 is 4.0% higher than 2025-26. The 2026-27 SIA budget had to reduce 1.0 FTE due to this funding level not covering all cost increases, primarily driven by the assumption of a 4.25% COLA. Outside of this one change, the overall program is consistent year over year.

Special Revenue Funds - Elementary and Secondary School Emergency Relief Funds (ESSER) Grants

Object Description	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
RESOURCES						
Federal Sources	11,831,359	4,835,409	-			
Beginning Fund Balance						
TOTAL RESOURCES	11,831,359	4,835,409	-			
REQUIREMENTS						
Instruction	3,647,930	1,310,137	-			
Support Services	451,714	380,913	-			
Community Services	2,091	1,009	-			
Facilities Acquisition/Construction	7,729,625	3,143,350	-			
Other Uses - Debt Service						
Other Uses: Transfers Out	-					
Contingency						
Unappropriated Fund Balance & Reserves						
Total Requirements	11,831,359	4,835,409	-			-



Elementary and Secondary School Emergency Relief (ESSER) funds are currently three separate Federal grants with a similar focus targeted to address the impacts that COVID-19 has had, and continues to have, on our educational community.

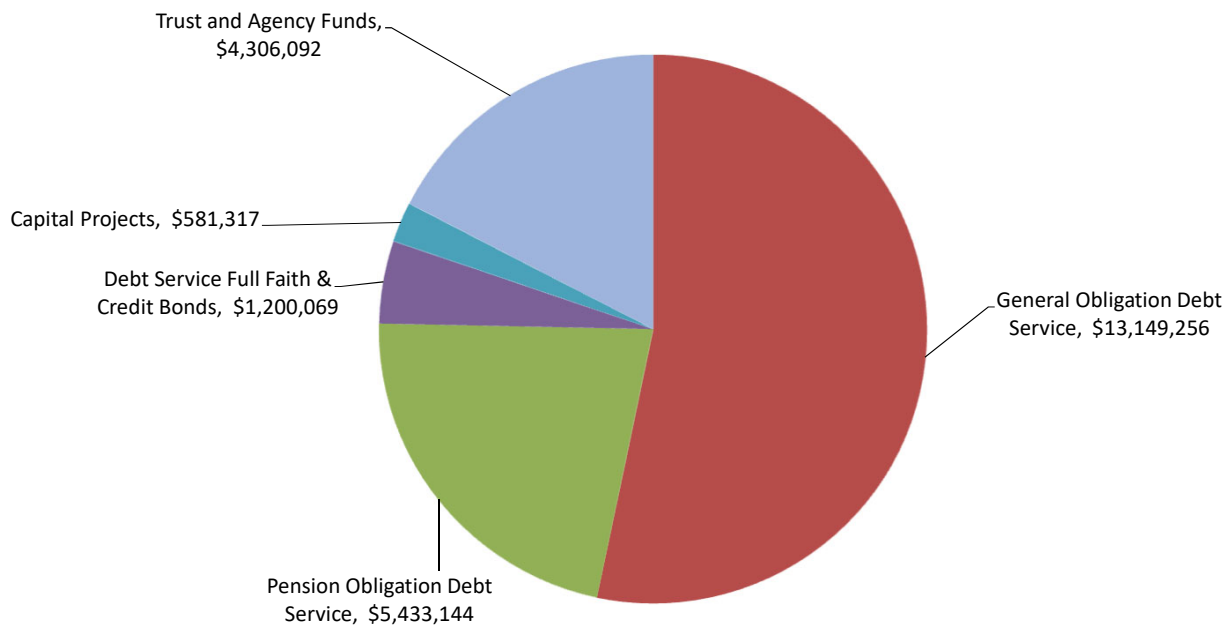
Acceptable uses of these funds are similar, though not exactly the same for all three grants, and they are defined in broad terms including, but not limited to:

- Other activities necessary to maintain the operation of and continuity of services in LEAs and continuing to employ existing staff
- Purchasing educational technology, which could include hardware, software, and connectivity, for students served by the LEA that aids in regular, substantive educational interaction between students and educators, including low-income students and students with disabilities
- Addressing learning loss among all students in all subgroups (20% of ESSER III)
- School facility repairs and improvements to enable operation of schools to reduce risk of virus transmission and exposure to environmental health hazards and support student health needs (ODE agrees this also means the needs for additional instruction space)
- Providing resources for principals and others school leaders to address school-specific needs

The final ESSER III grant funding period ended 9/30/2024.

Resources and Requirements - Other Funds

Debt Service - General Obligation School Bonds
Debt Service - Pension Obligation Bonds
Debt Service - MSDEC Remodel
Capital Projects Fund - MSDEC Remodel
Capital Projects Fund
Self Funded Health Insurance Fund
Trust and Agency Funds - Student Scholarships
Trust and Agency Funds -Student Body Funds



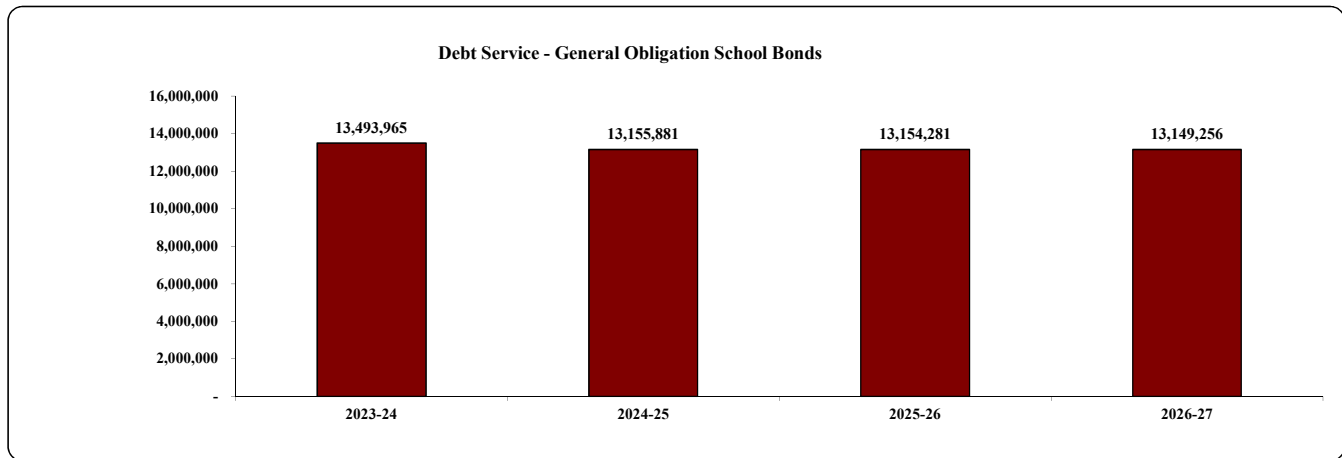
Other Funds Summary	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
Debt Service - General Obligation School Bonds	13,493,965	13,155,881	13,154,281	13,149,256	13,149,256	-
Debt Service - Pension Obligation Bonds	5,592,466	5,997,316	6,058,057	5,433,144	5,433,144	-
Debt Service -2021 Full Faith & Credit Bonds	1,199,069	1,199,669	1,201,469	1,200,069	1,200,069	-
Subtotal Debt Service	20,285,501	20,352,866	20,413,807	19,782,469	19,782,469	-
Capital Projects Fund - 2021 Full Faith & Credit Bonds	(5,850)	-	-	-	-	-
Capital Projects Fund	454,979	511,110	537,317	581,317	581,317	-
Subtotal Capital Projects	449,129	511,110	537,317	581,317	581,317	-
Health Insurance Fund	21,423,247	6,746,816	-	-	-	-
Trust and Agency Funds - Student Scholarships	682,858	706,361	764,222	714,222	714,222	-
Trust and Agency Funds -Student Body Funds	3,541,239	3,741,852	3,661,870	3,591,870	3,591,870	-
Subtotal Trust and Agency	4,224,097	4,448,213	4,426,092	4,306,092	4,306,092	-
Total Appropriations	46,381,973	32,059,005	25,377,217	24,669,878	24,669,878	-

Other funds are down -\$0.26M (-1%) due primarily to the natural decrease in the bond funds. Please see the following pages for detailed explanations.

Debt Service - General Obligation School Bonds

Debt Service General Obligation Bonds	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
RESOURCES						
Local Sources						
Current Year Taxes	12,247,711	12,250,421	12,430,475	12,425,450	12,425,450	
Prior Year Taxes	307,655	121,057	350,000	350,000	350,000	
Interest/Other	97,004	77,238	15,000	15,000	15,000	
Total Local Sources	12,652,370	12,448,716	12,795,475	12,790,450	12,790,450	
Beginning Fund Balance	841,595	707,165	358,806	358,806	358,806	
TOTAL RESOURCES	13,493,965	13,155,881	13,154,281	13,149,256	13,149,256	
REQUIREMENTS						
Other Uses - Debt Service:						
Principal Redemption	8,300,000	8,645,000	8,935,000	9,330,000	9,330,000	
Interest Payments	4,486,050	4,151,325	3,858,475	3,458,450	3,458,450	
Dues and Fees	750	750	2,000	2,000	2,000	
TOTAL DEBT SERVICE*	12,786,800	12,797,075	12,795,475	12,790,450	12,790,450	
Contingency	707,165	358,806	358,806	358,806	358,806	
Unappropriated Fund Balance	-	-	-	-	-	
TOTAL REQUIREMENTS	13,493,965	13,155,881	13,154,281	13,149,256	13,149,256	

*Appropriation Level



The District has one outstanding General Obligation Debt Bond issuance. The 2015 bonds refunded the majority, but not all, of the outstanding 2007A, 2007B, 2008 and 2009 bonds to reduce interest rates. The 2007A bond payments finished in 2016-17 and payments on the 2007B, 2008, and 2009 bond payments finished in fiscal 2017-18. The 2015 refunding bonds have both interest and principal payments from 2017-18 through 2033-34. Total principal outstanding on the General Obligation bonds at the beginning of FY26-27 will be \$74.8M. The budget reflects the principal and interest payment schedule defined at issuance of the 2015 refunding bonds. Annual principal and interest payments on the remaining General Obligation Debt Bonds will remain relatively steady averaging \$12.8M through 2031-32 before reducing to \$10.2M in 2032-33 and \$1.8M in 2033-34.

Debt Service - Pension Obligation Bonds

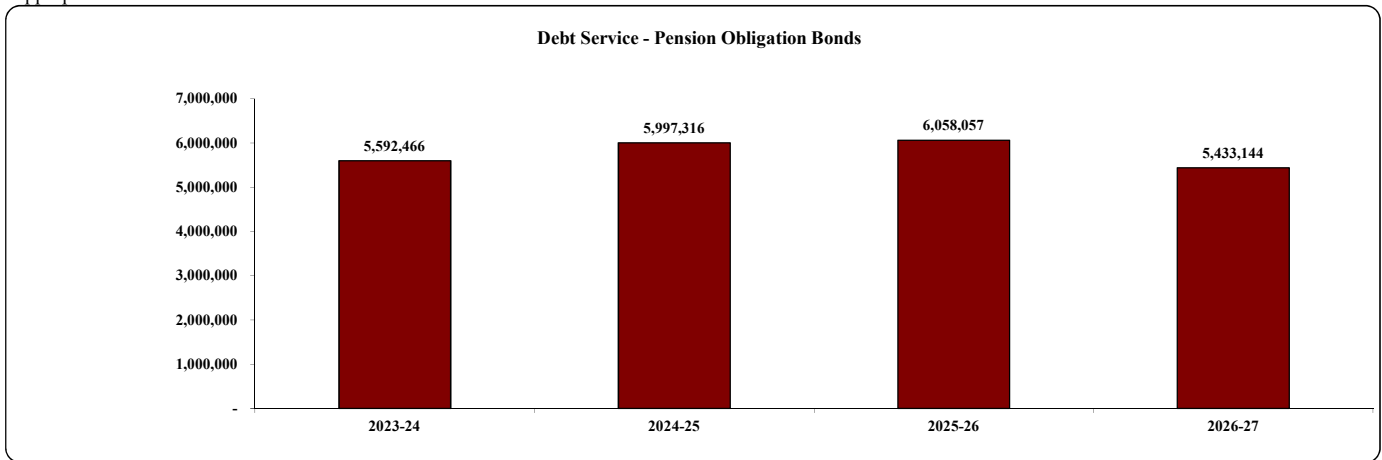
Debt Service Pension Bonds	2023-24	2024-25	2025-26	2026-27	2026-27	2026-27
RESOURCES	Actual	Actual	Amended	Proposed	Approved	Adopted
Local Sources:						
Services provided by other funds	5,067,990	5,183,010	5,050,000	4,582,072	4,582,072	
Other Sources:						
Interest/Other	2	7				
Beginning Fund Balance	524,475	814,299	1,008,057	851,072	851,072	
TOTAL RESOURCES	5,592,466	5,997,316	6,058,057	5,433,144	5,433,144	

REQUIREMENTS

Other Uses - Debt Service:

Principal Redemption	3,770,000	4,195,000	4,650,000	5,140,000	5,140,000	
Interest Payments	1,007,418	793,509	555,485	291,644	291,644	
Dues and Fees	750	750	1,500	1,500	1,500	
UAL lump sum payment to PERS	-	-	-	-	-	
Total Debt Service*	4,778,168	4,989,259	5,206,985	5,433,144	5,433,144	
Contingency	814,299	1,008,057	851,072	-	-	
Unappropriated Fund Balance	-	-	-	-	-	
TOTAL REQUIREMENTS	5,592,466	5,997,316	6,058,057	5,433,144	5,433,144	

*Appropriation Level

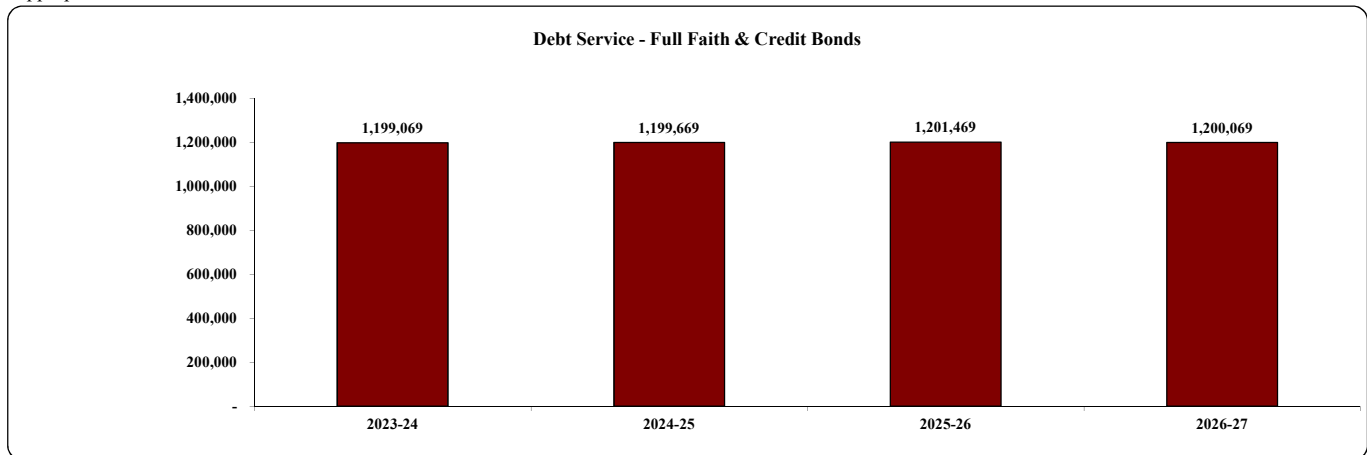


In 2007, the District issued \$40.2M of Pension Obligation Bonds, the proceeds of which went directly to the Oregon Public Employee Retirement System (PERS) as a pre-payment on future District pension obligations for the purpose of reducing the District's annual PERS contribution rates. Debt Service is scheduled to be paid through Fiscal 2026-27. The budget reflects the principal and interest payments schedule defined at the issuance of the bonds. Revenue for payments on these bonds is funded through withholding as a percentage of gross payroll for PERS. At the beginning of FY26-27 there will be \$5.14M in principal due on the Pension Obligation Bonds and the final principal payment will be made in June 2027.

Debt Service - 2021 Full Faith & Credit Bonds

Debt Service FFC Bonds	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
RESOURCES						
Resources:						
Transfer from General Fund	1,170,000	1,170,000	1,170,000	1,170,000	1,170,000	
Other Sources:						
Interest/Other						
Beginning Fund Balance	29,069	29,669	31,469	30,069	30,069	
TOTAL RESOURCES	1,199,069	1,199,669	1,201,469	1,200,069	1,200,069	
REQUIREMENTS						
Other Uses - Debt Service:						
Principal Redemption	520,000	540,000	565,000	585,000	585,000	
Interest Payments	648,650	627,450	605,350	582,350	582,350	
Dues and Fees	750	750	1,050	1,050	1,050	
UAL lump sum payment to PERS						
Total Debt Service*	1,169,400	1,168,200	1,171,400	1,168,400	1,168,400	
Contingency	29,669	31,469	30,069	31,669	31,669	
Unappropriated Fund Balance	-	-	-	-	-	
TOTAL REQUIREMENTS	1,199,069	1,199,669	1,201,469	1,200,069	1,200,069	

*Appropriation Level

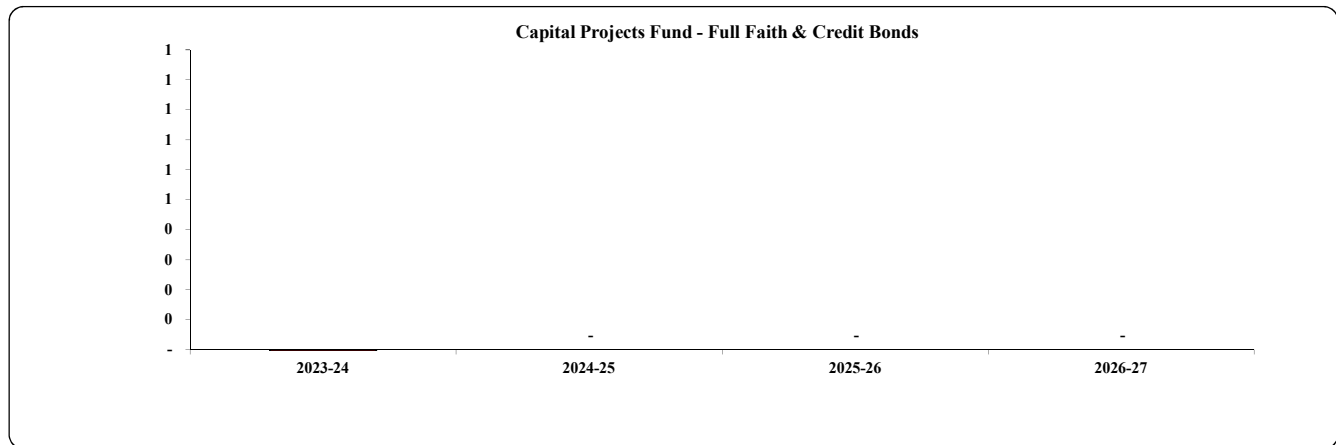


The District issued Full Faith & Credit Bonds in June 2021 to fund capital projects with a primary emphasis on seismically retrofitting the Oakdale Middle School. The issuance included \$19.75M par bonds and \$2.953M reoffering premium which netted \$22.5M for construction after cost of issuance. Debt Service is scheduled to be paid through Fiscal 2045-46. The budget reflects the principal and interest payments schedule defined at the issuance of the bonds. Revenue for payments on these bonds is funded through a transfer from the General Fund. At the beginning of FY26-27 there will be \$17.155M in principal due on the Full Faith & Credit Bonds.

Capital Projects Fund - 2021 Full Faith & Credit Bonds

Capital Projects	2023-24	2024-25	2025-26	2026-27	2026-27	2026-27
RESOURCES	Actual	Actual	Amended	Proposed	Approved	Adopted
Local Sources:						
Taxes						
Interest						
Other local sources						
Total Local Sources						-
State Sources:						
Beginning Fund Balance	(5,850)	-				
TOTAL RESOURCES	(5,850)	-	-			-
REQUIREMENTS						
Facilities Acquisition:						
Other OBJECTS	(5,850)	-	-			-
Total Facilities and Acquisition*	(5,850)	-	-			-
Other Uses:						
Bond Cost of Issuance						
Contingency	-	-	-			-
Unappropriated Fund Balance	-	-	-			-
TOTAL REQUIREMENTS	(5,850)	-	-			-

*Appropriation Level

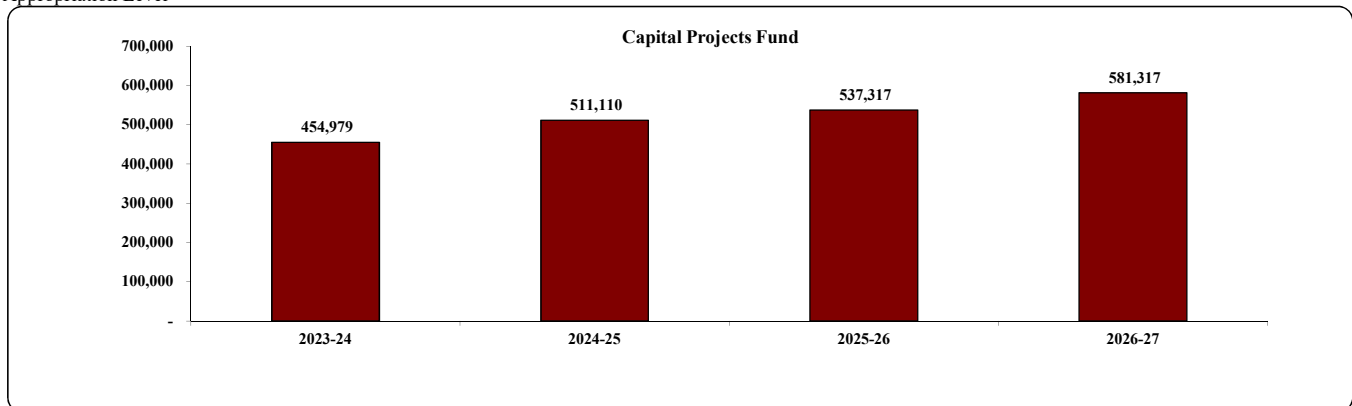


The District issued \$22.5M of Full Faith and Credit Bonds net of premium that was primarily used to remodel the Oakdale Middle School which opened in fall of 2023. After cost of issuance net proceeds were \$22.5M. The District used \$17.5 M of these bond proceeds along with \$13.7M of ESSER III funds for a total of \$31.2M to remodel the Oakdale Middle School. Most of the remaining \$4.958 M of bond was used to replace the track lights, underground utilities, and upgrade seating at Spiegelberg Stadium.

General Obligation Capital Projects Fund

Capital Projects	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
RESOURCES						
Local Sources:						
Taxes	-	-	-	-	-	-
Interest	30,830	31,000	12,000	30,000	30,000	
Other local sources	24,090	25,131	20,000	24,000	24,000	
Total Local Sources	54,920	56,131	32,000	54,000	54,000	
Beginning Fund Balance	400,059	454,979	505,317	527,317	527,317	
TOTAL RESOURCES	454,979	511,110	537,317	581,317	581,317	
REQUIREMENTS						
Facilities Acquisition & Construction		5,793	10,000	350,000	350,000	
Contingency	454,979	505,317	527,317	231,317	231,317	
Unappropriated Fund Balance	-	-	-	-	-	
TOTAL REQUIREMENTS	454,979	511,110	537,317	581,317	581,317	

*Appropriation Level



Bond funded construction was completed in FY12-13. This fund holds a note receivable from Madrone Trail Charter School for the West Side School sale because bond funds were used to make improvements at West Side School prior to the sale to Madrone Trail. The note receivable started in 2010 and has a twenty year term that runs through 2030. The balance of the note receivable at the beginning of FY26-27 is approximately \$0.13M. The budget includes the collection of interest on the note.

\$0.35M will be appropriated from this account to fund the stage rigging replacement project at Oakdale Middle School, which is as follows: The stage curtain supports and rigging are over 40 years old and have been flagged as needing updates and/or replacement during a recent inspection. This project would allow MSD to hire a contractor to add new supports above the stage and replace the rigging with newer safer equipment.

Health Insurance Fund

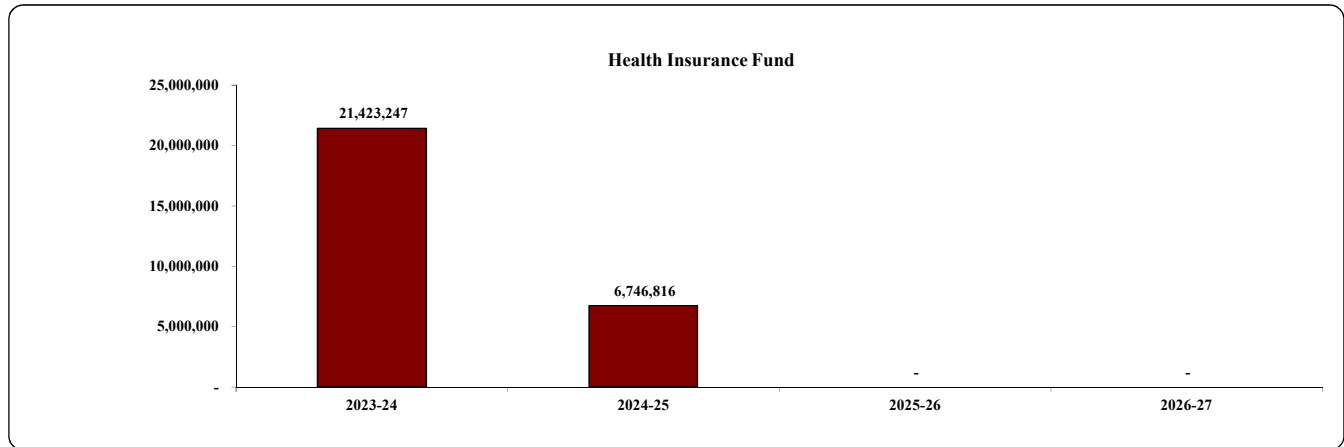
Health Insurance	2023-24 Actual	2024-25 Actual	2025-26 Amended	2026-27 Proposed	2026-27 Approved	2026-27 Adopted
RESOURCES						
Local Sources:						
Interest	-					
Services Provided	19,513,831	4,602,212	-			
Transfers in From Other Funds	-	1,133,650				
Total Local Sources	19,513,831	5,735,862	-			
Beginning Fund Balance	1,909,416	1,010,954	-			
TOTAL RESOURCES	21,423,247	6,746,816	-			

REQUIREMENTS

Support Services:

Salaries and Wages	37,865	8,734				
Employee Benefits	14,943	1,604				
Purchased Services	3,021,847	1,019,072	-			
Purchased Services - Claims	17,323,552	5,717,406	-			
Supplies/Dues/Fees	14,085					
Total Support Services*	20,412,293	6,746,816	-			
Contingency	1,010,954	-	-			
Unappropriated Fund Balance	-					
TOTAL REQUIREMENTS	21,423,247	6,746,816	-			

*Appropriation Level



The self funded health insurance fund ended providing healthcare to District employees 9/30/2024. Healthcare is now purchased from the Oregon Educators Benefit Board (OEBB).

Trust and Agency Funds - Student Scholarships

Scholarships	2023-24	2024-25	2025-26	2026-27	2026-27	2026-27
	Actual	Actual	Amended	Proposed	Approved	Adopted
RESOURCES						
Local Sources:						
Interest	19,767	22,830	20,000	20,000	20,000	
Contributions	200,201	191,937	215,000	215,000	215,000	
Other Local Sources	-	-	-	-	-	
Total Local Sources	219,968	214,767	235,000	235,000	235,000	
Beginning Fund Balance	462,890	491,594	529,222	479,222	479,222	
TOTAL RESOURCES	682,858	706,361	764,222	714,222	714,222	

REQUIREMENTS

Instruction:

Expenses	191,264	177,139	285,000	285,000	285,000	
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Other - Transfers Out

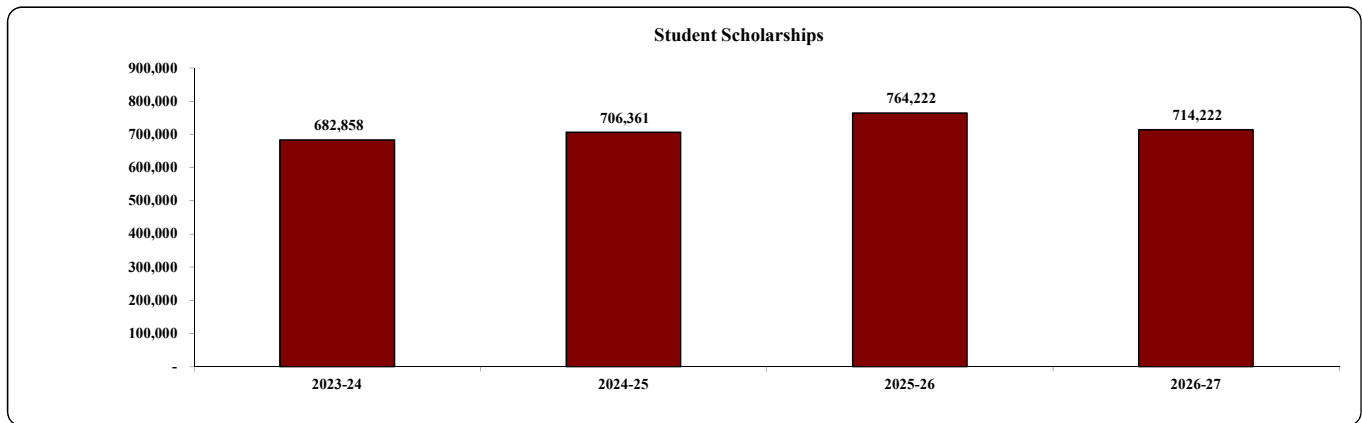
Other Uses:

Contingency	491,594	529,222	479,222	429,222	429,222	
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Unappropriated Fund Balance

TOTAL REQUIREMENTS	682,858	706,361	764,222	714,222	714,222	
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*Appropriation Level



The District has three scholarship funds for graduating seniors. These funds are donated by outside agencies such as the Touvelle Foundation, Kiwanis, Medford Rotary, and Carpenter Foundation. Some scholarships have been set up in memory of past students and teachers. The donors normally set the amount per award and the specific criteria, which can be financial need, GPA, post-secondary field of study, etc. These funds are administered by District employees and the student scholarship applications are reviewed by a committee at each school.

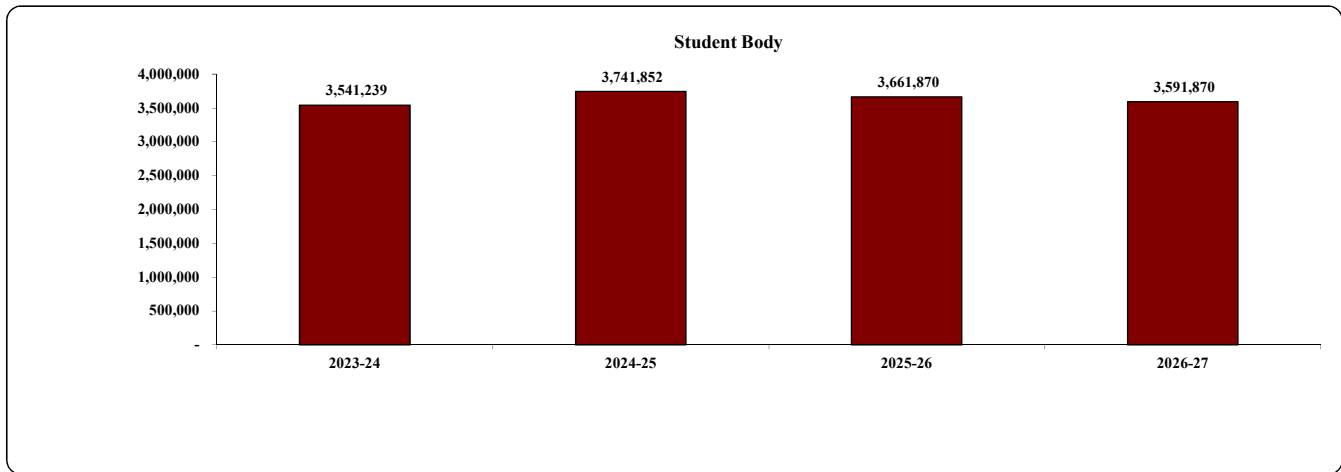
Trust and Agency Funds - Student Body

Student Body	2023-24	2024-25	2025-26	2026-27	2026-27	2026-27
RESOURCES	Actual	Actual	Amended	Proposed	Approved	Adopted
Local Sources:						
Interest	67,476	70,309	12,361	30,000	30,000	
Extra-Curricular Activities	1,626,044	1,863,528	1,800,000	1,800,000	1,800,000	
Other	59,999					
Total Local Sources	1,753,519	1,933,837	1,812,361	1,830,000	1,830,000	
Beginning Balance	1,787,720	1,808,015	1,849,509	1,761,870	1,761,870	
TOTAL RESOURCES	3,541,239	3,741,852	3,661,870	3,591,870	3,591,870	

REQUIREMENTS

Instruction:

Elementary Extra-Curricular	269,178	244,836	350,000	300,000	300,000	
Middle School Extra-Curricular	151,601	182,721	225,000	200,000	200,000	
High School Extra-Curricular	1,312,444	1,464,786	1,325,000	1,475,000	1,475,000	
Total Instruction	1,733,224	1,892,343	1,900,000	1,975,000	1,975,000	
Contingency						
Due to Students	1,808,015	1,849,509	1,761,870	1,616,870	1,616,870	
TOTAL REQUIREMENTS	3,541,239	3,741,852	3,661,870	3,591,870	3,591,870	



The purpose of the Student Body Fund is to account for monies raised by the school's students and/or parents to be used for student needs. These funds are controlled by the student body and not the District. The District performs an agency oversight role for these funds. The majority of the accounting for this fund is completed by the District office, with direction from the individual schools. The student body funds are included in the annual financial audit.

Supplemental Information



Revenue Sources

The District receives revenue from two primary sources: State aid and ad valorem taxes. Approximately 70 percent of the District's General Fund is provided by the state and about 25 percent is generated from tax collections. The balance of General Fund revenues are from fees, interest earnings, grants, and other miscellaneous sources.

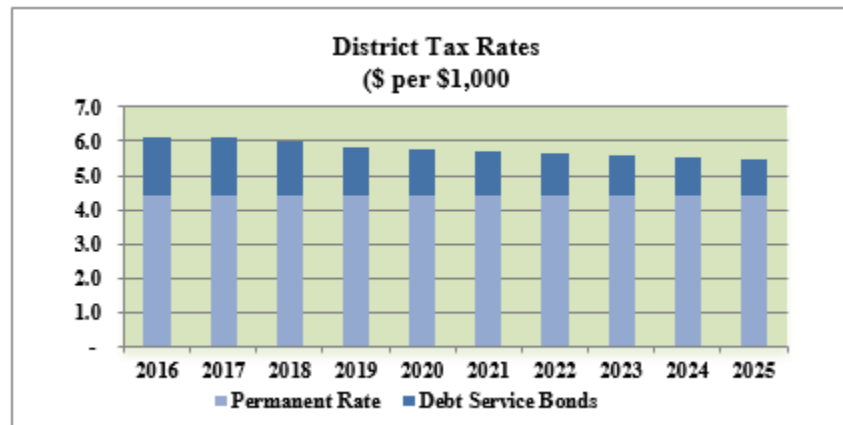
Property Taxes

Most local governments, including Medford School District, have permanent authority to levy taxes for operations. Public school system taxes are limited to \$5 per \$1,000 of the taxable Real Market Value of property. The District's permanent tax rate is \$4.4123 per \$1,000 of assessed valuation. The law allows districts to increase tax revenue through a voter approved Local Option Levy; however, Medford School District has never made such a request of its voters.

In addition, districts are allowed to seek voter authorization to issue general obligation bonds for the purpose of funding capital construction projects. In November 2006, voters authorized the District to issue \$188.9 million in general obligation bonds.

District Property Tax Rates
(Rates per \$1,000 of Assessed Value)

Fiscal Year	General Tax Permanent Rate (\$5 Limit)	Local Option	General Obligation Debt Service Bonds	Total District Tax Rate
2025	4.4123	-	1.0789	5.4912
2024	4.4123	-	1.1238	5.5361
2023	4.4123	-	1.17	5.5823
2022	4.4123	-	1.2163	5.6286
2021	4.4123	-	1.2731	5.6854
2020	4.4123	-	1.3335	5.7458
2019	4.4123	-	1.4328	5.8451
2018	4.4123	-	1.5691	5.9814
2017	4.4123	-	1.6858	6.0981
2016	4.4123	-	1.6836	6.0959
2015	4.4123	-	1.8590	6.2713



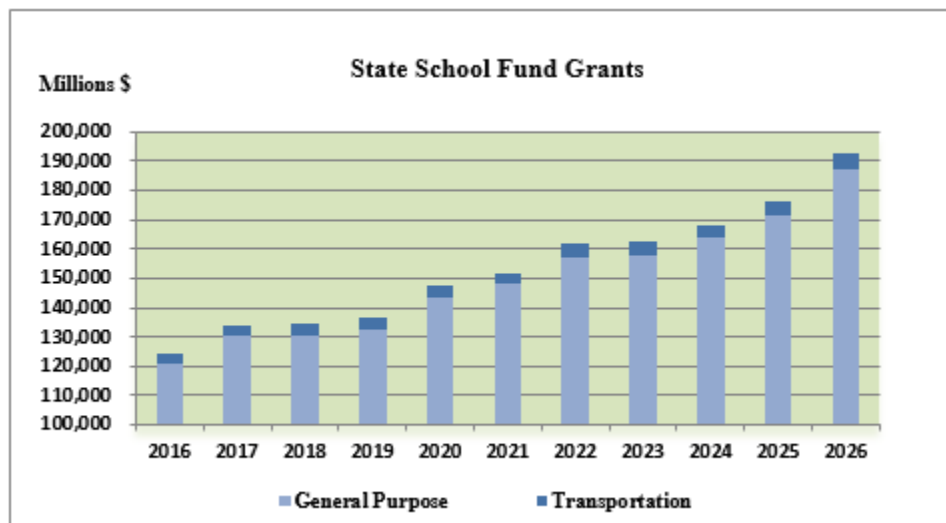
Revenue Sources

State School Fund

The State School Fund was created to distribute state aid to Oregon school districts. The objective was to provide equal funding for all districts. Local property tax collections are included in the formula. The grant allocated to each district is comprised primarily of a general purpose grant and a transportation grant. The transportation grant provides a 70 percent reimbursement for home-to-school and instructional field trip transportation costs.

The Oregon Department of Education (ODE) provides estimates of state appropriations beginning in March prior to the beginning of a new fiscal year (July 1). Apportionments are re-estimated throughout the year and finalized in May of the following fiscal year.

Fiscal Year	General Purpose Grant	Transportation Grant	Total
2026	187,317,400	5,127,500	192,444,900
2025	171,490,933	4,515,000	176,005,933
2024	163,761,162	4,550,000	168,206,162
2023	157,895,255	4,550,000	162,095,255
2022	157,074,814	4,550,000	161,624,814
2021	148,530,970	2,985,500	151,516,470
2020	143,310,019	4,256,560	147,566,579
2019	132,467,200	4,075,750	136,542,950
2018	130,587,258	3,885,000	134,472,258
2017	130,313,369	3,780,000	134,093,369



Function Glossary – Medford School District 549C

STUDENT INSTRUCTION

1111 Elementary Programs (K-5)

All regular elementary school instructional programs for kindergarten through grade six. Includes staff, services, classroom supplies, and equipment.

1121 Middle School Programs (6-8)

All regular middle school instructional programs for students in grades seven through eight. Includes staff, services, classroom supplies, and equipment.

1122 Middle School Co-Curricular (6-8)

Advisor and coaching stipends, supplies, and equipment for extracurricular activities.

1131 High School Programs (9-12)

All regular high school instructional programs for students in grades nine through twelve. Includes staff, services, classroom supplies, and equipment.

1132 High School Co-Curricular (9-12)

Advisor and coaching stipends, supplies, and equipment for extracurricular activities.

1210 Talented and Gifted (TAG) Programs

Program services and supplies for students identified as talented or gifted.

1220 Special Education Self-Contained Programs & Other Specialized Supports: Multi-Age Positive Support (MAPS)

Provides instructional and direct services for students with disabilities who spend one-half or more of their time in a special education setting. Specialized supports are also provided to students with sensory impairments.

1221 Southern Oregon Education Service District

Provides specialized services and service providers, such as Braillists, Sign-Language Interpreters, Autism Consultants and STEPS classrooms for students with disabilities.

1227 Extended School Year Services

Services are provided to students who experience documented, undue regression in acquired skills, based on IEP goals, and require extended periods to recoup the skills.

1240 Special Education Self-Contained Programs & Other Specialized Supports: Focus on Choosing Useful Skills (FOCUS)

Provides instructional and direct services for students with disabilities who spend one-half or more of their time in a special education setting. Specialized supports are also provided to students with social, emotional and behavior impairments.

1250 ERC - Resource Rooms

Learning experiences outside the regular classroom for students with disabilities. Students receive specialized remedial instruction within these resource rooms.

1260 Early Intervention Childhood

Provides evaluation services for early childhood students younger than five years old.

1261 Early Intervening Services

Provides preventative academic and behavioral support to school age students not eligible for special education.

1283 Alternative Education Programs

Learning experiences for students who may be more successful in a non-traditional classroom setting. Includes instructional programs designed to meet the needs of students at risk of dropping out of school. District programs include the Juvenile Detention Center.

1285 Medford Online Academy School 9-12

The Medford School District offers an online program where students can work virtually with a certified teacher.

1286 Medford Online Academy School K-8**1288 Charter Schools**

Contracted learning experiences for students attending the District sponsored Madrone Trail, Logos, The Valley, and Kids Unlimited.

1291 English Language Learners (ELL)

Instructional activities designed to assist students who speak English as a second language. Includes staff, services, and classroom supplies.

1292 Teen Parent Program

Instructional program designed to accommodate the needs of teen parents. This program is located on the campus of North Medford High School. Includes staff, services, and classroom supplies.

1295 Homebound Program

Instructional program designed to assist students who are unable to attend a regular school setting. These students receive instruction at home, typically on a temporary basis.

1296 Homeschool

Homeschool Connection is being launched in the 25-26 school year. This program aims to partner with families and offer a hybrid model that supports at home distance learning

with a parent while providing families access to resources, materials, and personnel from the school.

1297 At-Risk Program

Instruction activities designed to assist students with risk factors that often affect the learning process.

1430 Summer School Program – High School (9-12)

Includes staff, supplies, and materials to operate summer school for high school students.

DIRECT STUDENT SUPPORT SERVICES

2112 Attendance Services

Attendance monitoring and record keeping.

2115 School Resource Officers

Activities associated with enhancing student safety. The District contracts with the City of Medford to provide School Resource Officers.

2121 Offices of the Deans (6-8)

Activities associated with directing and managing guidance services at middle schools.

2122 Counseling (9-12)

Includes staff, services, and materials used in counseling centers. Each traditional high school is assigned four counselors.

2134 Nursing

Nursing activities which are not instruction, such as health inspection, treatment of minor injuries and referrals for other health services.

2140 Psychological Services

Includes activities concerned with testing, interpreting results, and providing psychological services to students. Includes staff, services, travel and supplies.

2150 Speech and Audiology Services

Includes the identification, assessment, and treatment of students with impairments for speech, hearing and language.

2160 Occupational Therapy

A related service for students who are eligible for special education. The focus of support is fine and gross motor, and self-regulation skills.

2190 General Student Support Services

Direction and management of all student service programs, including special education, ELL and other at-risk programs.

2191 Student Wellness

The Student Wellness Department supports the student service areas directed toward students' overall health and wellness K-12. In the Medford School District we strive for ALL students to be ready and available for learning and we know that this starts with physical, emotional and mental wellbeing.

DIRECT STAFF SUPPORT SERVICES**2210 Improvement of Instruction - Media**

This function is for activities providing direction and management of educational media services used by teachers. Designed to assist instructional staff plan, develop, and evaluate the process of providing effective learning experiences for students.

2211 Instructional Development

Activities designed to assist teachers and administrators to effectively use adopted curriculum materials.

2212 Curriculum Development

This function support District initiatives for the improvement of instruction through ongoing curriculum development.

2221 Instructional Media Services

Direction and management of educational media services used by teachers. This includes hardware, software, printed materials, on-line and other distance learning resources.

2222 School Libraries

Includes staff, services, books, periodicals, technology, supplies and other resources for school media centers.

2223 Audiovisual Services

Includes materials, supplies, and equipment for multimedia services used by instructional and administrative staff.

2240 Instructional Staff Development

Activities designed to assist licensed and non-licensed staff in preparing and using district curriculum materials, the understanding of best teaching practices, and other strategies to improve instruction.

GENERAL SUPPORT SERVICES**2310 Board of Education**

Includes expenses for policy development, audits, legal services, elections, dues, liability insurance and other responsibilities of the governing body.

2320 Office of the Superintendent

Includes services, supplies, travel, postage, materials and staff to support the Superintendent's office.

2321 Communications

The communications office supports schools and students by coordinating communication with families, staff and our community.

2327 Teaching and Learning

This function provides the direction and management for all elementary and secondary education, instruction, and operations.

2329 Secondary Athletics

Direction and management of all secondary athletic programs.

2410 Offices of the Principals

Includes services, supplies, materials and staff to support the Principals and Assistant Principals at each school.

2521 Business Services

Direction, management and oversight for all district fiscal services, including accounting, audits, payroll, and budgets. Includes services, supplies, and staff to support the Fiscal Controller.

2529 Other Fiscal Services

Includes services, supplies and bank fees.

2542 Custodial

Includes services, supplies, equipment, materials, utilities and staff used to clean and operate all schools and auxiliary buildings.

2544 Maintenance Services

Includes services, supplies, equipment, materials, and staff necessary to maintain and repair all district schools, auxiliary buildings and grounds.

2545 Vehicle Maintenance

Includes services, supplies, and equipment needed to maintain all district-owned vehicles.

2546 Security Services

Includes a service contract with Sonitrol to provide security and safety of all district property.

2550 Student Transportation

Includes a service agreement with First Student to provide all home-to-school activity, and athletic transportation services.

2572 Purchasing/Distribution Services

Includes costs of services, supplies, staff, storage, delivery and equipment necessary to purchase, receive, control and distribute district goods.

2574 Printing and Publishing Services

Includes supplies, equipment, and staff used to print and publish district reports and instructional materials.

2640 Human Resource/Employee Services

Direction and management of all personnel and employee services. Includes services, supplies, advertising, software, and staff necessary for the recruitment, monitoring, placement and pay assignment of all employees. It also includes bargaining, administrative assistance, and contract management.

2661 Information Technology

Includes costs associated with computing, programming and data processing services.

2669 Network and Telecommunication Services

Includes services, supplies, equipment, software and staff necessary to design, install and maintain district network and telecommunication systems.

2700 Early Retirement Program

Includes costs associated with the supplemental early retirement program provided to qualified retirees.

OTHER SERVICES/FUNCTIONS (across other than General Fund Functions)**3120 School Lunch Match**

Required expenditures to qualify as district support necessary to participate in the National School Lunch program.

3360 Family Outreach

Includes outreach to strengthen school and home partnership as well as supports community school needs.

4150 Building Acquisition and Construction

Includes professional services, supplies, equipment and staff necessary for the purchase or construction of new facilities or building improvements.

4190 Other Facility Services

Costs for improvements to other district assets, such as grounds.

5110 Long-term Debt Service

Includes fees associated with the issuance of debt lasting more than 12 months.

5201 Transfer of Funds

Transactions with withdraw resources from one fund and place it into another fund for a specific purpose.

6110 Operating Contingency

Portion of budget not designated for a specific use, but appropriated for unforeseen and unanticipated needs.

7700 Unappropriated Fund Balance

An estimate of funds needed to maintain operations of the district from July 1 of the ensuing fiscal year and the time when sufficient new revenue becomes available. No expenditure shall be made from the unappropriated fund balance in which it is budgeted. It is reserved for use in the subsequent year.

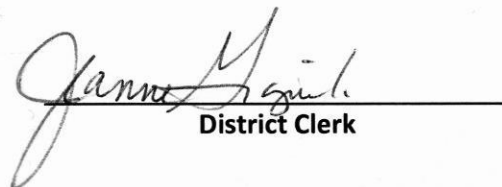
MEDFORD SCHOOL DISTRICT 549C
RESOLUTION APPROVING 2026-2027 BUDGET
May 14, 2026

BE IT RESOLVED that the Budget Committee of Medford School District 549C hereby approves the 2026-27 Budget in the following amounts:

General Fund		222,447,908
<i>District permanent tax rate</i>	\$ 4.4123	
<i>(per \$1,000 of assessed value)</i>		
Special Revenue Fund		72,019,400
Debt Service Fund		19,782,469
<i>Total tax to be levied for debt service</i>	\$ 12,900,000	
Capital Projects Fund		581,317
Health Insurance Fund		-
Trust and Agency Fund		4,306,092
Total 2026-27 Approved Budget - All Funds		<u>319,137,187</u>

Dated: May 14, 2026


Budget Committee Chair


District Clerk

MEDFORD SCHOOL DISTRICT 549C
2026-2027 Budget Approval Levels
May 14, 2026

General Fund		\$ 222,447,908
<i>District permanent tax rate</i>	<i>\$ 4.4123</i>	
<i>(per \$1,000 of assessed value)</i>		
Special Revenue Funds		
Federal Programs	10,043,834	
State and Local Programs	2,656,392	
PERS Reserve	1,662,400	
Physical Education Expansion (PEEK)	540,000	
Secondary Athletics	1,033,249	
Food Service	8,214,332	
Project Reserves	7,190,390	
NMHS Gym Rebuild	18,056,055	
Chromebook Reserve	3,773,918	
Measure 98	3,526,537	
Measure 99	307,448	
Literacy Grant	1,250,000	
Student Investment Act	13,764,846	
Total Special Revenue Fund		72,019,400
Debt Service Funds		
General Obligation School Bonds	13,149,256	
Pension Obligation Bonds	5,433,144	
2021 Full Faith & Credit Bonds	1,200,069	
Total Debt Service Fund		19,782,469
<i>Total tax to be levied for debt service</i>	<i>\$ 12,900,000</i>	
Capital Service Funds		
Capital Projects Fund	581,317	
Capital Service Funds		581,317
Health Insurance Fund		-
Trust and Agency Funds		
Student Body	3,591,870	
Student Scholarships Trust	714,222	
Total Trust and Agency Funds		4,306,092
Total 2026-27 Approved Budget - All Funds		\$ 319,137,187

A public budget hearing of the Board of Directors of the Medford School District 549C will be held on Thursday, June 11, 2026 at 6:00 p.m. at Oakdale Middle School at 815 S Oakdale Ave in Medford Oregon. The purpose of this meeting is to discuss the budget for the fiscal year beginning July 1, 2026 as approved by the Medford School District 549C Budget Committee. A summary of the budget is presented below. The final meeting for the adoption of the FY26-27 budget will be held on Thursday, June 25, 2025 at 6:00 pm at Oakdale Middle School. A copy of the budget may be inspected or obtained at the Business Services Office located at 815 S Oakdale Ave between the hours of 8:00 a.m. and 4:00 p.m. or online at www.medford.k12.or.us. This budget is for an annual budget period. This budget was prepared on a basis of accounting that is the same as the basis of accounting used during the preceding year.

Contact: Brad Earl

Telephone: 541-842-5007

Email: brad.earl@medford.k12.or.us

FINANCIAL SUMMARY - RESOURCES			
TOTAL OF ALL FUNDS	Amended Budget 2024-25	Amended Budget 2025-26	Approved Budget 2026-27
Beginning Fund Balance	36,023,508	38,336,455	29,429,640
Current Year Property Taxes, other than Local Option	59,787,315	61,981,755	63,492,730
Current Year Local Option Property Taxes			
Other Revenue from Local Sources	23,135,440	16,697,100	32,425,258
Revenue from Intermediate Sources	3,617,676	3,411,330	3,661,330
Revenue from State Sources	155,487,585	161,426,584	162,760,700
Revenue from Federal Sources	20,650,700	15,833,328	16,429,529
Interfund Transfers	10,915,000	12,498,000	9,038,000
All Other Budget Resources	1,722,580	1,900,000	1,900,000
Total Resources	\$311,339,802	\$312,084,552	319,137,187

FINANCIAL SUMMARY - REQUIREMENTS BY OBJECT CLASSIFICATION			
Salaries	94,066,326	99,362,242.94	101,708,753
Other Associated Payroll Costs	57,231,580	61,303,012	62,826,296
Purchased Services	53,703,922	57,181,991	59,190,523
Supplies & Materials	15,575,494	13,277,769	12,849,354
Capital Outlay	15,837,279	17,559,329	25,168,866
Other Objects (except debt service & interfund transfers)	5,586,053	2,298,707	2,577,557
Debt Service*	18,954,534	19,173,860	19,391,994
Interfund Transfers*	12,048,650	12,498,001	9,038,000
Operating Contingency	37,883,137	29,052,125	25,988,329
Unappropriated Ending Fund Balance & Reserves	452,826	377,515	397,515
Total Requirements	\$311,339,802	\$312,084,552	\$319,137,187

FINANCIAL SUMMARY - REQUIREMENTS AND FULL-TIME EQUIVALENT EMPLOYEES (FTE) BY FUNCTION			
1000 Instruction	138,392,439	147,231,523	150,279,788
FTE	965	979	967
2000 Support Services	81,516,786	79,511,353	81,933,083
FTE	402	397	389
3000 Enterprise & Community Service	7,481,206	7,546,176	7,472,482
FTE	3	3	3
4000 Facility Acquisition & Construction	14,609,731	16,693,999	24,277,866
FTE			
5000 Other Uses	31,003,184	31,671,860	28,429,994
5100 Debt Service*	18,954,534	19,173,860	19,391,994
5200 Interfund Transfers*	12,048,650	12,498,000	9,038,000
6000 Contingency	37,883,630	28,993,104	26,289,010
7000 Unappropriated Ending Fund Balance	452,826	436,537	454,963
Total Requirements	\$311,339,802	\$312,084,552	319,137,187
Total FTE	1,369.86	1,378.85	1,358.71

* not included in total 5000 Other Uses. To be appropriated separately from other 5000 expenditures.

STATEMENT OF CHANGES IN ACTIVITIES AND SOURCES OF FINANCING

General Fund

As with any budget, the development of this budget involves using estimates and making assumptions. Ultimately, the District understands that some of these assumptions may be required to be collectively bargained, and as such, readers of this document should understand that some of these assumptions may change. Some key assumptions include, but are not limited to, \$11.359 billion for the 2025-27 Oregon K-12 budget, high cost sped to be reimbursed at a minimum of 20-25%, SIA funded at Continuing Service Level Estimate, a 4.25% Cost of living Adjustment (COLA) for all employees; step wage increases for those employees who qualify, and purchasing healthcare from the Oregon Educators Benefit Board (OEBB) for the full fiscal year.

Total Proposed FTE across all funds of 1,358.71 is down 20.13 FTE or 1.46% net from Current FTE of 1,378.84 due primarily to overall declining enrollment, partially offset by an increase in SpEd staffing/enrollment.

Special Revenue

Special Revenue Resources/Appropriations are projected at \$72.0M for FY26-27, an increase of \$7.3M (11.3%) from the FY25-26 Budget, mainly due to increased NMHS Gym Rebuild activity partially offset by lower Project Reserves activity and smaller variances among the other grants. See the following

Other Funds

Other funds are down -\$0.26M (-1%) due primarily to the natural decrease in the bond funds.

Summary - All Funds

The General Fund is the primary funding source for operational spending in the District. In the FY26-27 Budget, the General Fund represents 69.7% of all resources versus 71.1% in the FY25-26 Amended Budget. Total resources across all fund types for FY26-27 is \$319.1M vs \$312.1M in the FY25-26 Amended Budget, which is 7.0M, or 2.3% higher. This increase is primarily due to a \$7.32M rise in Special Revenue Funds, driven by a \$16.3M increase for the NMHS Gym Rebuild which is funded by insurance. This increase is partially offset by reduced project reserves due to no planned seismic upgrades in 2026-27 and the completion of the SMHS track and field and Innovation Academy upgrades.

The District is focused on providing academic rigor and relevance necessary for our students to achieve success. These strategies are designed to engage students across the spectrum and to fully prepare them for college, career, and life after graduation. For most students, our programs will help them obtain an industry certification, college credit or even an associate's degree along with their high school diploma.

PROPERTY TAX LEVIES

	2024-25	2025-26 (Budget)	2026-27 (Budget)
Permanent Rate Levy (Rate Limit \$4.4123 per \$1,000)	48,763,077	50,400,000	51,916,000
Local Option Levy			
Levy For General Obligation Bonds	\$12,900,000	\$12,900,000	\$12,900,000

STATEMENT OF INDEBTEDNESS

LONG TERM DEBT	Estimated Principal Debt Outstanding July 1, 2026	Estimated Debt Authorized, But Not Incurred on July 1, 2026
General Obligation Bonds	\$74,835,000	
Other Bonds (Pension)	\$5,140,000	
Other Borrowings	\$17,155,000	
Total	\$97,130,000	

Affidavit of Publication
STATE OF OREGON, COUNTY OF JACKSON

I, Charles Duncan, a citizen of the United State and a resident of the county aforesaid; I am over the age of eighteen years, and not part to or interested in the above-entitled matter. I am the principal clerk of the printer of

**TROGUE VALLEY
TIMES**

a newspaper of general circulation, published in the aforesaid county and state as defined by ORS 192.010 and ORS 192.020, that

Acct Name: MEDFORD SCHOOL DISTRICT-Accounts Payable

PO Number:

Legal Description: MEDFORD SCHOOL DISTRICT 549C MEDFORD OREGON NOTICE OF BUDGET COMMITTEE MEETING A PUBLIC MEETING NOTICE OF THE BUDGET COMMITTEE OF THE MEDFORD SCHOOL DISTRICT JACKSON COUNTY STATE OF OREGON ON THE BUD

a printed copy of which is hereto affixed was published in each regular and entire issue of the said newspaper and not in any supplement thereof on the following dates to wit:

4/22/26

I certify (or declare) under penalty of perjury that the foregoing is true and correct.

Charles Duncan

Signature

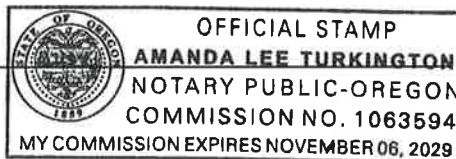
Dated at Medford, Oregon, this 22nd day of April, 2026

AdName: 514932

State of Oregon, County of Jackson

Subscribed and Sworn to before me this 22nd day of April, 2026 by

Amanda Lee Turkington
Notary Public for Oregon



No. _____

in the _____ Court of the

**STATE OF OREGON
for the
COUNTY OF JACKSON**

AFFIDAVIT OF PUBLICATION

Filed. _____

By _____
From the office of _____

Attorney for _____

**MEDFORD SCHOOL
DISTRICT 549C
Medford, Oregon
NOTICE OF BUDGET
COMMITTEE MEETING**

A public meeting notice of the Budget Committee of the Medford School District, Jackson County, State of Oregon, on the budget for the fiscal year July 1, 2026 to June 30, 2027. All meetings will take place at the Oakdale Middle School, 815 S. Oakdale Ave, Medford, OR at 6:00 PM. The first Budget Committee meeting of the Board will take place on Thursday, April 30, 2026. The Superintendent will deliver the budget message, and the Budget Committee will elect officers and receive the budget document. The second Budget Committee meeting of the Board to approve the proposed budget will take place on Thursday, May 14, 2026. If needed, a third Budget Committee meeting of the Board will take place on Thursday, June 4, 2026. A public hearing to consider citizen comment will take place at the School Board meeting on Thursday, June 11, 2026. The final budget meeting to adopt the FY26-27 budget will take place on Thursday, June 25, 2026. The public is welcome to attend all meetings. Notice of these meetings are also published on our website at

www.medford.k12.or.us.

Jeanne Grazioli
Superintendent



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191

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MEDFORD SCHOOL DISTRICT 549C
RESOLUTION ADOPTING 2026-2027 BUDGET
June 18, 2026

BE IT RESOLVED that the Board of the Medford School District 549C hereby adopts the budget for fiscal year 2026-27 in the total amount of : \$319,137,187. This budget is now on file at 815 South Oakdale Avenue in Medford, Oregon.

General Fund		\$ 222,447,908
<i>District permanent tax rate</i>	<i>\$</i>	<i>4.4123</i>
<i>(per \$1,000 of assessed value)</i>		

Special Revenue Funds		72,019,400
------------------------------	--	-------------------

Debt Service Funds		
Debt Service		12,790,450
Contingency		358,806
Debt Service		5,433,144
Contingency		-
Debt Service		1,168,400
Contingency		31,669
		19,782,469

<i>Total tax to be levied for debt service</i>	<i>\$</i>	<i>12,900,000</i>
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Capital Projects Fund		
Facilities Acquisition and Construction		350,000
Contingency		231,317
		581,317

Trust and Agency Funds		4,306,092
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Total 2026-27 Adopted Budget - All Funds		<u>\$ 319,137,187</u>
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Motion: _____ **Second:** _____

Attest: _____ **Chair, Board of Directors**

Superintendent

Dated this 18th day of June, 2026.

MEDFORD SCHOOL DISTRICT 549C
RESOLUTION MAKING APPROPRIATIONS 2026-2027 BUDGET
6/18/2026

BE IT RESOLVED that the amounts shown below are hereby appropriated for the fiscal year beginning July 1, 2026, for the following purposes:

General Fund

Instruction	\$ 121,701,906
Support Services	74,107,315
Facilities	1,900,000
Transfers	8,488,000
Contingency	16,250,687
Total General Fund	222,447,908

Special Revenue Funds

Instruction	26,675,017
Support Services	7,826,763
Community Services	7,472,482
Facilities Acquisition and Construction	22,027,866
Transfers	550,000
Contingency / Restricted Funds	6,992,308
Fund Balance/Unappropriated Fund Balance	474,963
Total Special Revenue Funds	72,019,400

Debt Service Funds

General Obligation School Bonds	12,790,450
Contingency	358,806
Pension Obligation Bonds	5,433,144
Contingency	-
2021 Full Faith & Credit Bonds	1,168,400
Contingency	31,669
Total Debt Service Funds	19,782,469

Capital Projects Fund

Facilities Acquisition and Construction	350,000
Capital Projects Fund	231,317
Total Capital Funds	581,317

Trust and Agency Funds

Instruction	2,260,000
Contingency / Restricted Funds	2,046,092
Total Trust and Agency Funds	4,306,092

**MEDFORD SCHOOL DISTRICT 549C
RESOLUTION MAKING APPROPRIATIONS 2026-2027 BUDGET
6/18/2026**

Total APPROPRIATIONS - All Funds	<u><u>319,137,187</u></u>
TOTAL ADOPTED BUDGET	<u><u>\$ 319,137,187</u></u>

Motion: _____ Second: _____

Attest: _____
Superintendent Chair, Board of Directors

Dated this 18th day of June, 2026.

MEDFORD SCHOOL DISTRICT 549C
RESOLUTION TO IMPOSE AND CATEGORIZE TAXES
2026-2027 Tax Year
6/18/2026

BE IT RESOLVED that the following ad valorem property taxes are hereby imposed upon the assessed value of all taxable property within the district for tax year 2026-2027:

- (1) In the amount of \$51,916,000 OR at the rate of \$4.4123 per \$1,000 of assessed value for permanent rate tax;
- (2) In the amount of \$_____ OR at the rate of \$_____ per \$1,000 of assessed value for local option tax; (N/A)
- (3) In the amount of \$12,900,000 for debt service on general obligation bonds.

RESOLUTION CATEGORIZING THE TAX

BE IT RESOLVED that the taxes imposed are hereby categorized for purposes of Article XI section 11b as:

Subject to the Education Limitation

Permanent Rate Tax.....\$51,916,000 OR \$4.4123/\$1000
Local Option Tax.....\$_____ OR \$_____/ \$1000 (N/A)

Excluded from Limitation

General Obligation Bond Debt Service.....\$12,900,000

The above resolution statements were approved and declared adopted on June 18, 2026

Motion: _____

Second: _____

Attest: _____
Superintendent

Chair, Board of Directors

Dated this 18th day of June, 2026.

EXECUTIVE SUMMARY

Meeting Date:	June 18, 2026
Agenda Item:	The Valley School of Southern Oregon Charter Contract Approval
Item Type:	Board Action Item
Administrator:	Todd Bloomquist
Objective:	Approval of The Valley School of Southern Oregon Charter Contract

Background:

The Valley School of Southern Oregon (TVS) has requested the District renew their charter with adjustments to consider as outlined in their renewal request letter received on December 29, 2025.

The District responded on December 30, 2025 of receipt of their request and formally responded on January 16, 2026, requesting more clarification/information and notifying that some of the requests will require further discussion. TVS responded to the District on February 6, 2026 at the on-site visit with further clarifications. On March 18, 2026, the subcommittees of each board met to discuss the changes to the contract. On April 14, 2026, the Medford School Board subcommittee met to discuss the changes to the charter contract.

A public hearing was held on February 19, 2026. According to [OAR 581-026-0400](#) the District must notify TVS of the decision to renew the charter contract or state the reasons in writing denying the renewal of the contract within 30 days of the public hearing.

An annual on-site visit was conducted on February 6, 2026.

Additional Materials:

[Draft Contract with Changes](#)

[Final Draft 2026-2031 The Valley School of Southern Oregon Charter Contract](#)

Recommendation:

Approve the updated Valley School of Southern Oregon Charter contract agreement.

Suggested Motion:

"I move to approve The Valley School of Southern Oregon Charter School contract for 2026-2031, to be effective July 1, 2026."

Charter Contract Between
Valley School of Southern Oregon &
Medford School District 549C
July 1, 2026~~1~~- June 31, 2031~~26~~

CHARTER SCHOOL CONTRACT	5
RECITALS	5
CONTRACT	6
1. Grant of Renewed Charter	6
2. Conditions Precedent to Grant of Renewal Charter	6
3. Effective Date	6
4. Educational Program	6
A. Age and Grade Range	6
B. Curriculum	6
C. Student Assessment/Graduation Requirements	7
D. Access to District Programs/Extracurricular Activities	8
E. Records	9
F. Non-religious and Non-discrimination	9
G. Open Enrollment	9
H. Notices for Enrollment and Withdrawal of Non-Resident Students	10
I. Student Attendance, Conduct and Discipline	11
J. Education of Special Populations	12
K. Tuition and Fees	14
L. Student Welfare and Safety	15
M. School Year; School Day; Hours of Operation	15
N. Alternative Education Model	16
5. Evaluation of Student Performance and Procedures for Corrective Action	16
6. Economic Plan, Budget and Annual Audit	17
A. Funding	17
B. Budget	18
C. Financial Records, Audits and Accounting Reports	18
D.	21
7. Building and Facilities	21
8. Governance and Operation	21
A. Corporate Status	22
B. Non-religious, Non-sectarian Status	22
C. Non-discrimination	22
D. Public Meeting and Public Records	22
E. Operational Powers	22
F. Third Party Contracts	23
G. Annual Report and Review	24
H. Term	24
I. Termination	25
J. Dissolution	26
K. Property Inventory Control	26
9. Employment Matters	27
B. Teacher and Administrator Licensure/Registration Requirements	28
C. The Valley School Responsibilities	28

10. Insurance and Legal Liabilities	29
A. Insurance	29
B. Legal Liabilities	30
C. Waiver	31
D. Full Faith and Credit	31
E. Indemnification	31
F. District Disclaimer of Liability	32
G. ADA/§504 Obligations	33
H. Transportation	33
11. Renewal of Contract	33
12. Miscellaneous Provisions	35
A. Entire Agreement	35
B. Governing Law	35
C. Assignment	35
D. Terms and Conditions of Application	36
E. Conflict between Application and Contract	36
F. District Liaison	36
G. Amendment	36
H. Notice	36
I. Definition of Business Day	36
J. Address of Parties for Purpose of Written Notice	37
K. No Waiver	37
L. Dispute Resolution	37
M. Severability	38
N. Delegation	38
O. Prior Actions	39
P. Attorney Fees	39
Q. The Valley School Authority to Enter Into Contract	39

~~NOTE: Below is the old TOC the new, interactive one is above. If agreed, the below TOC can be deleted for accurate pagination.~~

~~Table of Contents~~

CHARTER SCHOOL CONTRACT	6
1. Grant of Renewed Charter	7
2. Conditions Precedent to Grant of Renewal Charter	7
3. Effective Date	7
4. Educational Program	8
A. Age and Grade Range	8
B. Curriculum	8
C. Student Assessment/Graduation Requirements	9
D. Access to District Programs/Extracurricular Activities	9
E. Records	10

F. Non-religious and Non-discrimination	11
G. Open Enrollment	11
H. Notices for Enrollment and Withdrawal of Non-Resident Students	12
I. Student Attendance, Conduct and Discipline	13
J. Education of Special Populations	13
K. Tuition and Fees	16
L. Student Welfare and Safety	16
M. School Year; School Day; Hours of Operation	17
N. Alternative Education Model	17
5. Evaluation of Student Performance and Procedures for Corrective Action	17
6. Economic Plan, Budget and Annual Audit	19
A. Funding	19
B. Budget	20
C. Financial Records, Audits and Accounting Reports	20
7. Building and Facilities	23
8. Governance and Operation	23
A. Corporate Status	23
B. Non-religious, Non-sectarian Status	24
C. Non-discrimination	24
D. Public Meeting and Public Records	24
E. Operational Powers	24
F. Third Party Contracts	25
G. Annual Report and Review	25
H. Term	26
I. Termination	26
J. Dissolution	28
K. Property Inventory Control	28
9. Employment Matters	29
A. Criminal Background checks, Sexual Conduct Clearance, and Pre-employment Drug Screen.	29
B. Teacher and Administrator Licensure/Registration Requirements	
C. The Valley School Responsibilities	30
10. Insurance and Legal Liabilities	31
A. Insurance	31
B. Legal Liabilities	31
C. Waiver	33
D. Full Faith and Credit	33
E. Indemnification	33
F. District Disclaimer of Liability	34
G. ADA/§504 Obligations	34

H. Transportation	35
Renewal of Contract	35

CHARTER SCHOOL CONTRACT

THIS CONTRACT dated effective as of July 1, 2024¹⁶ is made and entered into by and between the Medford School District 549C ("District") and The Valley School of Southern Oregon, an Oregon nonprofit corporation ("The Valley School").

RECITALS

WHEREAS, the Oregon Legislature has enacted ORS Chapter 338 for certain purposes enumerated in that chapter; and

WHEREAS, the District and Valley School are currently parties to a charter school contract ~~with an effective date of July 1, 2018 and which has a term of July 1, 2018 to June 30, 2021~~, and

WHEREAS, in December 2020⁰⁵, a renewal request was submitted by Valley School to the District for continuation of The Valley School as a charter school to operate within District; and

WHEREAS, the District School Board held a public hearing on ~~February 19~~ March 4, 2024¹⁶ on the provisions of the proposal in accordance with the ORS Chapter 338 and evaluated the criteria set forth in ORS Chapter 338; and

WHEREAS, THE RESOLUTION ADOPTED by the District Board on ~~March 4, 2024~~ February 19, 2026 approved the renewal of the charter contingent upon the negotiation and execution of a contract acceptable to The Valley School and District; and

WHEREAS, this contract between The Valley School and the District will constitute the full and complete agreement between the parties regarding the governance and operation of The Valley School; and

WHEREAS, the parties desire that The Valley School be authorized to operate and conduct its affairs in accordance with the terms of this agreement and ORS Chapter 338; and

WHEREAS, The Valley School continues to be an established non-profit organization under the laws of the State of Oregon, exempt under 501(c)(3) of the Internal Revenue Code, and is not associated with a nonpublic sectarian school or a religious institution, or otherwise religious based;

NOW, THEREFORE, in consideration of the foregoing recitals and the mutual understandings, releases, covenants and payments herein described, the parties agree as follows:

CONTRACT

1. Grant of Renewed Charter

The Valley School is granted, in accordance with ORS Chapter 338 and the terms and conditions of this contract, a renewed charter to operate a single public charter school located within the boundaries of the District as described herein.

2. Conditions Precedent to Grant of Renewal Charter

In order for The Valley School to continue to operate as a public charter school sponsored by the District under this charter contract, The Valley School shall remain in compliance with all provisions of the existing charter contract and with all state and federal laws governing public charter schools for the remainder of the 2025-2026 school year.

3. Effective Date

Provided that the conditions set forth in Section 2, above, are met, this contract shall commence on July 1, 2024 and shall expire on June 30, 2031, unless sooner terminated pursuant to the provisions herein.

4. Educational Program

A. Age and Grade Range

- (i) ~~Beginning with the commencement of the 2021-2022 school year, and continuing throughout each school year thereafter during the term of this Agreement,~~ The Valley School shall provide instruction to students in grades 6-8. The maximum enrollment shall be an annual average of 128 students.
- (ii) During the term of this charter contract TVS will have the option, upon 180 days notice to the District, to request a change to the age range configuration to include either grade 5 or grade 9 commencing in the next subsequent school year.

B. Curriculum

- (i) District agrees to waive its curricular requirements, to the extent permitted by Oregon law, but subject to the provisions of this Section 4.B. (i) The Valley School shall have the authority and responsibility of designing and implementing its educational program, subject to the conditions of this contract, in a manner which is consistent with state law.
- (ii) The educational program, pupil performance standards and curriculum designed and implemented by The Valley School shall be aligned to and meet or exceed any content standards adopted by the State of Oregon and shall be designed to enable each pupil to achieve such standards.

- (iii) The Valley School agrees to comply with all state requirements concerning academic content areas as defined in ORS 329.045.
- (iv) The Valley School core curriculum materials offered to students/families will meet Oregon State Standards. The Valley School has provided to the District an outline of its core curriculum and educational program ~~for the 2021-2022 school year, and will~~ provide similar outlines on an annual basis, by no later than October 31st of each successive school year.
- (v) The Valley School shall adhere to the philosophy and mission, instructional program, goals and objectives, and curriculum as set forth in its application, ~~the terms of which are incorporated herein by reference except as may otherwise be amended by the terms of this~~ contract, and any fundamental changes thereto shall require the prior written consent and approval of the District. A “fundamental change” is defined as changing the academic focus of The Valley School, its philosophy or mission, or adopting a curriculum that does not meet District or state standards. The District, in its sole discretion, may identify and/or approve or disapprove of any such fundamental change.
- (vi) The Valley School shall maintain and publish to their website and prominently display at the school a written policy for resolving complaints against The Valley School, including complaints regarding curriculum. A current copy of the policy shall be provided to the District prior to July 1, each year and revised copies will be provided to the District each time any changes are made to the policy.

C. Student Assessment/Graduation Requirements

- (i) All students enrolled and attending The Valley School shall participate and take part in all mandatory statewide assessments developed by the Oregon Department of Education under ORS 329.485, as well as any assessment developed by the Oregon Department of Education, the United States Department of Education or the Oregon Legislature and required of public schools to implement the Every Student Succeeds Act(ESSA) assessment requirements. All costs associated with administering and scoring the required assessments, as well as training, shall be paid for by The Valley School. If any of the assessments described herein are discontinued, the parties shall mutually agree on the assessment tool to be utilized by The Valley School to determine the student performance standards for The Valley School’s students.
- (ii) The Valley School will conduct ~~interim assessments~~ ~~inReady~~ reading and math ~~assessments~~ for all 6-8th graders according to the MSD assessment calendar.
- (iii) The Valley School may utilize additional normed measures to gain periodic information on student academic program and provide those

reports to the District ~~upon request at the annual review.~~

D. Access to District Programs/Extracurricular Activities

- (i) The Valley School students are allowed to participate, in compliance with state law, in interscholastic activities that are (a) offered by District, (b) not part of The Valley School's comprehensive instructional program, and (c) for which District participates in and is sanctioned by the Oregon School Activities Association ("OSAA"). The Valley School shall pay District a fee equal to five percent (5%) of the ~~of~~ District's General Purpose Grant per ADMw, as calculated under ORS 327.013, for each student that participates in a District interscholastic activity during any given school year. An additional 5% of the ADMw will be charged to attend a class required for participation in athletics or activities. The fee is per student, per year, regardless of the number of interscholastic activities the student may participate in during the year and is payable within sixty (60) days of when the student is added to the roster of an interscholastic activity. In order to be eligible to participate, or continue to participate, in such interscholastic activities, students must adhere to state laws, District Board policies, and all other regulations and rules concerning conduct and discipline, including but not limited to OSAA rules and regulations, District eligibility requirements (such as minimum grade point average, attendance and code of conduct), and must demonstrate the requisite level of skill, as determined by the head coach, to make the team.
- (ii) The Valley School will provide information regarding student performance and conduct to District in a timely manner and on a recurring basis to confirm continuing student eligibility. In addition to the fee to be paid by The Valley School for its students participating in interscholastic activities under this paragraph, students are also subject to any "pay to play" participation fees charged by District.
- (iii) Upon approval of the District, and provided that space and materials are available, The Valley School students will be allowed to participate in District programs within their resident attendance area school, such as physical education, instrumental and vocal music offerings or other selected options. Students must adhere to state laws, Board policies, regulations and rules concerning conduct and discipline and are subject to any fees. District will retain the ADMw for any classroom services described in this paragraph, as allowed by law.
- (iv) District is not responsible for providing any transportation to or from The Valley School for students that may be participating in interscholastic or District programs as provided in this Section 4.D.
- (v) The District will accommodate enrollment requests for specific courses not available at Valley such as advanced math, as space and resources allow. District will retain the ADMw for any classroom services described in this paragraph, as allowed by law.

E. Records

- (i) The Valley School shall comply with all record keeping requirements of state and federal law pertaining to student records and shall cooperate with the District by providing any reports or records to the District, as necessary, to meet the District's reporting obligations to the Oregon Department of Education or the U.S. Department of Education. Student records include, without limitation, immunization records, class schedules, records of academic performance, disciplinary actions, attendance, documents required pursuant to the statewide assessment system under ORS 329.485, and any documents required under federal and state laws regarding the education of students with disabilities.
- (ii) The Valley School shall comply with all applicable federal and state laws concerning the maintenance, retention and disclosure of student records, including, without limitation, the Oregon Public Records Law.
- (iii) The Valley School shall maintain up-to-date student records including enrollment, attendance and behavior in the District 549C Student Information System (SIS). The Valley School will be included in the District's membership of SIS program and therefore will not be financially responsible for the cost. District will provide training to The Valley School for SIS, but shall not be responsible for obtaining or upgrading any computers or other hardware to enable The Valley School to access or use SIS.

F. Non-religious and Non-discrimination

- (i) The educational program of The Valley School shall be non-religious and non-sectarian. The Valley School shall conform to all state and federal statutory and constitutional provisions prohibiting discrimination and shall not discriminate against any student or staff member on the basis of race, creed, color, sex, national origin, religion, ancestry, disability, marital status, sexual orientation, **gender identity**, or political beliefs and/or affiliations.
- (ii) The Valley School will take affirmative action to recruit a diverse student body. By January 31 of each school year, The Valley School will submit to the District a plan for school promotion and recruiting. This plan will identify planned promotion and/or recruiting activities and will include content that will be included in printed materials. In addition, by May 1 of each school year The Valley School will submit to the District a demographic report of the currently enrolled students. Demographic information should be included in the report in the areas of race/ethnicity, students with disabilities, economically disadvantaged, TAG, ELL, etc.

G. Open Enrollment

- (i) Student enrollment in The Valley School shall be voluntary. All students, including students with disabilities, who reside in the District and meet legal age requirements applicable to a grade level will be eligible for enrollment if space is available.
- (ii) As provided in ORS 338.125(2), if space is available, The Valley School may admit students who do not reside in the District. Within

each phase of the enrollment process, preference will be given to residents of the District.

- (iii) As provided in ORS 338.125(3)(b), The Valley School may give admissions preference to 1) students who were enrolled in the prior year, unless expelled and 2) applicants who have siblings who are presently enrolled and who were enrolled in the prior year. Any additional preferences not specifically outlined in laws governing charter school operation in the State of Oregon will require the submission of a waiver approved by the Oregon State Board of Education prior to implementation of said preference for admission status.
- (iv) Maximum school enrollment shall be **no more than 1208** students.
- (v) If the maximum enrollment set forth in Section 4.G.iv is met, a lottery process will be implemented conforming to ORS Chapter 338. Using the lottery process at the end of each enrollment period (as defined in the enrollment materials), The Valley School shall establish a waiting list of students who shall be offered the opportunity to enroll at The Valley School if additional space later becomes available. The waiting list shall carry over to subsequent years.
- (vi) The Valley School shall not permit concurrent enrollment of any student at both The Valley School and another public or non-public school.
- (vii) The minimum enrollment for each school year shall be 25 full-time students. The District shall have the right to terminate this contract at a semester break if student enrollment in The Valley School falls and remains under 25 students for twenty (20) or more days during any school year, as provided in ORS Chapter 338. For purposes of this contract, "full-time student" means a student who is receiving more than one-half of his/her instructional program at The Valley School.

H. Notices for Enrollment and Withdrawal of Non-Resident Students

- (i) The Valley School shall provide the District with written notice of the enrollment of any student who does not reside within the District. Such notice shall be provided within ten (10) days of the enrollment. Within ten (10) days after receiving such notice, the District shall provide to the student's parent, legal guardian or person in parental relationship written information about:
 - a. The District's responsibility to identify, locate and evaluate students enrolled in The Valley School to determine which students may be in need of special education and related services as provided by ORS 338.165; and
 - b. The methods by which the District may be contacted to answer questions or provide information related to special education and related services.

- (ii) The Valley School shall ²⁰⁸provide the District with written notice of the

withdrawal from The Valley School of any student who does not reside within the District. Such notice shall be provided within five (5) business days of the withdrawal. Within five (5) business days after receiving such notice, the District shall:

- a. Provide to the school district in which the student resides written notice that the student has withdrawn.
- b. Provide to the student's parent, legal guardian or person in parental relationship written information about:
 1. The responsibility of the school district in which the student resides to identify, locate and evaluate students who reside in the school district to determine which students may be in need of special education and related services as provided by ORS 338.165; and
 2. The methods by which the school district in which the student resides may be contacted to answer questions or provide information related to special education and related services.

I. Student Attendance, Conduct and Discipline

- (i) The Valley School shall implement a system of uniform student discipline consistent with Oregon law. ~~A current copy of the adopted discipline policy shall be provided to the District prior to July 1, 2021 and~~ Revised copies will be provided to the District each time any changes are made to the policy.
- (ii) The Valley School shall notify its students and parents of the student rights and responsibilities at the beginning of each school year, or as the student meets the admission requirements as stated in this contract. Student rights and responsibilities will also be published in the parent handbook.
- (iii) The Valley School shall maintain up-to-date enrollment information using District student information system. Enrollment information shall be entered no later than the close of the day the student starts in classes, and attendance information shall be entered on a daily basis.

- (iv) The Valley School shall notify the district in which the student resides immediately upon the expulsion of a student from The Valley School and provide a copy of the written expulsion notice. All suspension and expulsion records shall be entered in the District student information system and a detailed written notice of student expulsions provided to the District within 3 business days of the event.
- (v) The Valley School and the District shall extend full faith and credit to the suspension and expulsion of a student of the other, unless both parties agree in writing to a variance from this requirement.
- (vi) Truancy - Student attendance at The Valley School will be in compliance with Oregon compulsory attendance laws. Per state law, The Valley School shall drop any student who is unaccounted for after 10 consecutive school days. Staff will make every available attempt to locate a student's whereabouts prior to dropping the student. The administrator of The Valley School shall take any necessary steps, allowed by law, to address the student's truancy.

J. Education of Special Populations

(i) Education of Talented and Gifted Students

The Valley School shall comply with ORS 343.391 - 343.413 and administrative rules adopted by the State Board of Education for implementing these statutes. The Valley School will provide identified TAG students with instruction commensurate with their rate and level of learning.

(ii) Education of English Language Learners

The Valley School shall identify ELL students and provide them with language acquisition by a qualified instructor. The Valley School may contract with the District for these services and thus the District would retain the additional ADM for that service.

(iii) Education of Students with Disabilities

a. Special Education

1. The Valley School will include the following notification in the parent/student handbook, website, and other parent materials.

The Medford School District has the responsibility to identify, locate, and evaluate to determine a student's needs for special education and related services and to provide those special education services at the charter school. The Medford School District holds this responsibility for all students enrolled in a district-sponsored charter school, regardless of where the student resides.

If you have questions about special education

evaluations and services, please contact the Medford School District's Special Education and Student Services Office at 541.842.3628.

2. Upon ~~application and completion of registration packet by~~ enrollment of a student with a disability at The Valley School, it will notify the resident district of student enrollment by requesting records, including special education records, from the previous school. The District, as the sponsoring district, will convene an Individualized Education Program (IEP) meeting with individuals knowledgeable about the student to evaluate the student's individual needs and to determine an appropriate placement for the student. The parent, school, and District staff will be included in this meeting.
3. Students with disabilities admitted to The Valley School shall be afforded the same opportunities to be appropriately placed as if the student was admitted to a traditional public school in the District.
4. If the IEP team determines the student's educational needs cannot be met at The Valley School, an alternate placement will be recommended ~~in a traditional public school~~ with the resident district.
5. Students with disabilities who are enrolled in The Valley School shall be provided with programs implemented in accordance with federal and state laws and local policies and procedures, specifically the Individuals with Disabilities Education Improvement Act (IDEIA), Section 504 of the Rehabilitation Act of 1973, Oregon Administrative Rules (OARs), and the District's School Board Policies and procedures related to special education. Copies of the District's policies and procedures will be provided to The Valley School.
6. The District Board Policies related to students with disabilities that will be adhered to by The Valley School include, but are not limited to
 1. GBAE/ I.GBAE-AR—Special Education: Participation in Regular Education Program
 2. JGDA/ JGDA-AR—Discipline of Students With Disabilities
7. The District Special Education Procedures related to students with disabilities that will be adhered to by The Valley School in collaboration with the District include, but are not limited to:

1. Child Find,
 2. Pre-Referral Process,
 3. Screenings for Students Not Eligible for Special Education,
 4. Request for Special Education Evaluation,
 5. Individualized Education Program, and
 6. Student Behavior and Discipline
8. The District, as the sponsoring district, is the responsible party to provide a Free Appropriate Public Education (FAPE) to each eligible student with a disability enrolled in The Valley School. ~~All special education and related services will be provided on site at The Valley School, unless the District, The Valley School, and parents agree to other arrangements.~~ The Valley School shall be responsible to implement the accommodations and modifications as outlined in the student's IEP.
 9. Transportation for special education students will only be provided to a student attending The Valley School if it is ~~based on student need and is documented~~ **included** as a related service on the student's IEP.

(iv) Section 504

The Valley School will provide reasonable accommodations to students with a physical or mental impairment that substantially limits a major life activity if and to the extent required to enable such students to have an opportunity to be successful in their educational program equal to that of their non-disabled peers. The Valley School shall prepare a 504 Accommodation Plan ~~for all such students who do not have an IEP~~ in accordance with Section 504 of the Rehabilitation Act and its implementing regulations.

- (v) Training Related to Special Education and Section 504. The Valley School may request training related to special education, students with disabilities, and Section 504, at no charge, from District.

K. Tuition and Fees

The Valley School shall not charge tuition to students attending The Valley School. The Valley School shall not charge tuition for programs, classes or courses of study which are part of the regular school program. The Valley School may charge reasonable deposits and fees in accordance with ORS

339.155 for optional after-school programs and student activities.

L. Student Welfare and Safety

The Valley School shall comply with all applicable state and federal laws

concerning student welfare, safety and health, including, without limitation, the mandatory reporting of child abuse, **sexual conduct**, accident prevention and disaster response, and any local, state or federal regulations governing the operation of school facilities and submit to the District a plan for training of staff in these areas as well as documentation of completion.

- (i) All employees of The Valley School are responsible for the reporting of **sexual conduct**, child abuse and neglect in accordance with state law.
- (ii) The Valley School shall immediately inform the District Liaison of any incident regarding **sexual conduct**, child abuse and/or neglect.
- (iii) The Valley School shall comply with state and federal law relating to drug administration to students.
- (iv) The Valley School shall comply with OAR 5484-020-0041, the Teacher Standards and Practices Commission requirements that the chief administrator report certain acts of gross neglect of duty by licensed staff.
- (v) The Valley School shall participate in the safe schools online trainings offered by the District including **sexual conduct and** child abuse reporting, bloodborne pathogens, etc. All staff will be trained by October 31 of each year.

M. School Year; School Day; Hours of Operation

The Valley School shall operate an instructional program in accordance with Section 4.B of this contract, unless otherwise stated in this contract. The school calendar shall be similar but may vary from the District's school calendar. The Valley School will meet or exceed all instructional hour requirements in OAR 581-022-~~462~~**230**. The Valley School will determine and publish its school calendar annually, and will provide a copy to the District and the public no later than ~~thirtyten~~**(3049)** business days after the Medford School District calendar has been approved.

N. Alternative Education Model

Subject to applicable state law, federal law, and the terms of this contract, The Valley School shall be allowed to promote and implement learning situations that are flexible with regard to environment, time, structure and pedagogy.

5. Evaluation of Student Performance and Procedures for Corrective Action

- A. The Valley School shall pursue and make reasonable progress toward achievement of the goals, objectives and student performance standards consistent with those set forth in this section, provided that such goals, objectives and student performance standards shall at all times remain in compliance with Oregon law and the provisions of this contract. The Valley School shall summarize its progress toward meeting these academic goals in the annual report to the District.
- B. The Valley School will assure the District that The Valley School will produce similar results in core subjects of students meeting ~~or exceeding~~ state and District academic performance standards for their like age group schools (ESSA requirements, Oregon State grade-level benchmark assessments, Oregon report card data,) and that all The Valley School students will participate in the standard ~~District-wide~~ assessments per Oregon assessment procedures.
- C. For purposes of Section 5, paragraph B of this contract, the following student groups shall be utilized when comparing student assessment scores:
 - (i) racial/ethnicity
 - (ii) students with disabilities
 - (iii) limited English proficient (LEP)
 - (iv) economically disadvantaged
 - (v) grade level

For purposes of this contract, student assessment scores shall be compared by student group when there are a statistically significant number of students in the group. The term "statistically significant" shall mean six (6) or more students.

- D. The Valley School will provide a School Improvement Plan (SIP) to the District at least once per school year. The SIP shall include improvement goals, metrics for evaluation, an action plan and report on the school's progress toward meeting its goals. ~~The Valley School will provide a School Improvement Plan (SIP) subject to District timelines and guidelines. The SIP shall include baseline data, improvement goals, an action plan and an evaluation of the school's progress toward meeting its goals.~~ If the percentage of The Valley School students meeting or exceeding the standards on the state assessment tests at any grade level is not at or above the percentage of the District's

students who meet or exceed the standards at that grade level for any year, The Valley School shall revise, subject to the District's approval, the SIP, describing the actions that The Valley School will undertake to improve student achievement. The SIP will be updated annually and reviewed as a part of the District's annual review of The Valley School.

- E. If, following any revisions under Section 5.D, above, The Valley School's student assessment scores by group and grade level are not at or above the District's assessment scores by subgroup and grade level for a ~~third~~ ~~second~~ consecutive year, then the District may take action to terminate this contract under Section 8, paragraph I of this contract.
- F. If The Valley School fails to follow any of the actions stated in any of the SIP as stated above the District shall issue a written notice to The Valley School that it must comply with the terms of the SIP immediately. If, after fifteen (15) business days, The Valley School is not in compliance with the SIP, the District may begin the process of terminating The Valley School's operation as a public charter school under Section 8, paragraph I of this contract.
- G. The Valley School may request the District's average score for its students that have taken the statewide assessment within ten (10) business days of the District receiving those scores.
- H. The Valley School will pursue yearly progress measures as established by the State of Oregon under ESSA, and as measured by participation rates and scores on the Oregon Statewide Assessments, attendance and any other criteria used by the state to determine student performance levels for all public schools. The Valley School will be subject to applicable federal and state sanctions for any failure to demonstrate student achievement.

6. Economic Plan, Budget and Annual Audit

A. Funding

- (i) Except as provided in Section 6.A.(ii) of this contract, the District shall provide funding to The Valley School at an amount per weighted average daily membership (ADMw) of The Valley School that is equal to 80 percent of the amount of the District's general purpose grant per ADMw as calculated under ORS 327.013 for The Valley School students in grades sixth through eighth. Funding shall be determined based on monthly ADMw reports provided to the District by The Valley School, with an annual reconciliation after the District receives the final ADMw report from the Oregon Department of Education. So long as The Valley School is not in violation of ORS Chapter 338, this funding will be made available to The Valley School, commencing on the date set forth and according to the distribution schedule set forth in Section 6, paragraph C, subparagraph (vi) below. The District will adjust the funding to reflect the actual funded pupil count as of October 1 of each year. In addition, to the extent the District experiences any reduction

or increase in its state funding, proportionate reductions or increases will be made to The Valley School by adjustment or setoff in subsequent months. This amount is calculated by the Oregon Department of Education and provided to the District on the State School Fund District Estimate that the Department of Education periodically provides to school districts.

- (ii) Pursuant to ORS 338.165, if a student is enrolled in The Valley School and is eligible for special education and related services, an additional amount shall be added to the ADM of The Valley School as described in ORS 327.013(1)(c)(A)(i). The payment per ADMw in The Valley School that is attributable to the student who is eligible for special education and related services shall equal an amount that is at least equal to 40% of the amount of the General Purpose Grant per ADMw for the District, as calculated under ORS 327.013, for students who are enrolled in sixth through eighth grade.
- (iii) The District shall provide funding to The Valley School consistent with the requirements of ORS 338.157.
- (iv) Any financial commitment on the part of the District contained in this contract is subject to appropriation by the State of Oregon and the parties agree that the District has no obligation to fund The Valley School operations except as expressly provided herein or in ORS Chapter 338.

B. Budget

- (i) On or before April 15 of each year, The Valley School shall submit to the District The Valley School's projected enrollment and proposed budget for the upcoming school year.
- (ii) On or before July 1 of each year, The Valley School shall submit to the District The Valley School adopted budget for the upcoming school year.
- (iii) The Valley School shall be responsible for all costs of subcontracting for goods and services, except as expressly provided in this contract.
- (iv) The fiscal year of The Valley School shall begin on July 1 of each year and end on June 30 of the subsequent to coincide with the District's fiscal year.

C. Financial Records, Audits and Accounting Reports

At all times, The Valley School shall maintain appropriate governance and managerial procedures and financial controls including, but without limitation, (a) accounting and financial record keeping procedures which

reflect Generally Accepted Accounting Principles (GAAP); (b) procedures for cash management, investment practices and financial reporting; (c) balance sheets reflecting assets, expenditures and liabilities; (d) segregation of duties for individuals performing cash management and investment practices; and (e) processes reflecting annual review of such systems by both The Valley School and the District. The Valley School's accounting methods shall be compatible with the budget and accounting system of the District, and shall comply in all instances with applicable governmental accounting requirements that explicitly apply to charter schools. In addition:

- (i) The Valley School agrees to establish, maintain and retain appropriate financial records in accordance with applicable state and federal laws and to make such records available to the District. Within 60 days of the end of each month The Valley School shall submit to the District monthly income and expense reports, as well as a monthly balance sheet showing liabilities and assets. Upon request The Valley School will provide an Aged Accounts Payable statement showing any accounts that are 30, 60, 90 or 90+ days past due within 10 days of the District's request to do so.
- (ii) The Valley School shall have an annual audit of its accounts in accordance with Municipal Financial Audit Law, ORS 297.405 to 297.555 and 297.990~~8~~. The Valley School shall submit this audit, along with copies of letters from The Valley School's auditor to the District by **the later of** October 15 of each year **or within ten (10) days of receipt of the audit from the auditor**. In addition, The Valley School shall provide a copy of the audit report to Oregon Department of Education and the State Board of Education.
- (iii) The Valley School shall submit its Internal Revenue Service Form 990 to the IRS by the 15th day of the 5th month following the end of its fiscal year (November 15), or within any extension approved by the IRS, and shall provide a copy to the District within 10 days of filing.
- (iv) The Valley School shall operate in accordance with generally accepted accounting procedures (GAAP) or other generally-accepted standards of fiscal management, provided that The Valley School's accounting methods shall comply in all instances with applicable governmental accounting requirements.
- (v) The Valley School shall maintain up-to-date enrollment using the District SIS.
- (vi) The District shall distribute to The Valley School funds as determined in Section 6, paragraph A of this contract, in the following amounts on or before the following dates for each school year:
 - July 25 - 16.66 percent
 - August 25 - 8.33 percent

- September 25 - 8.33 percent
- October 25 - 8.33 percent
- November 25 - 8.33 percent
- December 25 - 8.33 percent
- January 25 - 8.33 percent
- February 25 - 8.33 percent
- March 25 - 8.33 percent
- April 25 - 8.33 percent
- May 25 - balance

- (a) An annual reconciliation adjustment per ODE final ADMw calculation will occur after the District receives the report.

The parties acknowledge that the above payment schedule is intended to follow the disbursement schedule of State School Fund payments to the District under ORS 327.095. The parties further agree that should the disbursement schedule of the State School Fund be modified during the term of this contract, the disbursement schedule of payments from the District to The Valley School shall be modified to reflect such changes. The District shall still be required to transfer the payment due The Valley School under this contract within ten (10) days of the receipt of such payment from the State School Fund.

- (vii) In the event that this contract is revoked, terminated or not renewed by the District, The Valley School shall give to the State Board of Education, pursuant to ORS 338.105(6) ~~refund to the District~~ all unspent public funds that were given to The Valley School by the District other than the amount sufficient to cover all accrued, but unpaid expenses.
- (viii) The parties acknowledge that under ORS 338.155(9)(b) The Valley School is entitled to other state sources of funds, such as grants from the Oregon Department of Education that are available to school districts based solely on the weighted average daily membership (ADMw) of the school district which are not included in this contract and/or which are not part of the state school fund formula. The Valley School will only be eligible to receive grant funds from the District if The Valley School students were used in grant application calculations and The Valley School is providing the services for students qualifying for funding.
- (ix) The parties acknowledge that under ORS 338.155(9)(a) The Valley School may apply for any grant that is available to school districts or non-chartered public schools from the Oregon Department of Education.

- (x) The Valley School may accept gifts, donations or grants pursuant to ORS Chapter 338, provided that no such gifts, grants or donations may be accepted if contrary to applicable law or the terms of this contract. In the event that The Valley School solicits funding from other sources than the District, it shall comply with all applicable state and federal laws regarding reporting of such charitable solicitations. The Valley School shall annually report all gifts, donations and grants to the District by recording same in the financial records described in Section 6, paragraph C above.

D. Budget Information and District Payment

Notwithstanding Section 6, paragraph A and Section 6, paragraph C, subparagraph (vi) of this contract, if The Valley School has not submitted the proposed budget, the adopted budget, the annual audit or any other financial information the District requests by the date The Valley School is to provide the information to the District, the District ~~shall~~ may withhold any and all State School Fund payments to The Valley School until the information is received by the District.

7. Building and Facilities

- A. The Valley School will be located at a school facility within the District boundaries. Currently, The Valley School's facility is located at 857 Valley View Dr. Medford, OR. 97504. The Valley School shall take the necessary steps to obtain and maintain in full force and effect throughout the term of this contract the appropriate and necessary occupancy permits and any other health and safety permits and approvals for the operation of a charter school at the facility. Certification of such permits and approvals shall be submitted to the District any time there is a change requiring new permits and/or approvals and at such other times as the District may reasonably request.
- B. The Valley School may change its physical location or obtain additional facilities within the District boundaries provided that The Valley School fulfills the obligations and provides the information set forth in this section with respect to such new or additional facilities and provided further that The Valley School notifies the District of the proposed change in location or addition of facilities not less than thirty (30) calendar days prior to taking any final action in connection therewith.

8. Governance and Operation

The Valley School shall govern and operate the charter school as set forth in ~~this agreement~~ its application to the extent permissible under federal and state law and subject to all conditions of this contract.

A. Corporate Status

- (i) The Valley School is registered as an Oregon nonprofit corporation and shall maintain in good standing with the Oregon Corporation Division as a nonprofit corporation for the term of this contract. In addition, The Valley School is an organization exempt from taxation under Section 501(c)(3) of the Internal Revenue Code and shall maintain that status for the term of this contract. The Valley School shall not make any changes to its Articles of Incorporation or bylaws which would or could result in a fundamental change to the educational program or curriculum described in Section 4 of this contract without the prior written approval of the District. Promptly upon written request from the District ~~Within thirty(30) days after~~ making any changes to its Articles of Incorporation or bylaws, The Valley School shall ~~provide~~ notify the District ~~of~~ copies of any changes The Valley School makes to such documents. ~~A current copy of the Articles of Incorporation and Bylaws, as amended, shall be provided to the District prior to July 1,, and revised copies will be provided to the District each time any amendments are made. Upon written request from the District, The Valley School shall also provide to the District prior to July 1, a current organizational chart. and revised copies will be provided to the District each time any revisions are made.~~

B. Non-religious, Non-sectarian Status

The Valley School agrees that it shall operate in all respects as a non sectarian, non-religious public charter school. The Valley School shall not be affiliated with any non-public sectarian school or religious organization.

C. Non-discrimination

The Valley School shall comply with all federal and state laws regarding non-discrimination, including without limitation, statutory and constitutional provisions prohibiting discrimination on the basis of disability, age, race, creed, color, sex, **gender identity**, national origin, religion, ancestry, marital status, political beliefs and/or affiliations, or sexual orientation.

D. Public Meeting and Public Records

The Valley School and its Board of Directors are subject to the provisions of Oregon Public Meetings Law, ORS 192.610 to 192.705~~690~~ and Oregon Public Records Law, ORS 192.311~~410~~ to 192.478~~505~~.

The Valley School shall ~~post~~submit their School Board minutes to the **Charter's public website** ~~district~~ within two (2) weeks after each meeting.

E. Operational Powers

Subject to the conditions and provisions of this contract, The Valley School through its Board of Directors shall be fiscally responsible for its own

operations within limitations of any funding provided by the District and other revenues derived by The Valley School consistent with law.

- (i) The Valley School shall have the authority to exercise independently, also consistent with federal and state law, all powers granted to nonprofit corporations and charter schools so long as such powers are not inconsistent with the terms of this contract, including without limitation the following powers (and including such other powers as provided for elsewhere in this contract): making all personnel decisions, including hiring, firing and discipline of all teachers, supervisors, and staff; contract for goods and services necessary for the operation of The Valley School; prepare a budget; procure insurance and necessary bonds; lease facilities for school purposes; purchase, lease or rent furniture, equipment and supplies; retain fees collected from students in accordance with law; organize and carry out fund-raising efforts; and accept and expend gifts, donations or grants of any kind in accordance with such conditions prescribed by the donors as are consistent with law and not contrary to any of the terms of this contract.
- (ii) Notwithstanding the above, unless purchased through the District, contractual services and purchases of supplies, materials and equipment purchased with public funds in excess of \$1025,000.00 shall be procured through a system of competitive bidding as required by state and federal law.

F. Third Party Contracts

Except as may otherwise be prohibited by the terms of this contract or Oregon law, The Valley School may contract with third parties to provide personnel and services necessary for or incidental to the operation of The Valley School, including but not limited to the recruiting, hiring, and compensation of any such personnel, so long as:

- (i) The Valley School's governing board does not control the operations of the third party;
- (ii) The Valley School at all times maintains a right of control and final decision making authority over those decisions that involve the governmental function of providing a public education, including but not limited to the authority to develop and modify its curriculum, to ensure that instruction is consistent with the approved curriculum, to make decisions affecting its students' access to education, including but not limited to disciplinary decisions, and to make decisions regarding the hiring, firing and discipline of all teachers, supervisors and staff providing services to The Valley School;
- (iii) The Valley School at all times maintains and provides procedural safeguards to affected members of the public in relation to those

aspects of the Valley School's operations that constitute the governmental function of providing a public education, including but not limited to procedures to allow persons to seek redress from the Valley School as a result of the contractor's actions; and

- (iv) As provided in Section 10.E of this contract, The Valley School agrees to defend, indemnify and hold the District free and harmless from any and all claims and/or liability of any kind or nature arising out of any such third party contracts entered into by The Valley School.

G. Annual Report and Review

- (i) By January 15 of each year or within thirty (30) days of receipt of the annual audit, whichever is later, The Valley School shall prepare and submit to the District and the State Board of Education an annual report which will include, without limitation, the following:
 - (a) Information on the performance of the school overall, including summary enrollment levels, attendance rates, student conduct and discipline data, an analysis of the students' progress toward meeting academic goals and objectives, summary data on the accomplishment of the school's educational program and operational goals, an outline of goals for the upcoming year along with an action plan to achieve those goals and evaluation plan to measure attainment of those goals;
 - (b) The audit and financial statements required under Section 6 paragraph C of this contract, including proof of insurance;
 - (c) Policy development issues;
 - (d) Student discipline information; and
 - (e) Any other information the District reasonably deems necessary to demonstrate that The Valley School is in compliance with state and federal law and the terms of this contract.
- (ii) District board and staff members may visit the The Valley School charter site at any time during operating hours. Pursuant to state law (currently ORS 338.095), the District or its designee will, at least annually, visit the The Valley School site and review The Valley School' compliance with the terms and provisions of this charter. The District will provide not less than five working days' prior notice of the annual site review.

H. Term

- (i) Provided the conditions set forth in Section 2 have been met, The Valley School's charter and this contract shall become effective on July 1, 2026+ and will last for a period of five (5) school years until June 30,

203126, subject to the provisions of Section 8.I, below.

I. Termination

- (i) To the extent allowed by ORS Chapter 338 the District may revoke the charter and terminate this contract on any of the following grounds:
 - (a) Violation of or failure to meet and sustain any terms of this contract or ORS Chapter 338.
 - (b) Failure to meet the requirements for student performance stated in Section 5 of this contract.
 - (c) Failure to correct any violation of a federal or state law that is described in ORS 338.115.
 - (d) Failure to maintain insurance as described in Section 10 of this contract.
 - (e) Failure to maintain financial stability.
 - (f) Failure to maintain, for two or more consecutive years, a sound financial management system.
- (ii) The District shall provide sixty (60) days prior written notice of its intent to terminate the charter agreement. The Valley School may appeal the District's decision to terminate the charter agreement directly to the District's Board and request a hearing prior to the expiration of the 60-day notice period. The Valley School may respond to the allegations in the District's written notification by offering documentary evidence and oral argument. The District bears the burden of proving the allegations in the written notification by a preponderance of the evidence. The Valley School has the burden of proof for any affirmative defense to the allegations by a preponderance of the evidence. The District Board's decision may only be appealed to the State Board of Education according to ORS 338.105. Until the effective date of termination of this contract, as determined by the District, the District shall continue to make the funding payments under Section 6 of this contract to The Valley School.
- (iii) The Valley School shall only terminate this charter at the end of a semester. The Valley School shall notify the District in writing at least one hundred eighty (180) calendar days prior to the proposed effective date of termination, dissolution or closure of The Valley School.
- (iv) Notwithstanding anything to the contrary in Sections 8.I(i)-(iii), above, the District may terminate the charter immediately and close the school if The Valley School is endangering the health or safety of the students enrolled at The Valley School.
- (v) In the event of termination of The Valley School as a public charter school, all assets purchased with public funds given to The Valley School by the District in accordance with this contract shall be given to the State Board of Education in accordance with ORS 338.105(6).

Prior to July 15, 2015, The Valley School ~~shall~~ prepared and delivered to the District a list of assets that The Valley School held prior to becoming a public charter school. The Valley School is entitled to retain any asset that appears on such list that was purchased with non-public funds, or was purchased with public funds if less than \$500.00 of public funds were expended on the asset, at the time The Valley School ceases to operate as a public charter school, and to any other asset that The Valley School has acquired through the expenditure of non-public funds as described in Section 8, paragraph K of this contract.

- (vi) As provided in ORS 338.105(6), upon termination of this contract for any reason or upon the dissolution of The Valley School, all student education records of The Valley School shall be delivered to the administrative office of the District.

J. Dissolution

In the event The Valley School should cease operations as a public charter school for whatever reasons, including but not limited to, the non-renewal or revocation of its charter, or dissolution of the nonprofit corporation, it is agreed that The Valley School's legal authority to operate as a private or non chartered public school shall not be abridged. However the assets of The Valley School that were purchased with public funds given to The Valley School by the District under this contract, or by any other public entity, shall be distributed in the same manner as described in Section 8, paragraph K of this contract

K. Property Inventory Control

- (i) The Valley School shall maintain records of purchases ~~orders~~ for all assets over \$51000.00. These records shall indicate whether the assets were purchased with public funds, or non-public funds. The Valley School shall provide the District with a copy of this purchase ~~order~~ record ~~upon request no later than July 15 of each year that The Valley School operates as a public charter school in the District.~~ For purposes of this section public funds shall include any and all funds distributed to The Valley School:
 - (a) By the District, pursuant to ORS 338.155 and ORS 338.165;
 - (b) By the Oregon Department of Education, including any and all federal grants for which The Valley School may apply and;
 - (c) By any agency, division or branch of the United States Government, or any entity created by an agency, division or branch of the United States Government.
- (ii) Any asset in excess of \$500.00 which was purchased by The Valley School with public funds shall be given to the State Board of Education upon termination pursuant to ORS 338.105(6). The Valley School may retain any asset which was purchased with non-public funds upon termination. If The Valley School does not maintain

records of purchase orders for all assets, or cannot provide records showing that an asset was purchased with non-public funds, then it shall be assumed that the asset was purchased with public funds, and upon termination the asset in question shall be given to the State Board of Education pursuant to ORS 338.105(6).

- (iii) The parties acknowledge that assets costing less than \$500.00 may have little value at the time of any termination of this contract. Therefore, The Valley School will not be held responsible for identifying assets costing less than \$500.00 and purchased with public funds, but the District does not waive any rights that the State Board of Education may have to enforce ORS 338.105(6).

9. Employment Matters

The Valley School shall be the employer of all employees of The Valley School. Employees of The Valley School shall not be considered, for any purpose, to be employees of the District. Employees of The Valley School shall not be entitled to, or be covered by, any collective bargaining agreement that the District has entered into with any of its respective employees or their exclusive representative for purposes of collective bargaining.

A. Criminal Background checks, Sexual Conduct Clearance, and Pre-employment Drug Screen.

- (i) The Valley School shall comply with ORS 181A.195539, 326.603, 326.607, ~~339.370~~, and 342.2232 relating to criminal records checks. The Valley School shall not knowingly employ an individual for whom a criminal background investigation has not been initiated or who has been convicted of an offense that would preclude that individual from working in a public school in Oregon.
- (ii) The Valley School shall comply with ORS 339.374 relating to sexual conduct & child abuse clearance.
- (iii) The Valley School shall not employ an individual who has not successfully completed a pre-employment drug screen.
- (iv) No later than ~~fifteen~~ (510) business days prior to the start of each school each year, ~~and if not already input into the District's Synergy system~~, The Valley School shall provide to the District a list containing the following employee information:
 1. Employee names and job positions
 2. Proof of valid Oregon teaching license/Charter School Registry with an endorsement appropriate to their position.
 3. Date of criminal background investigation results.
 4. Date of drug screen results
 5. Date of sexual conduct and child abuse investigation results.
 6. Evidence of Highly Qualified status

B. Teacher and Administrator Licensure/Registration Requirements

- (i) Pursuant to ORS 338.135(7), at least one-half of the total full-time equivalent (FTE) teaching and administrative staff at The Valley School shall be licensed by TSPC pursuant to ORS 342.1235, ~~342.136, 342.138 or 342.140~~. Any teaching or administrative staff not licensed by the Oregon Teacher Standards and Practices Commission (TSPC) will register with TSPC in accordance with ORS 338.135(7)(a)-(c) and OAR 584-023-0005 prior to beginning work.
- (ii) ~~All individuals employed by The Valley School who are licensed or registered with TSPC shall also comply with OAR 548-100-0091 or 584-100-0096, whichever is applicable.~~
- (iii) ~~All licensed and registered elementary and secondary teachers must hold a bachelor's degree and must meet the highly qualified teacher definition. Each educator must demonstrate subject matter competency by passing the appropriate, rigorous, state test(s) or meet the HOUSSE provisions of OAR 584-100-0016 and OAR 584-100-0038.~~
- (iv) The Valley School licensed and administrative staff may not serve students until the verification of their highly qualified status has been submitted to the District and approved.

C. The Valley School Responsibilities

- (i) The Valley School shall have a full-time licensed/negotiated building level administrator or his/her designee on-site.
- (ii) The administrator for The Valley School shall not be assigned to multiple charter schools, but shall be the administrator solely for The Valley School.
- (iii) The Valley School will make final decisions regarding hiring (other than for services contracted with District for, such as ELL/SPED), compensation, evaluation, promotion, discipline, and termination of employees working at The Valley School. The Valley School will be responsible for the supervision and evaluation of the teaching staff within The Valley School. These services may be a contracted service.
- (iv) Employees shall be paid through the payroll department of The Valley School.
- (v) Employees of The Valley School will receive benefits in compliance with their respective agreements.
- (vi) The Valley School shall comply with all applicable federal and state laws concerning employee welfare, safety, and health issues.
- (vii) The Valley School shall be responsible for establishing and maintaining personnel records for employees working at The Valley School in compliance with all applicable federal and state laws

concerning the maintenance, retention and disclosure of employee records.

- (viii) The Valley School shall ensure that its own employees comply with all applicable federal and state law relating to employee conduct as stated in the staff Handbook. The Valley School board of directors reserves the right to establish additional standards for conduct as they see fit.
- (ix) Professional development will be at the discretion of The Valley School.

10. Insurance and Legal Liabilities

A. Insurance

- (i) The Valley School shall, at its own expense, secure, retain, and provide proof of insurance consistent with the amounts set forth in Medford School District policy LBE and LBE-AR as of the time this contract is executed, or as may be revised during the term of this contract: commercial and general liability insurance; errors and omissions insurance; directors' and officers' liability insurance; automobile liability insurance; workers' compensation insurance; and property insurance.
- (ii) No later than August of each year, and at any time thereafter upon request of the District, The Valley School shall provide the District with certificates of insurance or other satisfactory proof evidencing coverage in the types and amounts set forth herein. All such insurance policies shall contain a provision requiring notice to the District, at least 30 days in advance, of any material change, non-renewal or termination to the attention of the Superintendent of

the District.

B. Legal Liabilities

- (i) Pursuant to ORS 338.115, in addition to any statute or rule that is listed in this charter, the following federal and state laws apply to The Valley School and shall be observed by The Valley School where applicable:
 - (a) Federal law.
 - (b) ORS 192.~~311.410~~ to 192.~~478.505~~ (Public Records Law).
 - (c) ORS 192.610 to 192.~~705.690~~ (Public Meetings Law).
 - (d) ORS 297.405 to 297.555 and 297.990 (Municipal Financial Audit Law).
 - (e) ORS 326.56~~15~~, 326.56~~75~~, and 326.57~~580~~ (student records).
 - (f) ORS 181A.~~195.534~~, 326.603, 326.607, ~~and 342.223 and 342.232~~ (criminal records checks).
 - (g) ORS 337.150 (textbooks).
 - (h) ORS 339.141, 339.147 and 339.155 (tuition and fees)
 - (i) ORS ~~332.505(2)~~, 659.850, 659.855 and 659.860 (discrimination).
 - (j) ORS 30.260 to 30.300 (tort claims).
 - (k) Health and safety statutes and rules.
 - (l) The statewide assessment system developed by the Oregon Department of Education under ORS 329.485 ~~(2)~~.
 - (m) ORS 329.045 (academic content areas).
 - (n) Any statute or rule that establishes requirements for instructional time provided by a school each day or during a year.
 - (o) ORS 339.250 (~~942~~) (prohibition on infliction of corporal punishment).
 - (p) ORS 339.326 (notice concerning students subject to juvenile court petitions).
 - (q) ORS 339.119 (consideration for educational services).

- (r) ORS Chapter 338.
 - (s) ORS Chapter 657 (Employment Department Law).
 - (t) Any administrative rule adopted by the Oregon state Board of Education or the Oregon Teacher Standards and Practices Commission (TSPC) regarding public charter schools.
 - (u) ORS 339.370 ~~to, 339.372, 339.388 and~~ 339.400 (reporting of **sexual conduct and** child abuse and training on prevention and identification of **sexual conduct and** child abuse).
 - (v) ORS ~~279,~~ 279A, 279B and 279C (public contracting).
 - (w) ORS 329.451 (high school diploma, modified diploma, extended diploma and certificate of attendance).
 - (x) ORS 329.546 (physical education).
 - (y) ORS 336.840 (use of personal electronic devices).
 - (z) ORS 342.856 (core teaching standards).
 - (aa) Statutes and rules that expressly apply to public charter schools.
 - (bb) Statutes and rules that apply to a special government body, as defined in ORS 174.117, or a public body, as defined in ORS 174.109.
- (ii) **Upon written request,** The Valley School shall furnish to the District copies of any written policies or procedures it may develop with respect to any matter relating to its operation and educational program upon adoption of such policy by The Valley School's governing board. ~~The Valley School will provide the district with the most recent policy editions by June 30, of each year.~~
- ~~(iii)~~ **Waiver**

The Valley School may apply to the State Board of Education for a waiver consistent with ORS 338.025. The Valley School shall notify the District in writing at least thirty (30) days prior to requesting a waiver and invite district comment on the waiver request. The written notification shall state the waiver being sought, the reasons for the waiver and how the waiver will enhance the educational program at The Valley School.

C. Full Faith and Credit

The Valley School agrees that ~~it~~ shall not extend the full faith and credit of the District to any third person or entity. The Valley School acknowledges

and agrees that it has no authority to enter into a contract that would bind the District. The Valley School's governing Board has the authority to approve contracts to which The Valley School is a party, subject to the requirements and limitations of the Oregon Constitution, state law and provisions of this contract.

D. Indemnification

- (i) To the extent not covered by insurance or otherwise barred by the Oregon Tort Claims Act in ORS Chapter 30, The Valley School agrees to defend, indemnify and hold the District, its Board, agents and employees harmless from any and all liability, claims, and demands on account of injury, loss or damage, including, without limitation, claims arising from (1) the possession, occupancy or use by The Valley School of property of The Valley School or its landlord, its faculty, employees, students, patrons, guests or agents; (2) civil rights violations, bodily injury, personal injury, sickness, disease, death, property loss or damage or any other losses of any kind whatsoever which arise out of the acts or omissions of The Valley School. This indemnification shall not apply to any liability, claims, or demands resulting solely from the wrongful act or omission of any District Board member, officer or employee. The Valley School agrees to indemnify, hold harmless and defend the District from all contract claims in which The Valley School has obligated the District without the District's prior written approval. The foregoing provision shall not be deemed a relinquishment or waiver of any kind of applicable limitations of liability provided in the Oregon Tort Claims Act.
- (ii) To the extent not covered by insurance or otherwise barred by the Oregon Tort Claims Act in ORS Chapter 30, the District agrees to defend, indemnify and hold The Valley School, its Board, agents and employees harmless from all liability, claims, or demands on account of injury, loss or damage, including, without limitation, claims arising from civil rights violations, bodily injury, personal injury, sickness, disease, death, property loss or damage or any other losses of any kind whatsoever which arise out of the administration of this contract, **including special education services provided by the District as set forth in this Agreement and applicable law**, or are in any manner connected with the District's operation. This indemnification shall not apply to any liability, claims, or demands resulting from the negligence or wrongful act or omission of any The Valley School Board member, officer or employee. This indemnification shall not apply to any liability, claims, or demands resulting from the negligence or wrongful act of any District employee working at The Valley School whose negligent or wrongful act or omission is caused in whole or in part, or directed by The Valley School. The foregoing provision shall not be deemed a relinquishment or waiver of any kind of applicable limitations of liability provided in the Oregon Tort Claims Act.
- (iii) This indemnification, defense and hold harmless obligation on behalf of The Valley School and the District shall survive the termination of

this contract. Any indemnified party shall have the right, at its own expense, to participate in the defense of any suit, without relieving the indemnifying party of any of its obligations hereunder.

E. District Disclaimer of Liability

The parties to this contract expressly acknowledge that The Valley School is not operating as an agent, or under the direction and control, of the District Board except as required by law or this contract, and that the District Board assumes no liability for any loss or injury resulting from

- (i) the acts or omissions of The Valley School, its governing Board, trustees, agents or employees;

- (ii) the use and occupancy of any building occupied by The Valley School or any matter in connection with the condition of such building; or
- (iii) any debt or contractual obligation incurred by The Valley School.

F. ADA/§504 Obligations

The Valley School acknowledges that it is legally responsible to comply with Section 504 of the Rehabilitation Act of 1973, the Americans with Disabilities Act of 1990 and ORS Chapter 659 with respect to its students, staff and patrons. The Valley School shall indemnify and hold harmless the District from all claims under these statutes.

G. Transportation

In accordance with ORS 338.145, The Valley School shall be responsible for providing transportation to students who reside within the school district and who attend The Valley School, *which may be in partnership with the District's transportation department.*

The Valley School students may obtain transportation through the student's parent/guardian, public transportation or existing public school bus lines. The District shall not be obligated to alter existing bus routes or add bus routes for purposes of providing transportation to The Valley School's students. Subject to availability of space, a District bus may stop at The Valley School's facility to drop-off and pick-up The Valley School students, if The Valley School's facility is on a designated District bus route. The District will provide transportation to The Valley School students along existing public school bus lines within the District, if space is available.

The District and The Valley School agree to meet *each year and develop a mutually agreed upon transportation plan.* ~~in August of 2021 and once a quarter in the 2021-22 school year to work on a transportation plan for Valley School. This section may or may not be modified at that time by mutual consent of the parties.~~

Renewal of Contract

As provided in ORS 338.065, any renewal of this contract shall follow the process set forth in this section.

- H. If The Valley School desires to renew its charter, it shall provide written notice to District of its request for renewal. Such notice must be provided, if at all, no earlier than ~~24~~⁷⁰ days prior to the expiration of the term of this charter, and no later than 180 days before the expiration of the term of this charter. The Valley School's written request shall indicate which terms, if any, The Valley School would propose to change from the current contract. The Valley School shall also state why it believes the current terms need to be changed in a new contract.

- I. Within fifteen (15) days of receiving the written request from The Valley School, the District shall indicate in writing what additional information, if any, it will need to make its decision to renew the contract. The District shall also indicate whether the proposed changes suggested by The Valley School are acceptable to the District.
- J. Within fifteen (15) days of receiving the District request for additional information The Valley School shall provide the requested additional information to the District.
- K. Within 45 days after receiving a written renewal request from The Valley School, the District shall hold a public hearing regarding the request for renewal.
- L. Within 10 days after the public hearing, the District shall notify The Valley School of the District's intent about the renewal of the charter.
- M. Within twenty (20) days after the public hearing, the District shall approve the renewal of the charter or state in writing the reasons for denying the renewal of the charter. The District will base the charter renewal decision on a good faith evaluation of whether The Valley School is: (a) in compliance with ORS Chapter 338 and all other applicable state and federal laws; (b) in compliance with the terms of this contract; (c) meeting or working toward meeting the student performance goals and agreements specified in Section 4 of this contract and in any of the attachments incorporated herein;

(d) fiscally stable and has used a sound financial management system, as well as an absence of audit findings of material misstatements in the audit report; and (e) otherwise in compliance with any renewal criteria set forth herein. The District shall base its renewal evaluation primarily on a review of The Valley School annual performance reports, annual audit of accounts and annual site visit and review, as well as any other information mutually agreed upon by the boards of The Valley School and the District.
- N. If the District determines that it will renew the contract, the two parties shall meet and negotiate a contract. It shall be the goal of the two parties to complete negotiation of the contract within ninety (90) days of the date the District provides notice to The Valley School that it will renew the contract. If it is not practically possible to complete the negotiation within ninety (90) days, the parties shall work in good faith, with all due diligence, to complete negotiation of the contract as quickly as possible.
- O. The District may make the renewal of this contract conditional upon the following factor(s):
 - (i) The Valley School remaining in compliance with all provisions of this contract for the remainder of the school year;

- (ii) The Valley School remaining in compliance with all federal law governing public charter schools for the remainder of the school year;
 - (i) The Valley School remaining in compliance with all state law governing public charter schools for the remainder of the school year
- P. If the District determines that it will not renew the contract, then The Valley School's board may address the reasons stated by the District and any remedial measures suggested by the District and submit a revised request for contract renewal to the District. A revised request must be submitted within fifteen (15) days of the notice of contract non-renewal. The District will then reconsider the renewal request and notify The Valley School of its decision within fifteen (15) days of receiving the revised request.
- Q. If the District determines that it will not renew the contract, then The Valley School shall cease to be a charter school sponsored by the District on June 30, 2031~~26~~; however, The Valley School shall retain its right to challenge and appeal the District's nonrenewal in accordance with ORS 338.065(6).
- R. Pursuant to ORS 338.065(5)(h), upon mutual consent at any time during the renewal process, the District and The Valley School may agree to a renewal process timeline other than that outlined in this Section 11.

11. Miscellaneous Provisions

A. Entire Agreement

This contract, including the application for a charter school submitted by The Valley School and incorporated by reference herein, contains all terms, conditions and provisions hereof and the entire understanding and all representations of understandings and discussions of the parties relating thereto, and all prior representations, understandings and discussions are merged herein and superseded and canceled by this contract.

B. Governing Law

This contract shall be governed by, subject to, and construed under the laws of the State of Oregon without regard to its conflict of law provisions. The parties intend that where this contract references federal or state law, if the law changes or new laws, rules, regulations or statutes are enacted that may affect any of the terms of this contract, the parties shall review the affected terms of this contract and conform it accordingly.

C. Assignment

The Valley School shall not, under any circumstances, assign, delegate, or contract with any entity to provide the educational program described in this contract. It is expressly understood that the charter granted by this contract

to operate the educational program runs solely and exclusively to The Valley School.

D. Terms and Conditions of Application

The parties to this contract agree that the application for a charter submitted by The Valley School, the terms of which are incorporated by reference except as amended by any specific terms of this contract, sets forth the overall goals, standards and general operational policies of The Valley School but that the application is not a complete statement of every detail of The Valley School's operation. To the extent that The Valley School desires to implement specific policies, procedures or other specific terms of operation that supplement or otherwise depart from those in the application, The Valley School shall be permitted to do so provided that any such policies, procedures and terms of operation are consistent with the goals, standards and general operational policies set forth in this contract and in ORS Chapter 338.

E. Conflict between Application and Contract

The parties agree and acknowledge that should there be a conflict between any provision of this contract and the application submitted to the District by The Valley School, the contract provision(s) shall supersede any provision contained in the application.

F. District Liaison

The District shall designate, for purposes of this contract, the District Superintendent, or his/her designee, as the official District liaison between the District and The Valley School.

G. Amendment

This contract may be modified or amended only by written agreement between The Valley School and the District. The parties agree to modify or amend this contract in order to conform to any new and/or changed laws applicable to charter schools.

H. Notice

Any notice required, or permitted, under this contract, shall be in writing and shall be effective upon personal delivery (subject to verification of service or acknowledgment of receipt) or three (3) business days after mailing when sent by certified mail, postage prepaid, or email, to the party indicated in Section 12 J of this document.

I. Definition of Business Day

For purpose of this contract, "business day" means a day in which the District administrative offices are open. "Business day" does not include

Saturdays, Sundays, official state holidays listed in ORS 336.010, federal holidays, any day(s) in which the administrative office is closed due to inclement weather or any day that the District administrative office is closed due to action taken by, or ordered to be closed by, the District Board of Directors or their designee, any instrumentality of the City of Medford, any instrumentality of Jackson County, the State of Oregon or federal government.

J. Address of Parties for Purpose of Written Notice

The following addresses are the addresses to be used when sending a written notice required by law or this contract:

Medford School District:

Attn. Superintendent ~~Jeanne Grazioli~~ Bret Champion 815 S. Oakdale
Medford, Oregon 97501

The Valley School:

Attn: Chair~~man~~ of the Board PO Box 1225
Medford, Oregon 97501

Should these addresses change, the parties agree to notify the other party within ten (10) calendar days of the address changing.

K. No Waiver

The parties agree that no assent, expressed or implied, to any breach by either of them of any one or more of the covenants and agreements expressed herein shall be deemed or to be taken to constitute a waiver of any succeeding or other breach.

L. Dispute Resolution

The intent of this dispute resolution process is to (1) minimize the oversight burden on the District, (2) ensure a fair and timely resolution to disputes, and (3) frame a charter oversight and renewal process and timeline so as to avoid disputes regarding oversight and renewal matters.

The District and The Valley School agree to work together to accomplish all tasks necessary to fully implement this charter, including the submission of any necessary and duly-prepared waiver requests to the State Board of Education.

Dispute Resolution Process: The staff, the Governing Board of The Valley School, and the District School Board agree to attempt to resolve all disputes regarding this Charter or other issues which may arise regarding The Valley School pursuant to the terms of this section in a timely,

good-faith fashion. Both shall refrain from public commentary regarding any disputes until the matter has progressed through the dispute process.

In the event that The Valley School and the District have disputes regarding the terms of this charter or any other issue regarding the relationship between The Valley School and the District, both parties agree to first frame the issue in written form and provide it to the other party as indicated in 12 J of this document. The Chairman of the Governing Board of The Valley School and the Superintendent of the District agree to meet informally and attempt to resolve the dispute. If this joint meeting fails to resolve the dispute, both parties agree to jointly identify a neutral, third party mediator. The format of the mediation session shall be developed jointly by the superintendent and the chair and shall incorporate informal rules of evidence and procedure unless both parties agree otherwise. The findings or recommendations of the mediator shall be non-binding, unless the governing boards of The Valley School and the District jointly agree to bind themselves. The Valley School may appeal to the State Board of Education concerning those matters within its jurisdiction under ORS Chapter 338.

Disputes arising from within The Valley School, including all disputes among and between students, staff, parents, volunteers, advisors, partner organizations and the Governing Board of The Valley School, shall be resolved pursuant to policies and processes developed by The Valley School.

The District shall not intervene in any such internal disputes without the consent of the Board of Directors of The Valley School and shall refer any complaints or reports regarding such disputes to the The Valley School Board for resolution. The District agrees not to intervene or become involved in the dispute unless the dispute has given the District reasonable cause to believe that a violation of this charter or related laws or agreements has occurred, or unless the Governing Board of The Valley School has requested the District to intervene in the dispute.

M. Severability

If any provision of this contract is determined to be unenforceable or invalid for any reason, the remainder of this contract shall remain in effect, unless otherwise terminated by one or both of the parties in accordance with the terms of this contract.

N. Delegation

The parties agree and acknowledge that with regard to this charter agreement between the District and The Valley School, the functions and powers of the District Board may be exercised by the District Liaison, provided that any ultimate decision regarding renewal, non-renewal or revocation of this contract be made only by the District Board.

O. Prior Actions

It is expressly agreed and understood that as a condition precedent to this contract becoming effective on the effective date specified above in Section 2, The Valley School shall have taken, completed and satisfied on or before the date specified herein, any action or obligation which is required to be completed before such effective date, and failure to do so shall constitute grounds for the District to declare this contract null and void.

P. Attorney Fees

If any suit, action or arbitration is commenced or instituted to interpret or enforce the terms of this contract, to exercise any remedy on account of a default, or otherwise relating to the provisions of this contract, the prevailing party or non-defaulting party shall be entitled to recover from the losing or defaulting party its reasonable attorney fees and costs, in addition to all other sums provided by law, at trials or arbitration. Such sums shall be determined by the court or arbitrator.

Q. The Valley School Authority to Enter Into Contract

The Valley School expressly affirms that the signatories on its behalf who sign below have the authority to enter into this contract on behalf of The Valley School and that the Board of Directors of The Valley School has duly approved this contract. The Valley School Board shall provide a copy of its written resolution authorizing The Valley School to enter into this contract to the District.

IN WITNESS WHEREOF, the parties have executed this contract effective as of the date first set forth above.

MEDFORD SCHOOL DISTRICT

THE VALLEY SCHOOL

Medford School Board of Chair

The Valley School Board Chair

DATE

DATE 

~~FIRST AMENDMENT TO CHARTER AGREEMENT BETWEEN VALLEY
SCHOOL OF SOUTHERN OREGON~~

~~AND~~

~~MEDFORD SCHOOL DISTRICT 549C~~

~~¶~~

~~THIS FIRST AMENDMENT TO CHARTER AGREEMENT BETWEEN VALLEY SCHOOL
OF SOUTHERN OREGON and MEDFORD SCHOOL DISTRICT 549C ("this First~~

~~Amendment"), made and entered into effective as of June 20, 2024, between Medford School District
549C, hereinafter referred to as "District", and Valley School of Southern Oregon, hereinafter referred
to as "the Valley School".~~

~~RECITALS~~

~~A. WHEREAS, District and the Valley School are parties to that certain Charter Agreement
with an effective date of July 1, 2021 and with a term expiring on June 30, 2026 ("the Charter
Agreement"); and~~

~~B. WHEREAS, the Valley School has requested District's approval to amend the terms of the
Charter Agreement to permit the Valley School to increase its maximum student enrollment by a
cumulative total of up to eight (8) students; and~~

~~C. WHEREAS, at a public meeting of District's Board of Directors held on June 20, 2024, the
Board approved a motion to permit the Valley School to increase its student enrollment on the terms and
conditions set forth in this First Amendment.~~

~~NOW THEREFORE, in consideration of the mutual promises contained herein, District and the
Valley School hereby agree to modify the student enrollment caps contained in the Charter Agreement
as follows:~~

~~AGREEMENT~~

~~1. Incorporation of Recitals. The Recitals set forth above are hereby incorporated by
reference as if fully set forth in this Amendment.~~

~~2. Modification of Section 4.A(i) of the Charter Agreement. Effective as of July 1, 2024,
Section 4.A(i) of the Charter Agreement is hereby revoked in its entirety and replaced with the
following:~~

~~"A. Age and Grade Range~~

~~During the term of this Agreement, the Valley School shall provide instruction to
students in grades 6-8, with a maximum enrollment of 120 students;
provided, however, that for the 2024-2025 and 2025- 2026 school years
the maximum enrollment may be increased to a total of not more than
128 students."~~

~~"~~

3. Modification of Section 4.G.iv of the Charter Agreement. Effective as of July 1, 2024, Section 4.G.iv of the Charter Agreement is hereby revoked in its entirety and replaced with the following:¶¶

"G.iv Maximum school enrollment shall be 120 students; provided, however, that for the 2024-2025 and 2025-2026 school years the maximum enrollment may be increased to a total of not more than 128 students."¶¶

4. No Further Changes. Except as expressly set forth above, the terms and provisions of the Charter Agreement are unchanged and remain in full force and effect.¶¶

IN WITNESS WHEREOF, the parties hereto have caused this First Amendment to be executed, effective as of the date first set forth above.¶¶

¶¶

Medford School District 549C — Valley School of Southern Oregon

Charter Contract Between
Valley School of Southern Oregon &
Medford School District 549C
July 1, 2026 - June 31, 2031

CHARTER SCHOOL CONTRACT	3
RECITALS	3
CONTRACT	4
1. Grant of Renewed Charter	4
2. Conditions Precedent to Grant of Renewal Charter	4
3. Effective Date	4
4. Educational Program	4
A. Age and Grade Range	4
B. Curriculum	4
C. Student Assessment/Graduation Requirements	5
D. Access to District Programs/Extracurricular Activities	6
E. Records	7
F. Non-religious and Non-discrimination	7
G. Open Enrollment	7
H. Notices for Enrollment and Withdrawal of Non-Resident Students	8
I. Student Attendance, Conduct and Discipline	9
J. Education of Special Populations	10
K. Tuition and Fees	12
L. Student Welfare and Safety	12
M. School Year; School Day; Hours of Operation	13
N. Alternative Education Model	13
5. Evaluation of Student Performance and Procedures for Corrective Action	13
6. Economic Plan, Budget and Annual Audit	15
A. Funding	15
B. Budget	15
C. Financial Records, Audits and Accounting Reports	16
D. Budget Information and District Payment	18
7. Building and Facilities	18
8. Governance and Operation	19
A. Corporate Status	19
B. Non-religious, Non-sectarian Status	19
C. Non-discrimination	19
D. Public Meeting and Public Records	19
E. Operational Powers	19
F. Third Party Contracts	20
G. Annual Report and Review	21
H. Term	22
I. Termination	22

J. Dissolution	23
K. Property Inventory Control	23
9. Employment Matters	24
B. Teacher and Administrator Licensure/Registration Requirements	25
C. The Valley School Responsibilities	25
10. Insurance and Legal Liabilities	26
A. Insurance	26
B. Legal Liabilities	26
C. Waiver	28
D. Full Faith and Credit	28
E. Indemnification	29
F. District Disclaimer of Liability	30
G. ADA/§504 Obligations	30
H. Transportation	30
11. Renewal of Contract	31
12. Miscellaneous Provisions	32
A. Entire Agreement	32
B. Governing Law	33
C. Assignment	33
D. Terms and Conditions of Application	33
E. Conflict between Application and Contract	33
F. District Liaison	33
G. Amendment	34
H. Notice	34
I. Definition of Business Day	34
J. Address of Parties for Purpose of Written Notice	34
K. No Waiver	34
L. Dispute Resolution	35
M. Severability	36
N. Delegation	36
O. Prior Actions	36
P. Attorney Fees	36
Q. The Valley School Authority to Enter Into Contract	37

CHARTER SCHOOL CONTRACT

THIS CONTRACT dated effective as of July 1, 2026 is made and entered into by and between the Medford School District 549C ("District") and The Valley School of Southern Oregon, an Oregon nonprofit corporation ("The Valley School").

RECITALS

WHEREAS, the Oregon Legislature has enacted ORS Chapter 338 for certain purposes enumerated in that chapter; and

WHEREAS, the District and Valley School are currently parties to a charter school contract, and

WHEREAS, in December 2025, a renewal request was submitted by Valley School to the District for continuation of The Valley School as a charter school to operate within District; and

WHEREAS, the District School Board held a public hearing on February 19, 2026 on the provisions of the proposal in accordance with the ORS Chapter 338 and evaluated the criteria set forth in ORS Chapter 338; and

WHEREAS, THE RESOLUTION ADOPTED by the District Board on February 19, 2026 approved the renewal of the charter contingent upon the negotiation and execution of a contract acceptable to The Valley School and District; and

WHEREAS, this contract between The Valley School and the District will constitute the full and complete agreement between the parties regarding the governance and operation of The Valley School; and

WHEREAS, the parties desire that The Valley School be authorized to operate and conduct its affairs in accordance with the terms of this agreement and ORS Chapter 338; and

WHEREAS, The Valley School continues to be an established non-profit organization under the laws of the State of Oregon, exempt under 501(c)(3) of the Internal Revenue Code, and is not associated with a nonpublic sectarian school or a religious institution, or otherwise religious based;

NOW, THEREFORE, in consideration of the foregoing recitals and the mutual understandings, releases, covenants and payments herein described, the parties agree as follows:

CONTRACT

1. Grant of Renewed Charter

The Valley School is granted, in accordance with ORS Chapter 338 and the terms and conditions of this contract, a renewed charter to operate a single public charter school located within the boundaries of the District as described herein.

2. Conditions Precedent to Grant of Renewal Charter

In order for The Valley School to continue to operate as a public charter school sponsored by the District under this charter contract, The Valley School shall remain in compliance with all provisions of the existing charter contract and with all state and federal laws governing public charter schools for the remainder of the 2025-2026 school year.

3. Effective Date

Provided that the conditions set forth in Section 2, above, are met, this contract shall commence on July 1, 2026 and shall expire on June 30, 2031, unless sooner terminated pursuant to the provisions herein.

4. Educational Program

A. Age and Grade Range

- (i) The Valley School shall provide instruction to students in grades 6-8. The maximum enrollment shall be an annual average of 128 students.
- (ii) During the term of this charter contract TVS will have the option, upon 180 days notice to the District, to request a change to the age range configuration to include either grade 5 or grade 9 commencing in the next subsequent school year.

B. Curriculum

- (i) District agrees to waive its curricular requirements, to the extent permitted by Oregon law, but subject to the provisions of this Section 4.B. (i) The Valley School shall have the authority and responsibility of designing and implementing its educational program, subject to the conditions of this contract, in a manner which is consistent with state law.
- (ii) The educational program, pupil performance standards and curriculum designed and implemented by The Valley School shall be aligned to and meet or exceed any content standards adopted by the State of Oregon and shall be designed to enable each pupil to achieve such standards.
- (iii) The Valley School agrees to comply with all state requirements concerning academic content areas as defined in ORS 329.045.

- (iv) The Valley School core curriculum materials offered to students/families will meet Oregon State Standards. The Valley School has provided to the District an outline of its core curriculum and educational program will provide similar outlines on an annual basis, by no later than October 31st of each successive school year.
- (v) The Valley School shall adhere to the philosophy and mission, instructional program, goals and objectives, and curriculum as set forth in this contract, and any fundamental changes thereto shall require the prior written consent and approval of the District. A “fundamental change” is defined as changing the academic focus of The Valley School, its philosophy or mission, or adopting a curriculum that does not meet District or state standards. The District, in its sole discretion, may identify and/or approve or disapprove of any such fundamental change.
- (vi) The Valley School shall maintain and publish to their website and prominently display at the school a written policy for resolving complaints against The Valley School, including complaints regarding curriculum. A current copy of the policy shall be provided to the District prior to July 1, each year and revised copies will be provided to the District each time any changes are made to the policy.

C. Student Assessment/Graduation Requirements

- (i) All students enrolled and attending The Valley School shall participate and take part in all mandatory statewide assessments developed by the Oregon Department of Education under ORS 329.485, as well as any assessment developed by the Oregon Department of Education, the United States Department of Education or the Oregon Legislature and required of public schools to implement the Every Student Succeeds Act(ESSA) assessment requirements. All costs associated with administering and scoring the required assessments, as well as training, shall be paid for by The Valley School. If any of the assessments described herein are discontinued, the parties shall mutually agree on the assessment tool to be utilized by The Valley School to determine the student performance standards for The Valley School’s students.
- (ii) The Valley School will conduct interim assessments in reading and math for all 6-8th graders according to the MSD assessment calendar.
- (iii) The Valley School may utilize additional normed measures to gain periodic information on student academic program and provide those reports to the District upon request.

D. Access to District Programs/Extracurricular Activities

- (i) The Valley School students are allowed to participate, in compliance with state law, in interscholastic activities that are (a) offered by District, (b) not part of The Valley School's comprehensive instructional program, and (c) for which District participates in and is sanctioned by the Oregon School Activities Association ("OSAA"). The Valley School shall pay District a fee equal to five percent (5%) of the District's General Purpose Grant per ADMw, as calculated under ORS 327.013, for each student that participates in a District interscholastic activity during any given school year. An additional 5% of the ADMw will be charged to attend a class required for participation in athletics or activities. The fee is per student, per year, regardless of the number of interscholastic activities the student may participate in during the year and is payable within sixty (60) days of when the student is added to the roster of an interscholastic activity. In order to be eligible to participate, or continue to participate, in such interscholastic activities, students must adhere to state laws, District Board policies, and all other regulations and rules concerning conduct and discipline, including but not limited to OSAA rules and regulations, District eligibility requirements (such as minimum grade point average, attendance and code of conduct), and must demonstrate the requisite level of skill, as determined by the head coach, to make the team.
- (ii) The Valley School will provide information regarding student performance and conduct to District in a timely manner and on a recurring basis to confirm continuing student eligibility. In addition to the fee to be paid by The Valley School for its students participating in interscholastic activities under this paragraph, students are also subject to any "pay to play" participation fees charged by District.
- (iii) Upon approval of the District, and provided that space and materials are available, The Valley School students will be allowed to participate in District programs within their resident attendance area school, such as physical education, instrumental and vocal music offerings or other selected options. Students must adhere to state laws, Board policies, regulations and rules concerning conduct and discipline and are subject to any fees. District will retain the ADMw for any classroom services described in this paragraph, as allowed by law.
- (iv) District is not responsible for providing any transportation to or from The Valley School for students that may be participating in interscholastic or District programs as provided in this Section 4.D.
- (v) The District will accommodate enrollment requests for specific courses not available at Valley such as advanced math, as space and resources allow. District will retain the ADMw for any classroom services described in this paragraph, as allowed by law.

E. Records

- (i) The Valley School shall comply with all record keeping requirements of state and federal law pertaining to student records and shall cooperate with the District by providing any reports or records to the District, as necessary, to meet the District's reporting obligations to the Oregon Department of Education or the U.S. Department of Education. Student records include, without limitation, immunization records, class schedules, records of academic performance, disciplinary actions, attendance, documents required pursuant to the statewide assessment system under ORS 329.485, and any documents required under federal and state laws regarding the education of students with disabilities.
- (ii) The Valley School shall comply with all applicable federal and state laws concerning the maintenance, retention and disclosure of student records, including, without limitation, the Oregon Public Records Law.
- (iii) The Valley School shall maintain up-to-date student records including enrollment, attendance and behavior in the District 549C Student Information System (SIS). The Valley School will be included in the District's membership of SIS program and therefore will not be financially responsible for the cost. District will provide training to The Valley School for SIS, but shall not be responsible for obtaining or upgrading any computers or other hardware to enable The Valley School to access or use SIS.

F. Non-religious and Non-discrimination

- (i) The educational program of The Valley School shall be non-religious and non-sectarian. The Valley School shall conform to all state and federal statutory and constitutional provisions prohibiting discrimination and shall not discriminate against any student or staff member on the basis of race, creed, color, sex, national origin, religion, ancestry, disability, marital status, sexual orientation, gender identity, political beliefs and/or affiliations.
- (ii) The Valley School will take affirmative action to recruit a diverse student body. By January 31 of each school year, The Valley School will submit to the District a plan for school promotion and recruiting. This plan will identify planned promotion and/or recruiting activities and will include content that will be included in printed materials. In addition, by May 1 of each school year The Valley School will submit to the District a demographic report of the currently enrolled students. Demographic information should be included in the report in the areas of race/ethnicity, students with disabilities, economically disadvantaged, TAG, ELL, etc.

G. Open Enrollment

- (i) Student enrollment in The Valley School shall be voluntary. All students, including students with disabilities, who reside in the District and meet legal age requirements applicable to a grade level will be

eligible for enrollment if space is available.

- (ii) As provided in ORS 338.125(2), if space is available, The Valley School may admit students who do not reside in the District. Within each phase of the enrollment process, preference will be given to residents of the District.
- (iii) As provided in ORS 338.125(3)(b), The Valley School may give admissions preference to 1) students who were enrolled in the prior year, unless expelled and 2) applicants who have siblings who are presently enrolled and who were enrolled in the prior year. Any additional preferences not specifically outlined in laws governing charter school operation in the State of Oregon will require the submission of a waiver approved by the Oregon State Board of Education prior to implementation of said preference for admission status.
- (iv) Maximum school enrollment shall be an annual average of 128 students.
- (v) If the maximum enrollment set forth in Section 4.G.iv is met, a lottery process will be implemented conforming to ORS Chapter 338. Using the lottery process at the end of each enrollment period (as defined in the enrollment materials), The Valley School shall establish a waiting list of students who shall be offered the opportunity to enroll at The Valley School if additional space later becomes available. The waiting list shall carry over to subsequent years.
- (vi) The Valley School shall not permit concurrent enrollment of any student at both The Valley School and another public or non-public school.
- (vii) The minimum enrollment for each school year shall be 25 full-time students. The District shall have the right to terminate this contract at a semester break if student enrollment in The Valley School falls and remains under 25 students for twenty (20) or more days during any school year, as provided in ORS Chapter 338. For purposes of this contract, "full-time student" means a student who is receiving more than one-half of his/her instructional program at The Valley School.

H. Notices for Enrollment and Withdrawal of Non-Resident Students

- (i) The Valley School shall provide the District with written notice of the enrollment of any student who does not reside within the District. Such notice shall be provided within ten (10) days of the enrollment. Within ten (10) days after receiving such notice, the District shall provide to the student's parent, legal guardian or person in parental relationship written information about:
 - a. The District's responsibility to identify, locate and evaluate students enrolled in The Valley School to determine which students may be in need of special education and related services as provided by ORS 338.165; and

- b. The methods by which the District may be contacted to answer questions or provide information related to special education and related services.
- (ii) The Valley School shall provide the District with written notice of the withdrawal from The Valley School of any student who does not reside within the District. Such notice shall be provided within five (5) business days of the withdrawal. Within five (5) business days after receiving such notice, the District shall:
 - a. Provide to the school district in which the student resides written notice that the student has withdrawn.
 - b. Provide to the student's parent, legal guardian or person in parental relationship written information about:
 - 1. The responsibility of the school district in which the student resides to identify, locate and evaluate students who reside in the school district to determine which students may be in need of special education and related services as provided by ORS 338.165; and
 - 2. The methods by which the school district in which the student resides may be contacted to answer questions or provide information related to special education and related services.

I. Student Attendance, Conduct and Discipline

- (i) The Valley School shall implement a system of uniform student discipline consistent with Oregon law. Revised copies will be provided to the District each time any changes are made to the policy.
- (ii) The Valley School shall notify its students and parents of the student rights and responsibilities at the beginning of each school year, or as the student meets the admission requirements as stated in this contract. Student rights and responsibilities will also be published in the parent handbook.
- (iii) The Valley School shall maintain up-to-date enrollment information using District student information system. Enrollment information shall be entered no later than the close of the day the student starts in classes, and attendance information shall be entered on a daily basis.

- (iv) The Valley School shall notify the district in which the student resides immediately upon the expulsion of a student from The Valley School and provide a copy of the written expulsion notice. All suspension and expulsion records shall be entered in the District student information system and a detailed written notice of student expulsions provided to the District within 3 business days of the event.
- (v) The Valley School and the District shall extend full faith and credit to the suspension and expulsion of a student of the other, unless both parties agree in writing to a variance from this requirement.
- (vi) Truancy - Student attendance at The Valley School will be in compliance with Oregon compulsory attendance laws. Per state law, The Valley School shall drop any student who is unaccounted for after 10 consecutive school days. Staff will make every available attempt to locate a student's whereabouts prior to dropping the student. The administrator of The Valley School shall take any necessary steps, allowed by law, to address the student's truancy.

J. Education of Special Populations

(i) Education of Talented and Gifted Students

The Valley School shall comply with ORS 343.391 - 343.413 and administrative rules adopted by the State Board of Education for implementing these statutes. The Valley School will provide identified TAG students with instruction commensurate with their rate and level of learning.

(ii) Education of English Language Learners

The Valley School shall identify ELL students and provide them with language acquisition by a qualified instructor. The Valley School may contract with the District for these services and thus the District would retain the additional ADM for that service.

(iii) Education of Students with Disabilities

a. Special Education

1. The Valley School will include the following notification in the parent/student handbook, website, and other parent materials.

The Medford School District has the responsibility to identify, locate, and evaluate to determine a student's needs for special education and related services and to provide those special education services at the charter school. The Medford School District holds this responsibility for all students enrolled in a district-sponsored charter school, regardless of where the student resides.

evaluations and services, please contact the Medford School District's Special Education and Student Services Office at 541.842.3628.

2. Upon enrollment of a student with a disability at The Valley School, it will notify the resident district of student enrollment by requesting records, including special education records, from the previous school. The District, as the sponsoring district, will convene an Individualized Education Program (IEP) meeting with individuals knowledgeable about the student to evaluate the student's individual needs and to determine an appropriate placement for the student. The parent, school, and District staff will be included in this meeting.
3. Students with disabilities admitted to The Valley School shall be afforded the same opportunities to be appropriately placed as if the student was admitted to a traditional public school in the District.
4. If the IEP team determines the student's educational needs cannot be met at The Valley School, an alternate placement will be recommended with the resident district.
5. Students with disabilities who are enrolled in The Valley School shall be provided with programs implemented in accordance with federal and state laws and local policies and procedures, specifically the Individuals with Disabilities Education Improvement Act (IDEIA), Section 504 of the Rehabilitation Act of 1973, Oregon Administrative Rules (OARs), and the District's School Board Policies and procedures related to special education. Copies of the District's policies and procedures will be provided to The Valley School.
6. The District Board Policies related to students with disabilities that will be adhered to by The Valley School include, but are not limited to
 1. GBAE/ I.GBAE-AR—Special Education: Participation in Regular Education Program
 2. JGDA/ JGDA-AR—Discipline of Students With Disabilities
7. The District Special Education Procedures related to students with disabilities that will be adhered to by The Valley School in collaboration with the District include, but are not limited to:
 1. Child Find,
 2. Pre-Referral Process,

3. Screenings for Students Not Eligible for Special Education,
 4. Request for Special Education Evaluation,
 5. Individualized Education Program, and
 6. Student Behavior and Discipline
8. The District, as the sponsoring district, is the responsible party to provide a Free Appropriate Public Education (FAPE) to each eligible student with a disability enrolled in The Valley School. The Valley School shall be responsible to implement the accommodations and modifications as outlined in the student's IEP.
 9. Transportation for special education students will only be provided to a student attending The Valley School if it is included as a related service on the student's IEP.

(iv) Section 504

The Valley School will provide reasonable accommodations to students with a physical or mental impairment that substantially limits a major life activity if and to the extent required to enable such students to have an opportunity to be successful in their educational program equal to that of their non-disabled peers. The Valley School shall prepare a 504 Accommodation Plan in accordance with Section 504 of the Rehabilitation Act and its implementing regulations.

- (v) Training Related to Special Education and Section 504. The Valley School may request training related to special education, students with disabilities, and Section 504, at no charge, from District.

K. Tuition and Fees

The Valley School shall not charge tuition to students attending The Valley School. The Valley School shall not charge tuition for programs, classes or courses of study which are part of the regular school program. The Valley School may charge reasonable deposits and fees in accordance with ORS

339.155 for optional after-school programs and student activities.

L. Student Welfare and Safety

The Valley School shall comply with all applicable state and federal laws concerning student welfare, safety and health, including, without limitation, the mandatory reporting of child abuse, sexual conduct, accident prevention and disaster response, and any local, state or federal regulations governing the operation of school facilities and submit to the District a plan for training of staff in these areas as well as documentation of completion.

- (i) All employees of The Valley School are responsible for the reporting of sexual conduct, child abuse²⁵³ and neglect in accordance with state law.

- (ii) The Valley School shall immediately inform the District Liaison of any incident regarding sexual conduct, child abuse and/or neglect.
- (iii) The Valley School shall comply with state and federal law relating to drug administration to students.
- (iv) The Valley School shall comply with OAR 584-020-0041, the Teacher Standards and Practices Commission requirements that the chief administrator report certain acts of gross neglect of duty by licensed staff.
- (v) The Valley School shall participate in the safe schools online trainings offered by the District including sexual conduct and child abuse reporting, bloodborne pathogens, etc. All staff will be trained by October 31 of each year.

M. School Year; School Day; Hours of Operation

The Valley School shall operate an instructional program in accordance with Section 4.B of this contract, unless otherwise stated in this contract. The school calendar shall be similar but may vary from the District's school calendar. The Valley School will meet or exceed all instructional hour requirements in OAR 581-022-2230. The Valley School will determine and publish its school calendar annually, and will provide a copy to the District and the public no later than thirty (30) business days after the Medford School District calendar has been approved.

N. Alternative Education Model

Subject to applicable state law, federal law, and the terms of this contract, The Valley School shall be allowed to promote and implement learning situations that are flexible with regard to environment, time, structure and pedagogy.

5. Evaluation of Student Performance and Procedures for Corrective Action

- A. The Valley School shall pursue and make reasonable progress toward achievement of the goals, objectives and student performance standards consistent with those set forth in this section, provided that such goals, objectives and student performance standards shall at all times remain in compliance with Oregon law and the provisions of this contract. The Valley School shall summarize its progress toward meeting these academic goals in the annual report to the District.
- B. The Valley School will assure the District that The Valley School will produce similar results in core subjects of students meeting state and District academic performance standards for their like age group schools (ESSA requirements, Oregon State grade-level benchmark assessments, Oregon report card data,) and that all The Valley School students will participate in the standard assessments per Oregon assessment procedures.
- C. For purposes of Section 5, paragraph B of this contract, the following student groups shall be utilized when comparing student assessment scores:

- (i) racial/ethnicity
- (ii) students with disabilities
- (iii) limited English proficient (LEP)
- (iv) economically disadvantaged
- (v) grade level

For purposes of this contract, student assessment scores shall be compared by student group when there are a statistically significant number of students in the group. The term “statistically significant” shall mean six (6) or more students.

- D. The Valley School will provide a School Improvement Plan (SIP) to the District at least once per school year. The SIP shall include improvement goals, metrics for evaluation, an action plan and report on the school’s progress toward meeting its goals. If the percentage of The Valley School students meeting or exceeding the standards on the state assessment tests at any grade level is not at or above the percentage of the District’s students who meet or exceed the standards at that grade level for any year, The Valley School shall revise, subject to the District’s approval, the SIP, describing the actions that The Valley School will undertake to improve student achievement. The SIP will be updated annually and reviewed as a part of the District’s annual review of The Valley School.
- E. If, following any revisions under Section 5.D, above, The Valley School’s student assessment scores by group and grade level are not at or above the District’s assessment scores by subgroup and grade level for a third consecutive year, then the District may take action to terminate this contract under Section 8, paragraph I of this contract.
- F. If The Valley School fails to follow any of the actions stated in any of the SIP as stated above the District shall issue a written notice to The Valley School that it must comply with the terms of the SIP immediately. If, after fifteen (15) business days, The Valley School is not in compliance with the SIP, the District may begin the process of terminating The Valley School’s operation as a public charter school under Section 8, paragraph I of this contract.
- G. The Valley School may request the District’s average score for its students that have taken the statewide assessment within ten (10) business days of the District receiving those scores.
- H. The Valley School will pursue yearly progress measures as established by the State of Oregon under ESSA, and as measured by participation rates and scores on the Oregon Statewide Assessments, attendance and any other criteria used by the state to determine student performance levels for all public schools. The Valley School will be subject to applicable federal and state sanctions for any failure to demonstrate student achievement.

6. Economic Plan, Budget and Annual Audit

A. Funding

- (i) Except as provided in Section 6.A.(ii) of this contract, the District shall provide funding to The Valley School at an amount per weighted average daily membership (ADMw) of The Valley School that is equal to 80 percent of the amount of the District's general purpose grant per ADMw as calculated under ORS 327.013 for The Valley School students in grades sixth through eighth. Funding shall be determined based on monthly ADMw reports provided to the District by The Valley School, with an annual reconciliation after the District receives the final ADMw report from the Oregon Department of Education. So long as The Valley School is not in violation of ORS Chapter 338, this funding will be made available to The Valley School, commencing on the date set forth and according to the distribution schedule set forth in Section 6, paragraph C, subparagraph (vi) below. The District will adjust the funding to reflect the actual funded pupil count as of October 1 of each year. In addition, to the extent the District experiences any reduction or increase in its state funding, proportionate reductions or increases will be made to The Valley School by adjustment or setoff in subsequent months. This amount is calculated by the Oregon Department of Education and provided to the District on the State School Fund District Estimate that the Department of Education periodically provides to school districts.
- (ii) Pursuant to ORS 338.165, if a student is enrolled in The Valley School and is eligible for special education and related services, an additional amount shall be added to the ADM of The Valley School as described in ORS 327.013(1)(c)(A)(i). The payment per ADMw in The Valley School that is attributable to the student who is eligible for special education and related services shall equal an amount that is at least equal to 40% of the amount of the General Purpose Grant per ADMw for the District, as calculated under ORS 327.013, for students who are enrolled in sixth through eighth grade.
- (iii) The District shall provide funding to The Valley School consistent with the requirements of ORS 338.157.
- (iv) Any financial commitment on the part of the District contained in this contract is subject to appropriation by the State of Oregon and the parties agree that the District has no obligation to fund The Valley School operations except as expressly provided herein or in ORS Chapter 338.

B. Budget

- (i) On or before April 15 of each year, The Valley School shall submit to the District The Valley School's projected enrollment and proposed budget for the upcoming school year.
- (ii) On or before July 1 of each year, The Valley School shall submit to the

District The Valley School adopted budget for the upcoming school year.

- (iii) The Valley School shall be responsible for all costs of subcontracting for goods and services, except as expressly provided in this contract.
- (iv) The fiscal year of The Valley School shall begin on July 1 of each year and end on June 30 of the subsequent to coincide with the District's fiscal year.

C. Financial Records, Audits and Accounting Reports

At all times, The Valley School shall maintain appropriate governance and managerial procedures and financial controls including, but without limitation, (a) accounting and financial record keeping procedures which reflect Generally Accepted Accounting Principles (GAAP); (b) procedures for cash management, investment practices and financial reporting; (c) balance sheets reflecting assets, expenditures and liabilities; (d) segregation of duties for individuals performing cash management and investment practices; and (e) processes reflecting annual review of such systems by both The Valley School and the District. The Valley School's accounting methods shall be compatible with the budget and accounting system of the District, and shall comply in all instances with applicable governmental accounting requirements that explicitly apply to charter schools. In addition:

- (i) The Valley School agrees to establish, maintain and retain appropriate financial records in accordance with applicable state and federal laws and to make such records available to the District. Within 60 days of the end of each month The Valley School shall submit to the District monthly income and expense reports, as well as a monthly balance sheet showing liabilities and assets. Upon request The Valley School will provide an Aged Accounts Payable statement showing any accounts that are 30, 60, 90 or 90+ days past due within 10 days of the District's request to do so.
- (ii) The Valley School shall have an annual audit of its accounts in accordance with Municipal Financial Audit Law, ORS 297.405 to 297.555 and 297.990. The Valley School shall submit this audit, along with copies of letters from The Valley School's auditor to the District by the later of October 15 of each year or within ten (10) days of receipt of the audit from the auditor. In addition, The Valley School shall provide a copy of the audit report to Oregon Department of Education and the State Board of Education.
- (iii) The Valley School shall submit its Internal Revenue Service Form 990 to the IRS by the 15th day of the 5th month following the end of its fiscal year (November 15), or within any extension approved by the IRS, and shall provide a copy to the District within 10 days of filing.
- (iv) The Valley School shall operate in accordance with generally accepted accounting procedures (GAAP) or other generally-accepted standards of fiscal management, provided that The Valley School's accounting

methods shall comply in all instances with applicable governmental accounting requirements.

- (v) The Valley School shall maintain up-to-date enrollment using the District SIS.
- (vi) The District shall distribute to The Valley School funds as determined in Section 6, paragraph A of this contract, in the following amounts on or before the following dates for each school year:
 - July 25 - 16.66 percent
 - August 25 - 8.33 percent
 - September 25 - 8.33 percent
 - October 25 - 8.33 percent
 - November 25 - 8.33 percent
 - December 25 - 8.33 percent
 - January 25 - 8.33 percent
 - February 25 - 8.33 percent
 - March 25 - 8.33 percent
 - April 25 - 8.33 percent
 - May 25 - balance
 - (a) An annual reconciliation adjustment per ODE final ADMw calculation will occur after the District receives the report.

The parties acknowledge that the above payment schedule is intended to follow the disbursement schedule of State School Fund payments to the District under ORS 327.095. The parties further agree that should the disbursement schedule of the State School Fund be modified during the term of this contract, the disbursement schedule of payments from the District to The Valley School shall be modified to reflect such changes. The District shall still be required to transfer the payment due The Valley School under this contract within ten (10) days of the receipt of such payment from the State School Fund.

- (vii) In the event that this contract is revoked, terminated or not renewed by the District, The Valley School shall give to the State Board of Education, pursuant to ORS 338.105(6) all unspent public funds that were given to The Valley School by the District other than the amount sufficient to cover all accrued, but unpaid expenses.
- (viii) The parties acknowledge that under ORS 338.155(9)(b) The Valley School is entitled to other state sources of funds, such as grants from the Oregon Department of Education that are available to school districts based solely on the weighted average daily membership

(ADMw) of the school district which are not included in this contract and/or which are not part of the state school fund formula. The Valley School will only be eligible to receive grant funds from the District if The Valley School students were used in grant application calculations and The Valley School is providing the services for students qualifying for funding.

- (ix) The parties acknowledge that under ORS 338.155(9)(a) The Valley School may apply for any grant that is available to school districts or non-chartered public schools from the Oregon Department of Education.
- (x) The Valley School may accept gifts, donations or grants pursuant to ORS Chapter 338, provided that no such gifts, grants or donations may be accepted if contrary to applicable law or the terms of this contract. In the event that The Valley School solicits funding from other sources than the District, it shall comply with all applicable state and federal laws regarding reporting of such charitable solicitations. The Valley School shall annually report all gifts, donations and grants to the District by recording same in the financial records described in Section 6, paragraph C above.

D. Budget Information and District Payment

Notwithstanding Section 6, paragraph A and Section 6, paragraph C, subparagraph (vi) of this contract, if The Valley School has not submitted the proposed budget, the adopted budget, the annual audit or any other financial information the District requests by the date The Valley School is to provide the information to the District, the District may withhold any and all State School Fund payments to The Valley School until the information is received by the District.

7. Building and Facilities

- A. The Valley School will be located at a school facility within the District boundaries. Currently, The Valley School's facility is located at 857 Valley View Dr. Medford, OR. 97504. The Valley School shall take the necessary steps to obtain and maintain in full force and effect throughout the term of this contract the appropriate and necessary occupancy permits and any other health and safety permits and approvals for the operation of a charter school at the facility. Certification of such permits and approvals shall be submitted to the District any time there is a change requiring new permits and/or approvals and at such other times as the District may reasonably request.
- B. The Valley School may change its physical location or obtain additional facilities within the District boundaries provided that The Valley School fulfills the obligations and provides the information set forth in this section with respect to such new or additional facilities and provided further that The Valley School notifies the District of the proposed change in location or addition of facilities not less than thirty (30) calendar days prior to taking any final action in connection therewith.

8. Governance and Operation

The Valley School shall govern and operate the charter school as set forth in this agreement to the extent permissible under federal and state law and subject to all conditions of this contract.

A. Corporate Status

- (i) The Valley School is registered as an Oregon nonprofit corporation and shall maintain in good standing with the Oregon Corporation Division as a nonprofit corporation for the term of this contract. In addition, The Valley School is an organization exempt from taxation under Section 501(c)(3) of the Internal Revenue Code and shall maintain that status for the term of this contract. The Valley School shall not make any changes to its Articles of Incorporation or bylaws which would or could result in a fundamental change to the educational program or curriculum described in Section 4 of this contract without the prior written approval of the District. Promptly upon written request from the District after making any changes to its Articles of Incorporation or bylaws, The Valley School shall provide the District copies of any changes The Valley School makes to such documents. Upon written request from the District, The Valley School shall also provide to the District a current organizational chart.

B. Non-religious, Non-sectarian Status

The Valley School agrees that it shall operate in all respects as a non sectarian, non-religious public charter school. The Valley School shall not be affiliated with any non-public sectarian school or religious organization.

C. Non-discrimination

The Valley School shall comply with all federal and state laws regarding non-discrimination, including without limitation, statutory and constitutional provisions prohibiting discrimination on the basis of disability, age, race, creed, color, sex, gender identity, national origin, religion, ancestry, marital status, political beliefs and/or affiliations, or sexual orientation.

D. Public Meeting and Public Records

The Valley School and its Board of Directors are subject to the provisions of Oregon Public Meetings Law, ORS 192.610 to 192.705 and Oregon Public Records Law, ORS 192.311 to 192.478.

The Valley School shall post their School Board minutes to the Charter's public website within two (2) weeks after each meeting.

E. Operational Powers

Subject to the conditions and provisions of this contract, The Valley School through its Board of Directors shall be fiscally responsible for its own

operations within limitations of any funding provided by the District and other revenues derived by The Valley School consistent with law.

- (i) The Valley School shall have the authority to exercise independently, also consistent with federal and state law, all powers granted to nonprofit corporations and charter schools so long as such powers are not inconsistent with the terms of this contract, including without limitation the following powers (and including such other powers as provided for elsewhere in this contract): making all personnel decisions, including hiring, firing and discipline of all teachers, supervisors, and staff; contract for goods and services necessary for the operation of The Valley School; prepare a budget; procure insurance and necessary bonds; lease facilities for school purposes; purchase, lease or rent furniture, equipment and supplies; retain fees collected from students in accordance with law; organize and carry out fund-raising efforts; and accept and expend gifts, donations or grants of any kind in accordance with such conditions prescribed by the donors as are consistent with law and not contrary to any of the terms of this contract.
- (ii) Notwithstanding the above, unless purchased through the District, contractual services and purchases of supplies, materials and equipment purchased with public funds in excess of \$25,000.00 shall be procured through a system of competitive bidding as required by state and federal law.

F. Third Party Contracts

Except as may otherwise be prohibited by the terms of this contract or Oregon law, The Valley School may contract with third parties to provide personnel and services necessary for or incidental to the operation of The Valley School, including but not limited to the recruiting, hiring, and compensation of any such personnel, so long as:

- (i) The Valley School's governing board does not control the operations of the third party;
- (ii) The Valley School at all times maintains a right of control and final decision making authority over those decisions that involve the governmental function of providing a public education, including but not limited to the authority to develop and modify its curriculum, to ensure that instruction is consistent with the approved curriculum, to make decisions affecting its students' access to education, including but not limited to disciplinary decisions, and to make decisions regarding the hiring, firing and discipline of all teachers, supervisors and staff providing services to The Valley School;

- (iii) The Valley School at all times maintains and provides procedural safeguards to affected members of the public in relation to those aspects of the Valley School's operations that constitute the governmental function of providing a public education, including but not limited to procedures to allow persons to seek redress from the Valley School as a result of the contractor's actions; and
- (iv) As provided in Section 10.E of this contract, The Valley School agrees to defend, indemnify and hold the District free and harmless from any and all claims and/or liability of any kind or nature arising out of any such third party contracts entered into by The Valley School.

G. Annual Report and Review

- (i) By January 15 of each year or within thirty (30) days of receipt of the annual audit, whichever is later, The Valley School shall prepare and submit to the District and the State Board of Education an annual report which will include, without limitation, the following:
 - (a) Information on the performance of the school overall, including summary enrollment levels, attendance rates, student conduct and discipline data, an analysis of the students' progress toward meeting academic goals and objectives, summary data on the accomplishment of the school's educational program and operational goals, an outline of goals for the upcoming year along with an action plan to achieve those goals and evaluation plan to measure attainment of those goals;
 - (b) The audit and financial statements required under Section 6 paragraph C of this contract, including proof of insurance;
 - (c) Policy development issues;
 - (d) Student discipline information; and
 - (e) Any other information the District reasonably deems necessary to demonstrate that The Valley School is in compliance with state and federal law and the terms of this contract.
- (ii) District board and staff members may visit the The Valley School charter site at any time during operating hours. Pursuant to state law (currently ORS 338.095), the District or its designee will, at least annually, visit The Valley School site and review The Valley School' compliance with the terms and provisions of this charter. The District will provide not less than five working days' prior notice of the annual site review.

H. Term

- (i) Provided the conditions set forth in Section 2 have been met, The Valley School's charter and this contract shall become effective on July 1, 2026 and will last for a period of five (5) school years until June 30, 2031, subject to the provisions of Section 8.I, below.

I. Termination

- (i) To the extent allowed by ORS Chapter 338 the District may revoke the charter and terminate this contract on any of the following grounds:
 - (a) Violation of or failure to meet and sustain any terms of this contract or ORS Chapter 338.
 - (b) Failure to meet the requirements for student performance stated in Section 5 of this contract.
 - (c) Failure to correct any violation of a federal or state law that is described in ORS 338.115.
 - (d) Failure to maintain insurance as described in Section 10 of this contract.
 - (e) Failure to maintain financial stability.
 - (f) Failure to maintain, for two or more consecutive years, a sound financial management system.
- (ii) The District shall provide sixty (60) days prior written notice of its intent to terminate the charter agreement. The Valley School may appeal the District's decision to terminate the charter agreement directly to the District's Board and request a hearing prior to the expiration of the 60-day notice period. The Valley School may respond to the allegations in the District's written notification by offering documentary evidence and oral argument. The District bears the burden of proving the allegations in the written notification by a preponderance of the evidence. The Valley School has the burden of proof for any affirmative defense to the allegations by a preponderance of the evidence. The District Board's decision may only be appealed to the State Board of Education according to ORS 338.105. Until the effective date of termination of this contract, as determined by the District, the District shall continue to make the funding payments under Section 6 of this contract to The Valley School.
- (iii) The Valley School shall only terminate this charter at the end of a semester. The Valley School shall notify the District in writing at least one hundred eighty (180) calendar days prior to the proposed effective date of termination, dissolution or closure of The Valley School.

- (iv) Notwithstanding anything to the contrary in Sections 8.I(i)-(iii), above, the District may terminate the charter immediately and close the school if The Valley School is endangering the health or safety of the students enrolled at The Valley School.
- (v) In the event of termination of The Valley School as a public charter school, all assets purchased with public funds shall be given to the State Board of Education in accordance with ORS 338.105(6). Prior to July 15, 2015, The Valley School prepared and delivered to the District a list of assets that The Valley School held prior to becoming a public charter school. The Valley School is entitled to retain any asset that appears on such list that was purchased with non-public funds, or was purchased with public funds if less than \$500.00 of public funds were expended on the asset, at the time The Valley School ceases to operate as a public charter school, and to any other asset that The Valley School has acquired through the expenditure of non-public funds as described in Section 8, paragraph K of this contract.
- (vi) As provided in ORS 338.105(6), upon termination of this contract for any reason or upon the dissolution of The Valley School, all student education records of The Valley School shall be delivered to the administrative office of the District.

J. Dissolution

In the event The Valley School should cease operations as a public charter school for whatever reasons, including but not limited to, the non-renewal or revocation of its charter, or dissolution of the nonprofit corporation, it is agreed that The Valley School's legal authority to operate as a private or non chartered public school shall not be abridged. However the assets of The Valley School that were purchased with public funds given to The Valley School by the District under this contract, or by any other public entity, shall be distributed in the same manner as described in Section 8, paragraph K of this contract

K. Property Inventory Control

- (i) The Valley School shall maintain records of purchases for all assets over \$1000.00. These records shall indicate whether the assets were purchased with public funds, or non-public funds. The Valley School shall provide the District with a copy of this purchase record upon request. For purposes of this section public funds shall include any and all funds distributed to The Valley School:
 - (a) By the District, pursuant to ORS 338.155 and ORS 338.165;
 - (b) By the Oregon Department of Education, including any and all federal grants for which The Valley School may apply and;

- (c) By any agency, division or branch of the United States Government, or any entity created by an agency, division or branch of the United States Government.
- (ii) Any asset in excess of \$500.00 which was purchased by The Valley School with public funds shall be given to the State Board of Education upon termination pursuant to ORS 338.105(6). The Valley School may retain any asset which was purchased with non-public funds upon termination. If The Valley School does not maintain records of purchase orders for all assets, or cannot provide records showing that an asset was purchased with non-public funds, then it shall be assumed that the asset was purchased with public funds, and upon termination the asset in question shall be given to the State Board of Education pursuant to ORS 338.105(6).
- (iii) The parties acknowledge that assets costing less than \$500.00 may have little value at the time of any termination of this contract. Therefore, The Valley School will not be held responsible for identifying assets costing less than \$500.00 and purchased with public funds, but the District does not waive any rights that the State Board of Education may have to enforce ORS 338.105(6).

9. Employment Matters

The Valley School shall be the employer of all employees of The Valley School. Employees of The Valley School shall not be considered, for any purpose, to be employees of the District. Employees of The Valley School shall not be entitled to, or be covered by, any collective bargaining agreement that the District has entered into with any of its respective employees or their exclusive representative for purposes of collective bargaining.

A. Criminal Background checks, Sexual Conduct Clearance, and Pre-employment Drug Screen.

- (i) The Valley School shall comply with ORS 181A.195, 326.603, 326.607, and 342.223 relating to criminal records checks. The Valley School shall not knowingly employ an individual for whom a criminal background investigation has not been initiated or who has been convicted of an offense that would preclude that individual from working in a public school in Oregon.
- (ii) The Valley School shall comply with ORS 339.374 relating to sexual conduct & child abuse clearance.
- (iii) The Valley School shall not employ an individual who has not successfully completed a pre-employment drug screen.

- (iv) No later than five (5) business days prior to the start of each school each year, and if not already input into the District's Synergy system, The Valley School shall provide to the District a list containing the following employee information:
 1. Employee names and job positions
 2. Proof of valid Oregon teaching license/Charter School Registry with an endorsement appropriate to their position.
 3. Date of criminal background investigation results.
 4. Date of drug screen results
 5. Date of sexual conduct and child abuse investigation results.
 6. Evidence of Highly Qualified status

B. Teacher and Administrator Licensure/Registration Requirements

- (i) Pursuant to ORS 338.135(7), at least one-half of the total full-time equivalent (FTE) teaching and administrative staff at The Valley School shall be licensed by TSPC pursuant to ORS 342.125. Any teaching or administrative staff not licensed by the Oregon Teacher Standards and Practices Commission (TSPC) will register with TSPC in accordance with ORS 338.135(7)(a)-(c) and OAR 584-023-0005 prior to beginning work.
- (ii) All licensed and registered elementary and secondary teachers must hold a bachelor's degree and must meet the highly qualified teacher definition. Each educator must demonstrate subject matter competency by passing the appropriate, rigorous, state test(s) or meet the HOUSSE provisions.
- (iii) The Valley School licensed and administrative staff may not serve students until the verification of their highly qualified status has been submitted to the District and approved.

C. The Valley School Responsibilities

- (i) The Valley School shall have a full-time licensed/negotiated building level administrator or his/her designee on-site.
- (ii) The administrator for The Valley School shall not be assigned to multiple charter schools, but shall be the administrator solely for The Valley School.
- (iii) The Valley School will make final decisions regarding hiring (other than for services contracted with District for, such as ELL/SPED),

compensation, evaluation, promotion, discipline, and termination of employees working at The Valley School. The Valley School will be responsible for the supervision and evaluation of the teaching staff within The Valley School. These services may be a contracted service.

- (iv) Employees shall be paid through the payroll department of The Valley School.
- (v) Employees of The Valley School will receive benefits in compliance with their respective agreements.
- (vi) The Valley School shall comply with all applicable federal and state laws concerning employee welfare, safety, and health issues.
- (vii) The Valley School shall be responsible for establishing and maintaining personnel records for employees working at The Valley School in compliance with all applicable federal and state laws concerning the maintenance, retention and disclosure of employee records.
- (viii) The Valley School shall ensure that its own employees comply with all applicable federal and state law relating to employee conduct as stated in the staff Handbook. The Valley School board of directors reserves the right to establish additional standards for conduct as they see fit.
- (ix) Professional development will be at the discretion of The Valley School.

10. Insurance and Legal Liabilities

A. Insurance

- (i) The Valley School shall, at its own expense, secure, retain, and provide proof of insurance consistent with the amounts set forth in Medford School District policy LBE and LBE-AR as of the time this contract is executed, or as may be revised during the term of this contract: commercial and general liability insurance; errors and omissions insurance; directors' and officers' liability insurance; automobile liability insurance; workers' compensation insurance; and property insurance.
- (ii) No later than August of each year, and at any time thereafter upon request of the District, The Valley School shall provide the District with certificates of insurance or other satisfactory proof evidencing coverage in the types and amounts set forth herein. All such insurance policies shall contain a provision requiring notice to the District, at least 30 days in advance, of any material change, non-renewal or termination to the attention of the Superintendent of the District.

B. Legal Liabilities

- (i) Pursuant to ORS 338.115, in addition to any statute or rule that is listed

in this charter, the following federal and state laws apply to The Valley School and shall be observed by The Valley School where applicable:

- (a) Federal law.
- (b) ORS 192.311 to 192.478 (Public Records Law).
- (c) ORS 192.610 to 192.705 (Public Meetings Law).
- (d) ORS 297.405 to 297.555 and 297.990 (Municipal Financial Audit Law).
- (e) ORS 326.561, 326.565, and 326.575 (student records).
- (f) ORS 181A.195, 326.603, 326.607, and 342.223 (criminal records checks).
- (g) ORS 337.150 (textbooks).
- (h) ORS 339.141, 339.147 and 339.155 (tuition and fees)
- (i) ORS 332.505(2), 659.850, 659.855 and 659.860 (discrimination).
- (j) ORS 30.260 to 30.300 (tort claims).
- (k) Health and safety statutes and rules.
- (l) The statewide assessment system developed by the Oregon Department of Education under ORS 329.485(2).
- (m) ORS 329.045 (academic content areas).
- (n) Any statute or rule that establishes requirements for instructional time provided by a school each day or during a year.
- (o) ORS 339.250 (9) (prohibition on infliction of corporal punishment).
- (p) ORS 339.326 (notice concerning students subject to juvenile court petitions).
- (q) ORS 339.119 (consideration for educational services).
- (r) ORS Chapter 338.
- (s) ORS Chapter 657 (Employment Department Law).

- (t) Any administrative rule adopted by the Oregon state Board of Education or the Oregon Teacher Standards and Practices Commission (TSPC) regarding public charter schools.
 - (u) ORS 339.370 to 339.400 (reporting of sexual conduct and child abuse and training on prevention and identification of sexual conduct and child abuse).
 - (v) ORS 279A, 279B and 279C (public contracting).
 - (w) ORS 329.451 (high school diploma, modified diploma, extended diploma and certificate of attendance).
 - (x) ORS 329.546 (physical education).
 - (y) ORS 336.840 (use of personal electronic devices).
 - (z) ORS 342.856 (core teaching standards).
 - (aa) Statutes and rules that expressly apply to public charter schools.
 - (bb) Statutes and rules that apply to a special government body, as defined in ORS 174.117, or a public body, as defined in ORS 174.109.
- (ii) Upon written request, The Valley School shall furnish to the District copies of any written policies or procedures it may develop with respect to any matter relating to its operation and educational program upon adoption of such policy by The Valley School's governing board.

C. Waiver

The Valley School may apply to the State Board of Education for a waiver consistent with ORS 338.025. The Valley School shall notify the District in writing at least thirty (30) days prior to requesting a waiver and invite district comment on the waiver request. The written notification shall state the waiver being sought, the reasons for the waiver and how the waiver will enhance the educational program at The Valley School.

D. Full Faith and Credit

The Valley School agrees that it shall not extend the full faith and credit of the District to any third person or entity. The Valley School acknowledges and agrees that it has no authority to enter into a contract that would bind the District. The Valley School's governing Board has the authority to approve

contracts to which The Valley School is a party, subject to the requirements and limitations of the Oregon Constitution, state law and provisions of this contract.

E. Indemnification

- (i) To the extent not covered by insurance or otherwise barred by the Oregon Tort Claims Act in ORS Chapter 30, The Valley School agrees to defend, indemnify and hold the District, its Board, agents and employees harmless from any and all liability, claims, and demands on account of injury, loss or damage, including, without limitation, claims arising from (1) the possession, occupancy or use by The Valley School of property of The Valley School or its landlord, its faculty, employees, students, patrons, guests or agents; (2) civil rights violations, bodily injury, personal injury, sickness, disease, death, property loss or damage or any other losses of any kind whatsoever which arise out of the acts or omissions of The Valley School. This indemnification shall not apply to any liability, claims, or demands resulting solely from the wrongful act or omission of any District Board member, officer or employee. The Valley School agrees to indemnify, hold harmless and defend the District from all contract claims in which The Valley School has obligated the District without the District's prior written approval. The foregoing provision shall not be deemed a relinquishment or waiver of any kind of applicable limitations of liability provided in the Oregon Tort Claims Act.
- (ii) To the extent not covered by insurance or otherwise barred by the Oregon Tort Claims Act in ORS Chapter 30, the District agrees to defend, indemnify and hold The Valley School, its Board, agents and employees harmless from all liability, claims, or demands on account of injury, loss or damage, including, without limitation, claims arising from civil rights violations, bodily injury, personal injury, sickness, disease, death, property loss or damage or any other losses of any kind whatsoever which arise out of the administration of this contract, including special education services provided by the District as set forth in this Agreement and applicable law, or are in any manner connected with the District's operation. This indemnification shall not apply to any liability, claims, or demands resulting from the negligence or wrongful act or omission of any The Valley School Board member, officer or employee. This indemnification shall not apply to any liability, claims, or demands resulting from the negligence or wrongful act of any District employee working at The Valley School whose negligent or wrongful act or omission is caused in whole or in part, or directed by The Valley School. The foregoing provision shall not be deemed a relinquishment or waiver of any kind of applicable limitations of liability provided in the Oregon Tort Claims Act.

- (iii) This indemnification, defense and hold harmless obligation on behalf of The Valley School and the District shall survive the termination of this contract. Any indemnified party shall have the right, at its own expense, to participate in the defense of any suit, without relieving the indemnifying party of any of its obligations hereunder.

F. District Disclaimer of Liability

The parties to this contract expressly acknowledge that The Valley School is not operating as an agent, or under the direction and control, of the District Board except as required by law or this contract, and that the District Board assumes no liability for any loss or injury resulting from

- (i) the acts or omissions of The Valley School, its governing Board, trustees, agents or employees;
- (ii) the use and occupancy of any building occupied by The Valley School or any matter in connection with the condition of such building; or
- (iii) any debt or contractual obligation incurred by The Valley School.

G. ADA/§504 Obligations

The Valley School acknowledges that it is legally responsible to comply with Section 504 of the Rehabilitation Act of 1973, the Americans with Disabilities Act of 1990 and ORS Chapter 659 with respect to its students, staff and patrons. The Valley School shall indemnify and hold harmless the District from all claims under these statutes.

H. Transportation

In accordance with ORS 338.145, The Valley School shall be responsible for providing transportation to students who reside within the school district and who attend The Valley School, which may be in partnership with the District's transportation department.

The Valley School students may obtain transportation through the student's parent/guardian, public transportation or existing public school bus lines. The District shall not be obligated to alter existing bus routes or add bus routes for purposes of providing transportation to The Valley School's students. Subject to availability of space, a District bus may stop at The Valley School's facility to drop-off and pick-up The Valley School students, if The Valley School's facility is on a designated District bus route. The District will provide transportation to The Valley School students along existing public school bus lines within the District, if space is available.

The District and The Valley School agree to meet each year and develop a mutually agreed upon transportation plan.

11. Renewal of Contract

As provided in ORS 338.065, any renewal of this contract shall follow the process set forth in this section.

- A. If The Valley School desires to renew its charter, it shall provide written notice to District of its request for renewal. Such notice must be provided, if at all, no earlier than 270 days prior to the expiration of the term of this charter, and no later than 180 days before the expiration of the term of this charter. The Valley School's written request shall indicate which terms, if any, The Valley School would propose to change from the current contract. The Valley School shall also state why it believes the current terms need to be changed in a new contract.
- B. Within fifteen (15) days of receiving the written request from The Valley School, the District shall indicate in writing what additional information, if any, it will need to make its decision to renew the contract. The District shall also indicate whether the proposed changes suggested by The Valley School are acceptable to the District.
- C. Within fifteen (15) days of receiving the District request for additional information The Valley School shall provide the requested additional information to the District.
- D. Within 45 days after receiving a written renewal request from The Valley School, the District shall hold a public hearing regarding the request for renewal.
- E. Within 10 days after the public hearing, the District shall notify The Valley School of the District's intent about the renewal of the charter.
- F. Within twenty (20) days after the public hearing, the District shall approve the renewal of the charter or state in writing the reasons for denying the renewal of the charter. The District will base the charter renewal decision on a good faith evaluation of whether The Valley School is: (a) in compliance with ORS Chapter 338 and all other applicable state and federal laws; (b) in compliance with the terms of this contract; (c) meeting or working toward meeting the student performance goals and agreements specified in Section 4 of this contract and in any of the attachments incorporated herein;

(d) fiscally stable and has used a sound financial management system, as well as an absence of audit findings of material misstatements in the audit report; and (e) otherwise in compliance with any renewal criteria set forth herein. The District shall base its renewal evaluation primarily on a review of The Valley School annual performance reports, annual audit of accounts and annual site visit and review, as well as any other information mutually agreed upon by the boards of The Valley School and the District.

- G. If the District determines that it will renew the contract, the two parties shall meet and negotiate a contract. It shall be the goal of the two parties to complete negotiation of the contract within ninety (90) days of the date the District provides notice to The Valley School that it will renew the contract. If it is not practically possible to complete the negotiation within ninety (90) days, the parties shall work in good faith, with all due diligence, to complete negotiation of the contract as quickly as possible.
- H. The District may make the renewal of this contract conditional upon the following factor(s):
 - (i) The Valley School remaining in compliance with all provisions of this contract for the remainder of the school year;
 - (ii) The Valley School remaining in compliance with all federal law governing public charter schools for the remainder of the school year;
 - (iii) The Valley School remaining in compliance with all state law governing public charter schools for the remainder of the school year
- I. If the District determines that it will not renew the contract, then The Valley School's board may address the reasons stated by the District and any remedial measures suggested by the District and submit a revised request for contract renewal to the District. A revised request must be submitted within fifteen (15) days of the notice of contract non-renewal. The District will then reconsider the renewal request and notify The Valley School of its decision within fifteen (15) days of receiving the revised request.
- J. If the District determines that it will not renew the contract, then The Valley School shall cease to be a charter school sponsored by the District on June 30, 2031; however, The Valley School shall retain its right to challenge and appeal the District's nonrenewal in accordance with ORS 338.065(6).
- K. Pursuant to ORS 338.065(5)(h), upon mutual consent at any time during the renewal process, the District and The Valley School may agree to a renewal process timeline other than that outlined in this Section 11.

12. Miscellaneous Provisions

A. Entire Agreement

This contract, including the application for a charter school submitted by The Valley School and incorporated by reference herein, contains all terms, conditions and provisions hereof and the entire understanding and all representations of understandings and discussions of the parties relating thereto, and all prior representations, understandings and discussions are merged herein and superseded and canceled by this contract.

B. Governing Law

This contract shall be governed by, subject to, and construed under the laws of the State of Oregon without regard to its conflict of law provisions. The parties intend that where this contract references federal or state law, if the law changes or new laws, rules, regulations or statutes are enacted that may affect any of the terms of this contract, the parties shall review the affected terms of this contract and conform it accordingly.

C. Assignment

The Valley School shall not, under any circumstances, assign, delegate, or contract with any entity to provide the educational program described in this contract. It is expressly understood that the charter granted by this contract to operate the educational program runs solely and exclusively to The Valley School.

D. Terms and Conditions of Application

The parties to this contract agree that the application for a charter submitted by The Valley School, the terms of which are incorporated by reference except as amended by any specific terms of this contract, sets forth the overall goals, standards and general operational policies of The Valley School but that the application is not a complete statement of every detail of The Valley School's operation. To the extent that The Valley School desires to implement specific policies, procedures or other specific terms of operation that supplement or otherwise depart from those in the application, The Valley School shall be permitted to do so provided that any such policies, procedures and terms of operation are consistent with the goals, standards and general operational policies set forth in this contract and in ORS Chapter 338.

E. Conflict between Application and Contract

The parties agree and acknowledge that should there be a conflict between any provision of this contract and the application submitted to the District by The Valley School, the contract provision(s) shall supersede any provision contained in the application.

F. District Liaison

The District shall designate, for purposes of this contract, the District Superintendent, or his/her designee, as the official District liaison between the District and The Valley School.

G. Amendment

This contract may be modified or amended only by written agreement between The Valley School and the District. The parties agree to modify or amend this contract in order to conform to any new and/or changed laws applicable to charter schools.

H. Notice

Any notice required, or permitted, under this contract, shall be in writing and shall be effective upon personal delivery (subject to verification of service or acknowledgment of receipt) or three (3) business days after mailing when sent by certified mail, postage prepaid, or email, to the party indicated in Section 12 J of this document.

I. Definition of Business Day

For purpose of this contract, "business day" means a day in which the District administrative offices are open. "Business day" does not include Saturdays, Sundays, official state holidays listed in ORS 336.010, federal holidays, any day(s) in which the administrative office is closed due to inclement weather or any day that the District administrative office is closed due to action taken by, or ordered to be closed by, the District Board of Directors or their designee, any instrumentality of the City of Medford, any instrumentality of Jackson County, the State of Oregon or federal government.

J. Address of Parties for Purpose of Written Notice

The following addresses are the addresses to be used when sending a written notice required by law or this contract:

Medford School District:
Attn: Superintendent Jeanne Grazioli 815 S. Oakdale
Medford, Oregon 97501

The Valley School:
Attn: Chair of the Board PO Box 1225
Medford, Oregon 97501

Should these addresses change, the parties agree to notify the other party within ten (10) calendar days of the address changing.

K. No Waiver

The parties agree that no assent, expressed or implied, to any breach by either of them of any one or more of the covenants and agreements expressed herein shall be deemed or to be taken to constitute a waiver of any succeeding or other breach.

L. Dispute Resolution

The intent of this dispute resolution process is to (1) minimize the oversight burden on the District, (2) ensure a fair and timely resolution to disputes, and (3) frame a charter oversight and renewal process and timeline so as to avoid disputes regarding oversight and renewal matters.

The District and The Valley School agree to work together to accomplish all tasks necessary to fully implement this charter, including the submission of any necessary and duly-prepared waiver requests to the State Board of Education.

Dispute Resolution Process: The staff, the Governing Board of The Valley School, and the District School Board agree to attempt to resolve all disputes regarding this Charter or other issues which may arise regarding The Valley School pursuant to the terms of this section in a timely, good-faith fashion. Both shall refrain from public commentary regarding any disputes until the matter has progressed through the dispute process.

In the event that The Valley School and the District have disputes regarding the terms of this charter or any other issue regarding the relationship between The Valley School and the District, both parties agree to first frame the issue in written form and provide it to the other party as indicated in 12 J of this document. The Chair of the Governing Board of The Valley School and the Superintendent of the District agree to meet informally and attempt to resolve the dispute. If this joint meeting fails to resolve the dispute, both parties agree to jointly identify a neutral, third party mediator. The format of the mediation session shall be developed jointly by the superintendent and the chair and shall incorporate informal rules of evidence and procedure unless both parties agree otherwise. The findings or recommendations of the mediator shall be non-binding, unless the governing boards of The Valley School and the District jointly agree to bind themselves. The Valley School may appeal to the State Board of Education concerning those matters within its jurisdiction under ORS Chapter 338.

Disputes arising from within The Valley School, including all disputes among and between students, staff, parents, volunteers, advisors, partner organizations and the Governing Board of The Valley School, shall be resolved pursuant to policies and processes developed by The Valley School.

The District shall not intervene in any such internal disputes without the consent of the Board of Directors of The Valley School and shall refer any complaints or reports regarding such disputes to The Valley School Board for resolution. The District agrees not to intervene or become involved in the dispute unless the dispute has given the District reasonable cause to believe that a violation of this charter or related laws or agreements has occurred, or unless the Governing Board of The Valley School has requested the District to intervene in the dispute.

M. Severability

If any provision of this contract is determined to be unenforceable or invalid for any reason, the remainder of this contract shall remain in effect, unless otherwise terminated by one or both of the parties in accordance with the terms of this contract.

N. Delegation

The parties agree and acknowledge that with regard to this charter agreement between the District and The Valley School, the functions and powers of the District Board may be exercised by the District Liaison, provided that any ultimate decision regarding renewal, non-renewal or revocation of this contract be made only by the District Board.

O. Prior Actions

It is expressly agreed and understood that as a condition precedent to this contract becoming effective on the effective date specified above in Section 2, The Valley School shall have taken, completed and satisfied on or before the date specified herein, any action or obligation which is required to be completed before such effective date, and failure to do so shall constitute grounds for the District to declare this contract null and void.

P. Attorney Fees

If any suit, action or arbitration is commenced or instituted to interpret or enforce the terms of this contract, to exercise any remedy on account of a default, or otherwise relating to the provisions of this contract, the prevailing party or non-defaulting party shall be entitled to recover from the losing or defaulting party its reasonable attorney fees and costs, in addition to all other sums provided by law, at trials or arbitration. Such sums shall be determined by the court or arbitrator.

Q. The Valley School Authority to Enter Into Contract

The Valley School expressly affirms that the signatories on its behalf who sign below have the authority to enter into this contract on behalf of The Valley School and that the Board of Directors of The Valley School has duly approved this contract. The Valley School Board shall provide a copy of its written resolution authorizing The Valley School to enter into this contract to the District.

IN WITNESS WHEREOF, the parties have executed this contract effective as of the date first set forth above.

MEDFORD SCHOOL DISTRICT

THE VALLEY SCHOOL

Medford School Board of Chair

The Valley School Board Chair

Date _____

Date _____

EXECUTIVE SUMMARY

Meeting Date:	June 18, 2026
Agenda Item:	Logos Public Charter School Contract Approval
Item Type:	Action Item
Administrator:	Todd Bloomquist
Objective:	Approval of Logos Public Charter School Contract

Background:

Logos has requested the District renew their charter with adjustments to consider as outlined in their renewal request letter received on December 10, 2025.

The District responded on December 11, 2025 of receipt of their request and formally responded on January 8, 2026, requesting more clarification/information and notifying that some of the requests will require further discussion. Logos responded to the District on January 30, 2026 at the on-site visit with further clarifications. On March 4, 2026, the subcommittees of each board met to discuss the changes to the contract. On April 14, 2026, the Medford School Board subcommittee met to discuss the changes to the charter contract.

A public hearing was held on February 19, 2026. According to [OAR 581-026-0400](#) the District must notify Logos of the decision to renew the charter contract or state the reasons in writing denying the renewal of the contract within 30 days of the public hearing.

An annual on-site visit was conducted on January 30, 2026.

Additional Materials:

[Draft Contract with Changes](#)

[Final Draft 2026-2036 Logos Public Charter Contract](#)

Recommendation:

Approve the updated Logos Public Charter contract agreement.

Suggested Motion:

“I move to approve the Logos Public Charter School contract for 2026-2036, to be effective July 1, 2026.”



Charter Contract

Between

Logos Charter School

&

Medford School District 549C

July 1, ~~2021~~2026 - June 30, ~~2026~~2036

Table of Contents

Contract	5
1. Grant of Renewed Charter	5
2. Conditions Precedent to Renewal of Charter	5
3. Effective Date	5
4. Educational Program	5
A. Age and Grade Range	5
B. Curriculum	5
C. Student Assessment/Graduation Requirements	6
D. Access to District Programs/Extracurricular Activities	7
E. Records	7
F. Non-religious and Non-discrimination	8
G. Open Enrollment	8
H. Notices for Enrollment and Withdrawal of Non-Resident Students	9
I. Student Attendance, Conduct and Discipline	10
J. Education of Special Populations	11
K. Tuition and Fees	14
L. Student Welfare and Safety	14
M. School Year; School Day; Hours of Operation	15
N. Alternative Education Model	15
O. Accreditation	15
5. Evaluation of Student Performance and Procedures for Corrective Action	15
6. Economic Plan, Budget and Annual Audit	17
A. Funding	17
B. Budget	18
C. Financial Records, Audits and Accounting Reports	18
7. Building and Facilities	21
8. Governance and Operation	21
A. Corporate Status	21
B. Non-religious, Non-sectarian Status	22
C. Non-discrimination	22
D. Public Meeting and Public Records	22
E. School Board	22
F. Website	23
G. Operational Powers	23
H. Third Party Contracts	23
I. Annual Report and Review	24
J. Term	25

K. Termination	25
L. Dissolution	27
M. Property Inventory Control	27
9. Employment Matters	28
A. Criminal Background checks, Sexual Conduct Clearance, and Pre-employment Drug Screen.	28
B. Teacher and Administrator Licensure/Registration Requirements.	29
C. Logos Responsibilities	29
10. Insurance and Legal Liabilities	30
A. Insurance	30
B. Legal Liabilities	30
C. Waiver	32
D. Full Faith and Credit	32
E. Indemnification	32
F. District Disclaimer of Liability	33
G. ADA/§504 Obligations	34
H. Transportation	34
11. Renewal of Contract	34
12. Miscellaneous Provisions	36
A. Entire Agreement	36
B. Governing Law	36
C. Assignment	36
D. Terms and Conditions of Application	36
E. Conflict between Application and Contract	37
F. District Liaison	37
G. Amendment	37
H. Notice	37
I. Definition of Business Day	37
J. Address of Parties for Purpose of Written Notice	38
K. No Waiver	38
L. Dispute Resolution	38
M. Severability	39
N. Delegation	39
O. Prior Actions	40
P. Attorney Fees	40
Q. Exhibits	40
R. Logos Authority to Enter Into Contract	40

CHARTER SCHOOL CONTRACT

THIS CONTRACT dated effective as of July 1, ~~2021~~2026 is made and entered into by and between the Medford School District 549C ("District") and Logos Charter School ("Logos") an Oregon nonprofit corporation.

RECITALS

WHEREAS, the Oregon Legislature has enacted ORS Chapter 338 for certain purposes enumerated in that chapter; and

WHEREAS, the District and Logos are currently parties to a charter school contract dated July 1, ~~2016~~2021, which contract has a term of July 1, 2021 through June 30, 2026; and

WHEREAS, on December ~~4, 2020~~8, 2025, a renewal request (attached and incorporated as Exhibit A) was submitted by Logos to District for the continuation of Logos as a charter school to operate within District; and

WHEREAS, the District School Board held a public hearing on February ~~4, 2021~~19, 2026 on the provisions of the proposal in accordance with the ORS Chapter 338 and evaluated the criteria set forth in ORS Chapter 338; and

WHEREAS, THE RESOLUTION ADOPTED by the District Board on February ~~18, 2021~~19, 2026, a copy of which is attached and incorporated herein as Exhibit D, approved the renewal of the charter contingent upon the negotiation and execution of a contract acceptable to Logos and District; and

WHEREAS, this contract between Logos and the District, including the Exhibits, will constitute the full and complete agreement between the parties regarding the governance and operation of Logos; and

WHEREAS, the parties desire that Logos be authorized to operate and conduct its affairs in accordance with the terms of this agreement and ORS Chapter 338; and

WHEREAS, Logos continues to be an established non-profit organization under the laws of the state of Oregon, exempt under 501(c)(3) of the Internal Revenue Code, and is not associated with a nonpublic sectarian school or a religious institution, or otherwise religious based;

NOW, THEREFORE, in consideration of the foregoing recitals and the mutual understandings, releases, covenants and payments herein described, the parties agree as follows:

Contract

1. Grant of Renewed Charter

Logos is granted, in accordance with ORS Chapter 338 and the terms and conditions of this contract, a renewed charter to operate a single public charter school located within the boundaries of the District as described herein.

2. Conditions Precedent to Renewal of Charter

In order for Logos to continue to operate as a public charter school sponsored by the District under a renewed charter contract, the following conditions shall be met:

- A. Logos shall remain in compliance with all provisions of the existing charter contract and with all state and federal laws governing public charter schools for the remainder of the ~~2020-2021~~2025-26 school year.

3. Effective Date

This contract shall commence on July 1, ~~2021~~2026, and shall expire on June 30, ~~2026~~2036, unless sooner terminated pursuant to the provisions herein.

4. Educational Program

A. Age and Grade Range

- i) Beginning with the commencement of the ~~2021~~2026 school year and continuing throughout each school year during the term of this contract, Logos shall provide instruction to students in kindergarten through the twelfth grade.
- ii) In accordance with Medford School District policy, Logos shall only enroll a student in its kindergarten program if the student has reached the age of five (5) on or before September 1 of the year the student is seeking enrollment. Logos shall only enroll a student in its first grade program if the student has reached the age of six (6) on or before September 1 of the year the student is seeking enrollment.
- iii) Exceptions may be made to (ii) above in accordance with any exceptions allowed by District board policy JEBA -Entrance Age.

B. Curriculum

District agrees to waive its curricular requirements, to the extent permitted by Oregon law, but subject to the provisions of this Section 4.B.

- (i) Logos shall have the authority and responsibility of designing and implementing its educational program, subject to the conditions of this contract, in a manner which is consistent with state law.
- (ii) The educational program, pupil performance standards and curriculum designed and implemented by Logos shall be aligned to, and meet or exceed any content standards adopted by the State of Oregon and shall be designed to enable each pupil to achieve such standards.
- (iii) Logos agrees to comply with all state requirements concerning academic content areas as defined in ORS 329.045.
- (iv) Logos' core curriculum materials offered to students/families will meet Oregon State Standards. Logos will provide to the District an outline of its core curriculum and educational program upon request.
- (v) Logos shall adhere to the philosophy and mission, goals and objectives, and curriculum as set forth in addendum Exhibits F & G, the terms of which are incorporated herein by reference except as may otherwise be amended by the terms of this contract and any fundamental changes thereto shall require the prior written consent and approval of the District. A "fundamental change" is defined as changing the academic focus of Logos, its philosophy or mission, or adopting a curriculum that does not meet District or state standards. The District, in its sole discretion, may approve or disapprove of any such fundamental change.
- (vi) Logos shall maintain and publish to their website and prominently displayed at the school a written policy for resolving complaints against Logos, including complaints regarding curriculum. ~~— A current copy of the policy shall be provided to the District prior to July 1, 2021, and revised copies will be provided to the District each time any changes are made to the complaint policy.~~ will be available on the charter school's website and posted within the building.

C. Student Assessment/Graduation Requirements

- (i) All students enrolled and attending Logos shall participate and take part in all mandatory statewide and federal assessments developed by the Oregon Department of Education under ORS 329.485, as well as any assessment required of public charter schools by the Oregon Department of Education, the United States Department of Education or the Oregon Legislature to implement the Every Student Succeeds Act (ESSA) assessment requirements. All Logos families will have access to opt out procedures in accordance with state law

and district policies. All costs associated with administering and scoring the required assessments, as well as training, shall be paid for by Logos unless otherwise agreed to by the District in writing (see Technology Matrix – Exhibit I).

- (ii) The graduation requirements of Logos will be at or above the minimum requirements of the Oregon Department of Education.
- (iii) In addition to the required state or federal assessments described in section 4.C(i), Logos is required to participate in the common district diagnostic assessment window for Kindergarten through 8th grade. Unless required by law, any other district-required assessments are not required for Logos.

D. Access to District Programs/Extracurricular Activities

Logos students are allowed to participate in interscholastic activities listed in OAR 581-026-0005, -0700, -0710 in the district in which they reside. The law allows for a fee of up to 5% of the district general purpose grant per ADMw to be paid to the district from the charter school. This is a 5% maximum regardless of the number of activities the student participates in. The district can charge an additional 5% for activities that require enrollment in a course for credit. Students must adhere to state laws, Board policies, regulations and rules concerning conduct and discipline, including OSAA rules and regulations, and are subject to any fees.

E. Records

- i) Logos shall comply with all record keeping requirements of state and federal law pertaining to student records and shall cooperate with the District by providing any reports or records to the District, as necessary, to meet the District's reporting obligations to the Oregon Department of Education or the U.S. Department of Education. Student records include, without limitation, immunization records, class schedules, records of academic performance, disciplinary actions, attendance, documents required pursuant to the statewide assessment system under ORS 329.485, and any documents required under federal and state laws regarding the education of students with disabilities.
- ii) Logos shall comply with all applicable federal and state laws concerning the maintenance, retention and disclosure of student records, including, without limitation, the Oregon Public Records

Law.

- iii) Logos shall maintain up-to-date student records including enrollment, attendance and behavior in the District 549C Student Information System ~~(SIS)~~.

F. Non-religious and Non-discrimination

The educational program of Logos shall be non-religious and non-sectarian. Logos shall conform to all state and federal statutory and constitutional provisions prohibiting discrimination and shall not discriminate against any student or staff member on the basis of race, creed, color, sex, national origin, religion, ancestry, disability, marital status, sexual orientation, **gender identity** or political beliefs and/or affiliations.

G. Open Enrollment

- i) Student enrollment in Logos shall be voluntary. All students, including students with disabilities, who reside in the District and meet legal age requirements applicable to a grade level will be eligible for enrollment if space is available.
- ii) As provided in ORS 338.125(2), if space is available, Logos may admit students who do not reside in the District. ~~Within each phase of the enrollment process, preference will be given to residents of the District.~~
- iii) As provided in ORS 338.125(3)(b), Logos may give admissions preference to 1) students who were enrolled in the prior year, unless expelled and 2) applicants who have siblings who are presently enrolled and who were enrolled in the prior year. Any additional preferences not specifically outlined in laws governing charter school operations in the State of Oregon will require the submission of a waiver approved by the Oregon State Board of Education prior to implementation of said preference for admission status.
- iv) Maximum school enrollment for the ~~2021-22~~**2026-27** school year shall be an average for the year of ~~1160~~**1329** students. ~~It shall be 1210 for 2022-23 school year, 1260 for the 2023-24 school year, 1310 for the 2024-25 and 2025-26 school years.~~ **By 2031, the maximum average enrollment shall be 1500 with measured growth between years 2027-2031.** Expansion of Logos outside of the above numbers would be determined by Medford Charter Subcommittee on Charter Request (Exhibit H) and approved by the Medford School Board. It would be determined by the strength of the infrastructure of Logos and the academic success of Logos students.

- v) If the maximum enrollment set forth in Section 4.G.iv is met, a lottery process will be implemented conforming to ORS Chapter 338. Using the lottery process Logos shall establish a waiting list of students who shall be offered the opportunity to enroll at Logos if additional space later becomes available. The waiting list shall carry over to subsequent years.
- vi) Logos shall not permit concurrent enrollment of any student at both Logos and another public school.
- vii) The minimum enrollment for each school year shall be 25 full-time students. The District shall have the right to terminate this contract at a semester break if student enrollment in Logos falls and remains under 25 students for twenty (20) or more days during any school year, as provided in ORS Chapter 338. For purposes of this contract, “full-time student” means a student who is receiving more than one-half of his/her instructional program at Logos.

H. Notices for Enrollment and Withdrawal of Non-Resident Students

- (i) Logos shall provide the District with written notice of the enrollment of any student who does not reside within the District. Such notice shall be provided within ten (10) days of the enrollment. Within ten (10) days of enrollment, Logos shall provide to the student’s parent, legal guardian or person in parental relationship written information about:
 - a. The District’s responsibility to identify, locate and evaluate students enrolled in Logos to determine which students may be in need of special education and related services as provided by ORS 338.165; and
 - b. The methods by which the District may be contacted to answer questions or provide information related to special education and related services.
- (ii) Logos shall provide the District with written notice of the withdrawal from Logos for any reason other than graduation from high school of any student who does not reside within the District. Such notice shall be provided within five (5) business days of the withdrawal. Within five (5) business days after receiving such notice, the District shall:
 - a. Provide to the school district in which the student resides written notice that the student has withdrawn.
 - b. Provide to the student’s parent, legal guardian or person in parental relationship written information about:

1. The responsibility of the school district in which the student resides to identify, locate and evaluate students who reside in the school district to determine which students may be in need of special education and related services as provided by ORS 338.165; and
2. The methods by which the school district in which the student resides may be contacted to answer questions or provide information related to special education and related services.

I. Student Attendance, Conduct and Discipline

- i) Logos shall implement a system of uniform student discipline consistent with Oregon law. ~~A current copy of the adopted discipline policy was provided to the District on July 1, 2017, and r~~Revised copies will be provided to the District each time any changes are made to the policy.
- ii) Logos shall notify its students and parents of the student rights and responsibilities at the beginning of each school year, or as the student meets the admission requirements as stated in this contract. Student rights and responsibilities will also be published in the parent handbook.
- iii) Logos shall maintain up-to-date enrollment information using District student information system. Enrollment information shall be entered no later than the close of the day the student starts in classes, and attendance information shall be entered on at least a weekly basis, with monthly reports provided to the District.
- iv) Logos shall notify the district in which the student resides immediately upon a student being expelled from Logos and provide a copy of the written expulsion notice. All suspension and expulsion records shall be entered in the District student information system and a detailed written notice of student expulsions provided to the District within 3 business days of the event.
- v) Logos and the District shall honor the suspension and expulsion of a student of the other, unless both parties agree in writing to a variance from this requirement.
- vi) Truancy - Student attendance at Logos will be in compliance with Oregon compulsory attendance laws. Per state law, Logos shall drop any student who is unaccounted for after 10 consecutive school

days. Staff will make every available attempt to locate a student's whereabouts prior to dropping them.

vii) Logos will comply with Oregon Department of Education's requirements for claiming and recording attendance.

viii) Academic Expectations - LPCS and an enrolling child's parent or learning coach will annually agree prior to enrollment that at any time when the student is not making a minimum of one year's progress in all subjects and/or not working towards meeting or exceeding academic standards, objectives, goals, or grade level benchmarks for the year, an academic plan of assistance and/or intervention with Logos administration may be held to help resolve any and all issues in order to get the student back on track. The parent or learning coach also agrees annually that if an academic plan of assistance or intervention is not followed or if they choose not to attend a scheduled intervention or meeting to discuss the child's progress, that it may result in the student's withdrawal from Logos. Logos is a school of choice and only following the agreed upon academic plan can a student stay enrolled in the school. The parent will be strongly encouraged to enroll their child in another program in which the student can be more successful.

J. Education of Special Populations

i. Education of Talented and Gifted Students

Logos shall comply with ORS 343.391 - 343.413 and administrative rules adopted by the State Board of Education for implementing these statutes. Logos will provide identified TAG students with instruction commensurate with their rate and level of learning. Logos will have access to district TAG forms but will not be required to use them. Logos will establish a TAG process that complies with state law.

Education of English Language Learners (ELL)

ii. Logos shall identify ELL students and provide them with language acquisition instruction by a qualified instructor. The District may be contracted for these services and thus would retain the additional ADM for that service.

iii. Education of Students with Disabilities

a. Special Education

1. Logos will include the following notification in the parent/student handbook, website, and other parent materials.

The Medford School District has the responsibility to identify, locate, and evaluate to determine a student's needs for special education and related services and to provide those special education services at the charter school. The Medford School District holds this responsibility for all students enrolled in a district-sponsored charter school, regardless of where the student resides.

If you have questions about special education evaluations and services, please contact the Medford School District's Special Education and Student Services Office at 541.842.3628.

2. Upon ~~application and completion of a registration packet by~~enrollment of a student with a disability at Logos, Logos will notify the resident district of the student's enrollment by requesting records, including special education records, from the previous school. The District, as the sponsoring district, will convene an Individualized Education Program (IEP) meeting with individuals knowledgeable about the student to evaluate the student's individual needs and to determine an appropriate placement for the student. The parent, school, and District staff will be included in this meeting.
3. ~~Students with disabilities admitted to Logos shall be afforded the same opportunities to be appropriately placed as if the student was admitted to a traditional public school with District.~~
4. ~~If the IEP team determines the student's educational needs cannot be met at Logos, an alternate placement will be recommended in a traditional public school with the resident district.~~
4. Students with disabilities who are enrolled in Logos shall be provided with programs implemented in accordance with federal and state laws and local policies and procedures, specifically the Individuals with Disabilities Education Improvement Act (IDEIA), Section 504 of the Rehabilitation Act of 1973, Oregon

Administrative Rules (OARs), and the District's School Board Policies and procedures related to special education. Copies of the District's policies and procedures will be provided to Logos.

5. The District Board Policies related to students with disabilities that will be adhered to by Logos include, but are not limited to:

IGBAE/ IGBAE-AR—Special Education:
Participation in Regular Education Programs

JGDA/ JGDA-AR—Discipline of Students with
Disabilities

6. The District Special Education Procedures related to students with disabilities that will be adhered to by Logos in collaboration with the District include, but are not limited to:

1. Child Find,
2. Pre-Referral Process,
3. Screenings for Students Not Eligible for Special Education,
4. Request for Special Education Evaluation,
5. Individualized Education Program, and
6. Student Behavior and Discipline

7. The District, as the sponsoring district, is the responsible party to provide a Free Appropriate Public Education (FAPE) to each eligible student with a disability enrolled in Logos. ~~All special education and related services will be provided on site at Logos, unless the District, Logos, and parents agree to other arrangements.~~ Logos shall be responsible to implement the accommodations and modifications as outlined in the student's IEP.

8. Transportation for special education students will only be provided to a student attending Logos if it is ~~based on student need and is documented~~ included as a related service on the student's IEP.

(iv) Section 504

Logos will provide reasonable accommodations to students with a physical or mental impairment that substantially limits a major life activity if and to the extent required to enable such students to have an opportunity to be successful in their educational program equal to that of their non-disabled peers. Logos shall prepare a 504 Accommodation Plan ~~for all such students who do not have an IEP~~ in accordance with Section 504 of the Rehabilitation Act and its implementing regulations.

(v) Training Related to Special Education and Section 504

Logos may request training related to special education, students with disabilities, and Section 504, at no charge, from District.

K. Tuition and Fees

Logos shall not charge tuition to students attending Logos. Logos shall not charge tuition for programs, classes or courses of study which are part of the regular school program. Logos may charge reasonable deposits and fees in accordance with ORS 339.155 for optional, ~~after school~~ programs and student activities.

L. Student Welfare and Safety

Logos shall comply with all applicable state and federal laws concerning student welfare, safety and health, including, without limitation, the reporting of **sexual conduct** and child abuse, accident prevention and disaster response, and any local, state or federal regulations governing the operation of school facilities and submit to the District a plan for training of staff in these areas as well as documentation of completion.

6.1.1.1. Logos is responsible for the reporting of **sexual conduct**, child abuse and neglect in accordance with state law.

6.1.1.2. Logos shall immediately inform the District Liaison of any incident regarding **sexual conduct**, child abuse and/or neglect.

6.1.1.3. Logos shall comply with state and federal law relating to drug administration to students.

- i) Logos shall comply with OAR ~~548~~4-020-0041, the Teacher Standards and Practices Commission requirements that the chief administrator report certain acts of gross neglect of duty by licensed staff.

- ii) Logos shall participate in the safe schools online trainings offered by the District including **sexual conduct and** child abuse reporting, blood-borne pathogens, etc. All staff will be trained by October 31 of each year.

M. School Year; School Day; Hours of Operation

Logos shall operate an instructional program in accordance with Section 4.B of this contract, unless otherwise stated in this contract. The school calendar shall be similar but may vary from the District's school calendar. Logos will meet or exceed all instructional hour requirements in OAR 581-022-~~2231-620~~. Logos will determine and publish its school calendar annually, and will provide a copy to the District ~~and the public no later ten (10) business days after the Medford School District calendar has been approved.~~ **by May 1.**

Logos will ensure when providing the calendar that it has scheduled enough instructional hours to comply with ODE's directive of minimum instructional hours required by law. In order to be in compliance with the provision that a student must "have access to appropriately licensed or registered teachers for every day of enrollment in which state school funding is claimed" Logos licensed and registered teachers will respond to any communication from a student in a timely manner. Any communication by a student directed to an appropriately licensed teacher must be responded to within 24 hours. If communication occurs on a weekend, holiday, or break, the teacher must respond within 24 hours of the next school day. If the student's regular education teacher is unavailable (professional development, sick, on leave, or otherwise inaccessible), a different appropriately licensed teacher may respond in place of a student's regular teacher.

N. Alternative Education Model

Subject to applicable state law, federal law, and the terms of this contract, Logos shall be allowed to promote and implement learning situations that are flexible with regard to environment, time, structure and pedagogy.'

O. Accreditation

Logos shall maintain accreditation at the high school level.

5. Evaluation of Student Performance and Procedures for Corrective Action

- A. Logos shall pursue and make reasonable progress toward achievement of the goals, objectives and student performance standards consistent with

those set forth in this section, provided that such goals, objectives and student performance standards shall at all times remain in compliance with Oregon law and the provisions of this contract. Logos shall summarize its progress toward meeting these academic goals in the annual report to the District.

- B. Logos will assure that Logos will produce similar results in core subjects of students meeting or exceeding state and District academic performance standards for their like age group schools (Smarter Balanced, Oregon State grade-level benchmark assessments, Graduation rates) and that all Logos students will be encouraged to participate in the standard District-wide assessments required by the State of Oregon per Oregon assessment procedures, and in accordance with state opt out laws.
- C. For purposes of Section 5, paragraph B of this contract, the data will be disaggregated by the following student groups when comparing student assessment scores:
 - i) ~~racial~~/ethnicity
 - ii) students with disabilities
 - iii) limited English proficient (LEP)
 - iv) economically disadvantaged
 - v) grade level

For purposes of this contract, student assessment scores shall be compared by student groups when there are a statistically significant number of students in that group. The term “statistically significant” shall mean six (6) or more students.

- D. Logos will ~~provide a School Improvement Plan (SIP) subject to District timelines and guidelines. The SIP shall include baseline data, improvement goals, an action plan and an evaluation of the school's progress toward meeting its goals. If the percentage of Logos students meeting or exceeding the standards on the state assessment tests at any grade level is not at or above the percentage of the District's students who meet or exceed the standards at that grade level for any year, Logos shall revise, subject to the District's approval, the SIP, describing the actions that Logos will undertake to improve student achievement. The SIP~~engage in a continuous school improvement process through its participation in the Oregon Department of Education's Integration Grant, which is submitted through the District. The required plans, including baseline data, improvement goals, action steps, and progress monitoring, are developed, maintained, and reported in accordance with ODE Integration Grant requirements and can be accessed

through that process. Through the Integration Grant agreement and submission, the District has access to all relevant data and reporting associated with Logos' school improvement efforts. Logos will implement and monitor these plans as part of its ongoing commitment to improving student outcomes, and progress will be updated reviewed annually and reviewed as a as part of the District's annual review of Logos. —

- E. If, following any revisions under Section 5.D, above, Logos' student assessment scores by subgroup and grade level are not at or above the District's assessment scores by subgroup and grade level for a second consecutive year, then the District may take action to direct school improvement. If satisfactory improvement is not made, the district may take action to terminate the charter contract under Section 8, item K.
- F. If Logos fails to follow any of the actions stated in any of the SIP as stated above the District shall issue a written notice to Logos that it must comply with the terms of the SIP immediately. If, after fifteen (15) business days, Logos is not in compliance with the SIP, the District may begin the process of terminating Logos' operation as a public charter school under Section 8, paragraph I of this contract.
- G. Logos may request the District's average score for its students that have taken the statewide assessment within ten (10) business days of the District receiving those scores.

6. Economic Plan, Budget and Annual Audit

A. Funding

- (i) Except as provided in Section 6.A.(ii) of this contract, the District shall provide funding to Logos an amount per weighted average daily membership (ADMw) of Logos that is equal to 80 percent of the amount of the District's general purpose grant per ADMw as calculated under ORS 327.013 for Logos students in grades kindergarten through eighth and 95 percent of the amount of the District's general purpose grant per ADMw as calculated under ORS 327.013 for the Logos students in grades ninth through twelfth. Funding shall be determined based on monthly ADMw reports provided to the District by Logos, with an annual reconciliation after the District receives the final ADMw report from the Oregon Department of Education. So long as Logos is not in violation of ORS Chapter 338, this funding will be made available to Logos, commencing on the date set forth and according to the distribution schedule set forth in Section 6, paragraph C, subparagraph (vi) below. The District will adjust the funding to reflect the actual funded

pupil count as of October 1 of each year. In addition, to the extent the District experiences any reduction or increase in its state funding, proportionate reductions or increases will be made to Logos by adjustment or setoff in subsequent months. This amount is calculated by the Oregon Department of Education and provided to the District on the State School Fund District Estimate that the Department of Education periodically provides to school districts.

- (ii) Pursuant to ORS 338.165, if a student is enrolled in Logos and is eligible for special education and related services, an additional amount shall be added to the ADM of Logos as described in ORS 327.013(1)(c)(A)(i). The payment per ADMw in Logos that is attributable to the student who is eligible for special education and related services shall equal an amount that is at least equal to: (a) 40% of the amount of the General Purpose Grant per ADMw for the District, as calculated under ORS 327.013, for students who are enrolled in kindergarten through eighth grade; and (b) 47.5% of the amount of the General Purpose Grant per ADMw for the District, as calculated under ORS 327.013, for student who are enrolled in ninth grade through twelfth grade.
- (iii) The District shall provide funding to Logos consistent with the requirements of ORS 338.157.
- (iv) Any financial commitment on the part of the District contained in this contract is subject to appropriation by the State of Oregon and the parties agree that the District has no obligation to fund Logos' operations except as expressly provided herein or in ORS Chapter 338.

B. Budget

- (i) On or before May 5 of each year, Logos shall submit to the District Logos' projected enrollment and proposed budget for the upcoming school year.
- (ii) On or before July 1 of each year, Logos shall submit to the District Logos' adopted budget for the upcoming school year.
- (iii) Logos shall be responsible for all costs of subcontracting for goods and services, except as expressly provided in this contract.
- (iv) The fiscal year of Logos shall begin on July 1 of each year and end on June 30 of the subsequent to coincide with the District's fiscal year.

C. Financial Records, Audits and Accounting Reports

At all times, Logos shall maintain appropriate governance and managerial procedures and financial controls including, but without limitation, (a) accounting and financial record keeping procedures which reflect Generally Accepted Accounting Principles (GAAP); (b) procedures for cash management, investment practices and financial reporting; (c) balance sheets reflecting assets, expenditures and liabilities; (d) segregation of duties for individuals performing cash management and investment practices; and (e) processes reflecting annual review of such systems by both Logos and the District. Logos' accounting methods shall be compatible with the budget and accounting system of the District, and shall comply in all instances with applicable governmental accounting requirements that explicitly apply to charter schools. In addition:

- (i) Logos agrees to establish, maintain and retain appropriate financial records in accordance with applicable state and federal laws and to make such records available to the District. Within 60 days of the end of each month Logos shall submit to the District monthly income and expense reports, as well as a monthly balance sheet showing liabilities and assets. Upon request Logos will provide an Aged Accounts Payable statement showing any accounts that are 30, 60, 90 or 90+ days past due within 10 days of the District's request to do so.
- (ii) Logos shall have an annual audit of its accounts in accordance with Municipal Financial Audit Law, ORS 297.405 to 297.555 and 297.998-999. ~~If feasible, Logos will use the same auditor as MSD.~~ Logos will utilize an independent, third-party, certified auditor to conduct all required annual audits. The selected auditor will have demonstrated experience serving schools of similar size and complexity or greater. Logos shall submit this audit, along with copies of letters from Logos' auditor to the Logos board of directors, to the District by December 15 of each year. In addition, Logos shall provide a copy of the audit report to Oregon Department of Education and the State Board of Education.
- (iii) Logos shall submit Logos' Internal Revenue Service Form 990 to the IRS by the 15th day of the 5th month following the end of its fiscal year (November 15), or within any extension approved by the IRS, and shall provide a copy to the District ~~within 10 days of filing~~ upon request.
- (iv) Logos shall operate in accordance with generally-accepted accounting procedures (GAAP) or other generally-accepted standards of fiscal management, provided that Logos' accounting

methods shall comply in all instances with applicable governmental accounting requirements.

- (v) Logos shall maintain up-to-date enrollment using the District SIS.
- (vi) The District shall distribute to Logos funds as determined in Section 6, paragraph A of this contract, in the following amounts on or before the following dates for each school year:
 - July 25 - 16.66 percent
 - August 25 - 8.33 percent
 - September 25 - 8.33 percent
 - October 25 - 8.33 percent
 - November 25 - 8.33 percent
 - December 25 - 8.33 percent
 - January 25 - 8.33 percent
 - February 25 - 8.33 percent
 - March 25 - 8.33 percent
 - April 25 - 8.33 percent
 - May 25 - balance
- (1) An annual reconciliation adjustment per ODE final ADMw calculation will occur after the District receives the report.

The parties mutually agree that the above payment schedule is intended to follow the disbursement schedule of State School Fund payments to the District under ORS 327.095. The parties further agree that should the disbursement schedule of the State School Fund be modified during the term of this contract, the disbursement schedule of payments from the District to Logos shall be modified to reflect such changes. The District shall still be required to transfer the payment due Logos under this contract within ten (10) days of the receipt of such payment from the State School Fund.

- (vii) In the event that this contract is revoked, terminated or not renewed by the District, Logos shall refund to the District all unspent public funds that were given to Logos by the District other than the amount

sufficient to cover all accrued, but unpaid expenses.

- (viii) The parties acknowledge that under ORS 338.155(9)(b) Logos is entitled to other state sources of funds, such as grants from the Oregon Department of Education that are available to school districts based solely on the weighted average daily membership (ADMw) of the school district which are not included in this contract and/or which are not part of the state school fund formula. Logos will only be eligible to receive grant funds from the District if Logos students were used in grant application calculations and Logos is providing the services for students qualifying for funding.
- (ix) The parties acknowledge that under ORS 338.155(9)(a) Logos may apply for any grant that is available to school districts or non-chartered public schools from the Oregon Department of Education.
- (x) Logos may accept gifts, donations or grants pursuant to ORS Chapter 338, provided that no such gifts, grants or donations may be accepted if contrary to applicable law or the terms of this contract. In the event that Logos solicits funding from other sources than the District, it shall comply with all applicable state and federal laws regarding reporting of such charitable solicitations. ~~Logos shall annually report all gifts, donations and grants to the District by recording same in the financial records described in Section 6, paragraph C above.~~

- D. Notwithstanding Section 6, paragraph A and Section 6, paragraph C, subparagraph (vi) of this contract, if Logos has not submitted the proposed budget, the adopted budget, the annual audit or any other financial information the District requests by the date Logos is to provide the information to the District, the District ~~shall~~ **may** withhold any and all State School Fund payments to Logos until the information is received by the District.

7. Building and Facilities

- A. Logos will be located at a school facility within the District boundaries. Currently, Logos' facility is located at 1203 N. Ross Lane, Medford, Oregon 97501. Logos shall take the necessary steps to obtain and maintain in full force and effect throughout the term of this contract the appropriate and necessary occupancy permits and any other health and safety permits and approvals for the operation of a charter school at the facility. Certification of such permits and approvals shall be submitted to the District by September 1 of the first year of occupancy and then on September 1 of any year in which there was a change requiring new permits and approvals.

- B. Logos may change its physical location or obtain additional facilities within the District boundaries provided that Logos fulfills the obligations and provides the information set forth in this section with respect to such new or additional facilities and provided further that Logos notifies the District of the proposed change in location or addition of facilities not less than thirty (30) calendar days prior to taking any final action in connection therewith.
- C. Logos may locate satellite hubs to support students in other areas as long as its main location is within district boundaries.

8. Governance and Operation

Logos shall govern and operate the charter school to the extent permissible under federal and state law and subject to all conditions of this contract.

A. Corporate Status

Logos is and shall remain for the term of this contract an Oregon nonprofit corporation. In addition, Logos is and shall remain for the term of this contract an organization exempt from taxation under Section 501(c)(3) of the Internal Revenue Code. Logos shall not make any changes to its Articles of Incorporation or bylaws which would or could result in a fundamental change to the educational program or curriculum described in Section 4 of this contract without the prior written approval of the District. Within thirty (30) days after making any changes to its Articles of Incorporation or bylaws, Logos shall notify the District of any changes Logos makes to such documents. ~~Logos shall also provide to the District prior to July 1, 2021 a current organizational chart and revised copies will be provided to the District each time any revisions are made.~~

B. Non-religious, Non-sectarian Status

Logos agrees that it shall operate in all respects as a non-sectarian, non-religious public charter school. Logos shall not be affiliated with any non-public sectarian school or religious organization.

C. Non-discrimination

Logos shall comply with all federal and state laws regarding non-discrimination, including without limitation, statutory and constitutional provisions prohibiting discrimination on the basis of disability, age, race, creed, color, sex, **gender identity**, national origin, religion, ancestry, marital status, political beliefs and/or affiliations, or sexual orientation.

D. Public Meeting and Public Records

Logos and its Board of Directors are subject to the provisions of Oregon Public Meetings Law, ORS 192.610 to 192.690-705 and Oregon Public Records Law, ORS 192.410-311 to 192.478505.

Logos shall submit their School Board minutes to the district within two (2) weeks after each meeting.

E. School Board

Logos shall have an elected governing Board consisting of five to nine members: up to three parents, up to two charter school staff or their family members, three to eight members of business community, and the administrator of the school. LPCS recognizes the potential conflict of interest that exists with school employees on the governing board. However this potential conflict must be weighed against the importance of having all stakeholders involved in governance of the school.

The school bylaws will also permit the superintendent of Medford to assign a designee to serve on the charter school's governing board as a non-voting board member.

The LPCS board will comply with all policies and regulations of the Oregon Ethics Commission and will be retrained periodically on those regulations.

F. Website

Logos shall maintain a website with important information such as contact information, complaint policy, and a link to the sponsoring district's website.

G. Operational Powers

Subject to the conditions and provisions of this contract, Logos through its Board of Directors shall be fiscally responsible for its own operations within limitations of any funding provided by the District and other revenues derived by Logos consistent with law.

- (i) Logos shall have the authority to exercise independently, also consistent with federal and state law, all powers granted to nonprofit corporations and charter schools so long as such powers are not inconsistent with the terms of this contract, including without limitations the following powers (and including such other powers as provided for elsewhere in this contract): making all personnel decisions, including hiring, firing and discipline of all teachers, supervisors, and staff; contract for goods and services necessary for

the operation of Logos; prepare a budget; procure insurance and necessary bonds; lease facilities for school purposes; purchase, lease or rent furniture, equipment and supplies; retain fees collected from students in accordance with law; organize and carry out fund-raising efforts; and accept and expend gifts, donations or grants of any kind in accordance with such conditions prescribed by the donors as are consistent with law and not contrary to any of the terms of this contract.

- (ii) Notwithstanding the above, unless purchased through the District, contractual services and purchases of supplies, materials and equipment purchased with public funds in excess of \$5,000.00 shall be procured through a system of competitive bidding as required by state and federal law.

H. Third Party Contracts

Except as may otherwise be prohibited by the terms of this contract or Oregon law, Logos may contract with third parties to provide personnel and services necessary for or incidental to the operation of Logos, including but not limited to the recruiting, hiring, and compensation of any such personnel, so long as:

- (i) Logos' governing board does not control the operations of the third party;
- (ii) Logos at all times maintains a right of control and final decision making authority over those decisions that involve the governmental function of providing a public education, including but not limited to the authority to develop and modify its curriculum, to ensure that instruction is consistent with the approved curriculum, to make decisions affecting its students' access to education, including but not limited to disciplinary decisions, and to make decisions regarding the hiring, firing and discipline of all teachers, supervisors and staff providing services to Logos;
- (iii) Logos at all times maintains and provides procedural safeguards to affected members of the public in relation to those aspects of Logos' operations that constitute the governmental function of providing a public education, including but not limited to procedures to allow persons to seek redress from Logos as a result of the contractor's actions; and
- (iv) As provided in Section 10.E of this contract, Logos agrees to defend, indemnify and hold the District free and harmless from any

and all claims and/or liability of any kind or nature arising out of any such third party contracts entered into by Logos.

I. Annual Report and Review

- (i) By January 1 of each year, Logos shall prepare and submit to the District and the State Board of Education ~~an annual report which will include, without limitation,~~ the following:

¶

~~(a) Information on the performance of the school overall, including summary enrollment levels, attendance rates, student conduct and discipline data, an analysis of the students' progress toward meeting academic goals and objectives, summary data on the accomplishment of the school's educational program and operational goals, an outline of goals for the upcoming year along with an action plan to achieve those goals and evaluation plan to measure attainment of those goals; ¶~~

¶

~~(b) The audit and financial statements required under Section 6 paragraph C of this contract, including proof of insurance; ¶~~

¶

~~(c) Policy development issues; ¶~~

¶

~~(d) Student discipline information; and ¶~~

¶

~~a. Any other information the District reasonably deems necessary to demonstrate that Logos is in compliance with state and federal law and the terms of this contract.~~

a. An annual report that reflects the school's performance, progress, and ongoing improvement efforts. As part of this process, Logos engages in a continuous school improvement cycle through its participation in the Oregon Department of Education's Integration Grant, which is submitted through the District. The Integration Grant process includes the development, implementation, and monitoring of plans that incorporate baseline data, improvement goals, action steps, and progress measures in alignment with ODE requirements. These plans and associated data are maintained and reported through the Integration Grant framework and are accessible through that process. Through the Integration Grant agreement and submission, the District has access to all relevant data and reporting related to Logos' school improvement efforts. Logos uses this process to guide decision-making and improve student outcomes, and progress is reviewed annually as part of the District's annual review of the school.

b. The audit and financial statements required under Section 6 paragraph C of this contract, including proof of insurance;

- (ii) District board and staff members may visit the Logos charter site at any time during operating hours. Pursuant to state law (currently ORS 338.095), the District or its designee will, at least annually, visit the Logos site and review Logos' compliance with the terms and provisions of this charter.

J. Term

The terms of this contract will become effective on July 1, ~~2021~~2026, assuming all conditions precedent enumerated in Section 2 of this contract have been met, and will last for a period of ~~five (5)~~ten (10) school years until June 30, ~~2026~~2036, subject to the provisions of Section 8.K, below. The term of this Charter Agreement shall be ten (10) years from the effective date of approval. Beginning in year five (5) of the agreement and continuing through year ten (10), either party may request to reopen negotiations regarding the terms of this Charter Agreement. To initiate such negotiations, the requesting party must provide written notice to the other party by email no later than December 1 of the applicable year. Upon receipt of such notice, the parties agree to begin the standard charter renewal process. Unless otherwise agreed in writing by both parties, all existing terms of this Charter Agreement shall remain in effect during the charter renewal process.

K. Termination

- (i) To the extent allowed by ORS Chapter 338 the District may revoke the charter and terminate this contract on any of the following grounds:
 - (a) Violation of or failure to meet and sustain any terms of this contract or ORS Chapter 338.
 - (b) Failure to meet the requirements for student performance stated in Section 5 of this contract.
 - (c) Failure to correct any violation of a federal or state law that is described in ORS 338.115.
 - (d) Failure to maintain insurance as described in Section 10 of this contract.
 - (e) Failure to maintain financial stability.

- (f) Failure to maintain, for two or more consecutive years, a sound financial management system.
- (ii) The District shall provide sixty (60) days prior written notice of its intent to terminate the charter agreement. Logos may appeal the District's decision to terminate the charter agreement directly to the District's Board and request a hearing prior to the expiration of the 60-day notice period. Logos may respond to the allegations in the District's written notification by offering documentary evidence and oral argument. The District bears the burden of proving the allegations in the written notification by a preponderance of the evidence. Logos has the burden of proof for any affirmative defense to the allegations by a preponderance of the evidence. The District Board's decision may only be appealed to the State Board of Education according to ORS 338.105. Until the effective date of termination of this contract, as determined by the District, the District shall continue to make the funding payments under Section 6 of this contract to Logos.
- (iii) Logos shall only terminate this charter at the end of a semester. Logos shall notify the District in writing at least one hundred eighty (180) calendar days prior to the proposed effective date of termination, dissolution or closure of Logos.
- (iv) Notwithstanding anything to the contrary in Sections 8.K(i)-(iii), above, the District may terminate the charter immediately and close the school if Logos is endangering the health or safety of the students enrolled at Logos.
- (v) In the event of termination of Logos as a public charter school, all assets purchased with public funds given to Logos by the District in accordance with this contract shall be given to the State Board of Education in accordance with ORS 338.105(6). Logos is entitled to any asset that was purchased with non-public funds, or was purchased with public funds if less than \$500.00 of public funds were expended on the asset, at the time Logos ceases to operate as a public charter school, and to any other asset that Logos has acquired through the expenditure of non-public funds as described in Section 8, paragraph M of this contract.
- (vi) In the event of termination of Logos as a public charter school, Logos will aid families with paperwork and information so they may have as smooth of a transition as possible to another school of their choice or to register with the Southern Oregon Education Services District to return to homeschooling. Logos or MSD may conduct exit interviews with staff, parents, board, or administration to facilitate the transition

for families.

- (vii) As provided in ORS 338.105(6), upon termination of this contract for any reason or upon the dissolution of Logos, all student education records of Logos shall be delivered to the administrative office of the District.

L. Dissolution

In the event Logos should cease operations as a public charter school for whatever reasons, including but not limited to, the non-renewal or revocation of its charter, or dissolution of the nonprofit corporation, it is agreed that Logos' legal authority to operate as a private or non-chartered public school shall not be abridged. However the assets of Logos that were purchased with public funds given to Logos by the District under this contract, or by any other public entity, shall be distributed in the same manner as described in Section 8, paragraph K of this contract.

M. Property Inventory Control

- (i) Logos shall maintain records of purchase orders for all assets over \$500.00. These records shall indicate whether the assets were purchased with public funds, or non-public funds. Logos shall provide the District with a copy of this purchase order record no later than July 15 of each year that Logos operates as a public charter school in the District. For purposes of this section public funds shall include any and all funds distributed to Logos:
 - (a) By the District, pursuant to ORS 338.155 and ORS 338.165;
 - (b) By the Oregon Department of Education, including any and all federal grants for which Logos may apply and;
 - (c) By any agency, division or branch of the United States Government, or any entity created by an agency, division or branch of the United States Government.
- (ii) Any asset which was purchased by Logos with public funds in excess of \$500.00 shall be given to the State Board of Education upon termination pursuant to ORS 338.105(6). Logos may retain any asset which was purchased with non-public funds upon termination. If Logos does not maintain records of purchase orders for all assets, or cannot provide records showing that an asset was purchased with non-public funds, then it shall be assumed that the asset was purchased with public funds, and upon termination the asset in

question shall be given to the State Board of Education pursuant to ORS 338.105(6).

- (iii) The parties acknowledge that assets costing less than \$500.00 may have little value at the time of any termination of this contract. Therefore, Logos will not be held responsible for identifying assets costing less than \$500.00 and purchased with public funds, but the District does not waive any rights that the State Board of Education may have to enforce ORS 338.105(6).

9. Employment Matters

Logos shall be the employer of all employees of Logos. Employees of Logos shall not be considered, for any purpose, employees of the District. Employees of Logos shall not be entitled to, or be covered by, any collective bargaining agreement that the District has entered into with any of its respective employees or their exclusive representative for purposes of collective bargaining.

A. Criminal Background checks, Sexual Conduct Clearance, and Pre-employment Drug Screen.

- (i) Logos shall comply with ORS 181A.539, 195, 326.603, 326.607, ~~339.370~~, and 342.232 relating to criminal records checks. Logos shall not knowingly employ an individual for whom a criminal background investigation has not been initiated or who has been convicted of an offense that would preclude that individual from working in a public school in Oregon.
- (ii) Logos shall comply with ORS 339.374 relating to **child abuse and sexual conduct clearance**.
- (iii) Logos shall not employ an individual who has not successfully completed a pre-employment drug screen.
- (iv) No later than ten (10) business days prior to the start of each school each year, Logos shall provide to the District a list containing the following employee information:
 - 1. Employee names and job positions
 - 2. Proof of valid Oregon teaching license/Charter School Registry with an endorsement appropriate to their position.
 - 3. Date of criminal background investigation results.
 - 4. Date of drug screen results

5. Date of **child abuse and** sexual conduct mailing and receipt of information.

6. Evidence of Highly Qualified status

B. Teacher and Administrator Licensure/Registration Requirements.

- (i) Pursuant to ORS 338.135(7), at least one-half of the total full-time equivalent (FTE) teaching and administrative staff at Logos shall be licensed by TSPC pursuant to ORS 342.135, 342.136, 342.138 or 342.140. Any teaching or administrative staff not licensed by the Oregon Teacher Standards and Practices Commission (TSPC) will register with TSPC in accordance with ORS 338.135(7)(a)-(c) and OAR 584-023-0005 prior to beginning work.
- (ii) ~~All individuals employed by Logos who are licensed or registered with TSPC shall also comply with OAR 548-100-0091 or 584-100-0096, whichever is applicable.~~
- (iii) All licensed and registered elementary and secondary teachers must hold a bachelor's degree and must meet the highly qualified teacher definition. Each educator must demonstrate subject matter competency based on TSPC and state requirements ~~OAR 584-100-0016 and OAR 584-100-0038.~~
- (iv) No Logos licensed and administrative staff may serve students until the verification of their highly qualified status has been submitted to the District and approved.

C. Logos Responsibilities

- (i) Logos shall have a licensed/negotiated building level administrator or his/her designee on-site.
- (ii) The administrator for Logos shall not be assigned to multiple charter schools, but shall be the administrator solely for Logos.
- (iii) Logos will make final decisions regarding hiring (other than for services contracted with District for, such as ELL/SPED), compensation, evaluation, promotion, discipline, and termination of employees working at Logos. Logos will be responsible for the supervision and evaluation of the teaching staff within Logos. These services may be a contracted service.
- (iv) Employees shall be paid through the payroll department of Logos.
- (v) Employees of Logos will receive benefits in compliance with their

respective agreements.

- (vi) Logos shall comply with all applicable federal and state laws concerning employee welfare, safety, and health issues.
- (vii) Logos shall be responsible for establishing and maintaining personnel records for employees working at Logos in compliance with all applicable federal and state laws concerning the maintenance, retention and disclosure of employee records.
- (viii) Logos shall ensure that its own employees comply with all applicable federal and state law relating to employee conduct as stated in the staff Handbook. Logos board of directors reserves the right to establish additional standards for conduct as they see fit.
- (ix) Professional development will be at the discretion of Logos.

10. Insurance and Legal Liabilities

A. Insurance

- (i) Logos shall, at its own expense, secure, retain, and provide proof of insurance consistent with the amounts set forth in Medford School District policy LBE and LBE-AR as of the time this contract is executed, or as may be revised during the term of this contract: commercial and general liability insurance; errors and omissions insurance; directors' and officers' liability insurance; automobile liability insurance; workers' compensation insurance; and property insurance.
- (ii) No later than August of each year, and at any time thereafter upon request of the District, Logos shall provide the District with certificates of insurance or other satisfactory proof evidencing coverage in the types and amounts set forth herein. All such insurance policies shall contain a provision requiring notice to the District, at least 30 days in advance, of any material change, non-renewal or termination to the attention of the Superintendent of the District.

B. Legal Liabilities

- (i) Pursuant to ORS 338.115, in addition to any statute or rule that is listed in this charter, the following federal and state laws apply to Logos and shall be observed by Logos where applicable:
 - (a) Federal law.

- (b) ORS 192.311~~410~~ to 192.505~~478~~ (Public Records Law).
- (c) ORS 192.610 to 192.705~~690~~ (Public Meetings Law).
- (d) ORS 297.405 to 297.555 and 297.990 (Municipal Financial Audit Law).
- (e) ORS 326.565~~561~~, 326.575~~565~~, and 326.580~~575~~ (student records).
- (f) ORS 181A.534~~195~~, 326.603, 326.607, and 342.223~~and 342.232~~ (criminal records checks).
- (g) ORS 337.150 (textbooks).
- (h) ORS 339.141, 339.147 and 339.155 (tuition and fees).
- (i) ORS 332.505(2), 659.850, 659.855 and 659.860 (discrimination).
- (j) ORS 30.260 to 30.300 (tort claims).
- (k) Health and safety statutes and rules.
- (l) The statewide assessment system developed by the Oregon Department of Education under ORS 329.485(2).
- (m) ORS 329.045 (academic content areas).
- (n) ORS 329.451 (high school diploma, modified diploma, extended diploma and ~~alternative~~ certificate of attendance).
- (o) Any statute or rule that establishes requirements for instructional time provided by a school each day or during a year.
- (p) ORS 339.250 (942) (prohibition on infliction of corporal punishment).
- (q) ORS 339.326 (notice concerning students subject to to juvenile court petitions).
- (r) ORS 339.119 (consideration for educational services).
- (s) ORS Chapter 338.

- (t) ORS Chapter 657 (Employment Department Law).
 - (u) Any administrative rule adopted by the Oregon state Board of Education or the Oregon Teacher Standards and Practices Commission (TSPC) regarding public charter schools.
 - (v) ORS 339.370 ~~to, 339.372, 339.388 and~~ 339.400 (reporting of ~~sexual conduct and~~ child abuse and training on prevention and identification of ~~sexual conduct and~~ child abuse).
 - (w) ORS 279A, 279B and 279C (public contracting).
 - (x) ORS 329.546 (physical education).
 - (y) ORS 336.840 (use of personal electronic devices).
 - (z) ORS 342.856 (core teaching standards).
 - (aa) Statutes and rules that expressly apply to public charter schools.
 - (bb) Statutes and rules that apply to a special government body, as defined in ORS 174.117, or a public body, as defined in ORS 174.109.
- (ii) Logos will publish its policies on its website at <https://logoscharter.com/adopted-school-board-policies/>

C. Waiver

Logos may apply to the State Board of Education for a waiver consistent with ORS 338.025. Logos shall notify the District in writing at least thirty (30) days prior to requesting a waiver and invite district comment on the waiver request. The written notification shall state the waiver being sought, the reasons for the waiver and how the waiver will enhance the educational program at Logos.

D. Full Faith and Credit

Logos agrees that it shall not extend the full faith and credit of the District to any third person or entity. Logos acknowledges and agrees that it has no authority to enter into a contract that would bind the District. Logos' governing Board has the authority to approve contracts to which Logos is a party, subject to the requirements and limitations of the Oregon

Constitution, state law and provisions of this contract.

E. Indemnification

- (i) To the extent not covered by insurance or otherwise barred by the Oregon Tort Claims Act in ORS Chapter 30, Logos agrees to defend, indemnify and hold the District, its Board, agents and employees harmless from any and all liability, claims, and demands on account of injury, loss or damage, including, without limitation, claims arising from (1) the possession, occupancy or use by Logos of property of Logos or its landlord, its faculty, employees, students, patrons, guests or agents; (2) civil rights violations, bodily injury, personal injury, sickness, disease, death, property loss or damage or any other losses of any kind whatsoever which arise out of the acts or omissions of Logos. This indemnification shall not apply to any liability, claims, or demands resulting solely from the wrongful act or omission of any District Board member, officer or employee. This indemnification shall also not apply to any damages incurred regarding any act or omission of Logos or Logos' Board that is later deemed to be required by law or this contract. Logos agrees to indemnify, hold harmless and defend the District from all contract claims in which Logos has obligated the District without the District's prior written approval. The foregoing provision shall not be deemed a relinquishment or waiver of any kind of applicable limitations of liability provided in the Oregon Tort Claims Act.
- (ii) To the extent not covered by insurance or otherwise barred by the Oregon Tort Claims Act in ORS Chapter 30, the District agrees to defend, indemnify and hold Logos, its Board, agents and employees harmless from all liability, claims, or demands on account of injury, loss or damage, including, without limitation, claims arising from civil rights violations, bodily injury, personal injury, sickness, disease, death, property loss or damage or any other losses of any kind whatsoever which arise out of the administration of this contract or are in any manner connected with the District's operation. This indemnification shall not apply to any liability, claims, or demands resulting from the negligence or wrongful act or omission of any Logos Board member, officer or employee. This indemnification shall not apply to any liability, claims, or demands resulting from the negligence or wrongful act of any District employee working at Logos whose negligent or wrongful act or omission is caused in whole or in part, or directed by Logos. This indemnification shall not apply to any damages incurred regarding any act or omission of the District or District Board that is later determined to be required by law or this contract. The foregoing provision shall not be deemed a relinquishment or waiver of any kind of applicable limitations of

liability provided in the Oregon Tort Claims Act.

- (iii) This indemnification, defense and hold harmless obligation on behalf of Logos and the District shall survive the termination of this contract. Any indemnified party shall have the right, at its own expense, to participate in the defense of any suit, without relieving the indemnifying party of any of its obligations hereunder.

F. District Disclaimer of Liability

The parties to this contract expressly acknowledge that Logos is not operating as an agent, or under the direction and control, of the District Board except as required by law or this contract, and that the District Board assumes no liability for any loss or injury resulting from

- (i) the acts or omissions of Logos, its governing Board, trustees, agents or employees;
- (ii) the use and occupancy of any building occupied by Logos or any matter in connection with the condition of such building; or
- (iii) any debt or contractual obligation incurred by Logos.

G. ADA/§504 Obligations

Logos acknowledges that it is legally responsible to comply with Section 504 of the Rehabilitation Act of 1973, the Americans with Disabilities Act of 1990 and ORS Chapter 659 with respect to its students, staff and patrons. Logos shall indemnify and hold harmless the District from all claims under these statutes.

H. Transportation

In accordance with ORS 338.145, Logos shall be responsible for providing transportation to students who reside within the school district and who attend Logos.

Logos students may obtain transportation through the student's parent/guardian, public transportation or existing public school bus lines. The District shall not be obligated to alter existing bus routes or add bus routes for purposes of providing transportation to Logos' students. Subject to availability of space, a District bus may stop at Logos' facility to drop-off and pick-up Logos students, if Logos' facility is on a designated District bus route. The District will provide transportation to Logos students along existing public school bus lines within the District, if space is available.

11. Renewal of Contract

As provided in ORS 338.065, any renewal of this contract shall follow the process set forth in this section.

- A. No earlier than 210 days prior to the expiration of the term of this charter, and no later than 180 days before the expiration of the term of this charter, Logos may request, in writing, that this contract be renewed. Logos' written request shall indicate which terms, if any, Logos would propose to change from the current contract. Logos shall also state why it believes the current terms need to be changed in a new contract.
- B. Within fifteen (15) days of receiving the written request from Logos, the District shall indicate in writing what additional information, if any, it will need to make its decision to renew the contract. The District shall also indicate whether the proposed changes suggested by Logos are acceptable to the District.
- C. Within fifteen (15) days of receiving the District request for additional information Logos shall provide the requested additional information to the District.
- D. Within 45 days after receiving a written renewal request from Logos, the District shall hold a public hearing regarding the request for renewal.
- E. Within 10 days after the public hearing, the District shall notify Logos of the District's intent about the renewal of the charter.
- F. Within twenty (20) days after the public hearing, the District shall approve the renewal of the charter or state in writing the reasons for denying the renewal of the charter. The District will base the charter renewal decision on a good faith evaluation of whether Logos is: (a) in compliance with ORS Chapter 338 and all other applicable state and federal laws; (b) in compliance with the terms of this contract; (c) meeting or working toward meeting the student performance goals and agreements specified in Section 4-5 of this contract and in any of the attachments incorporated herein; (d) fiscally stable and has used a sound financial management system, as well as an absence of audit findings of material misstatements in the audit report; and (e) otherwise in compliance with any renewal criteria set forth herein. The District shall base its renewal evaluation primarily on a review of Logos' annual performance reports, annual audit of accounts and annual site visit and review, as well as any other information mutually agreed upon by the boards of Logos and the District.
- G. If the District determines that it will renew the contract, the two parties shall meet and negotiate a contract. It shall be the goal of the two parties to

complete negotiation of the contract within ninety (90) days of the date the District provides notice to Logos that it will renew the contract. If it is not practically possible to complete the negotiation within ninety (90) days, the parties shall work in good faith, with all due diligence, to complete negotiation of the contract as quickly as possible.

H. The District may make the renewal of this contract conditional upon the following factor(s):

- (i) Logos remaining in compliance with all provisions of this contract for the remainder of the school year;
- (ii) Logos remaining in compliance with all federal law governing public charter schools for the remainder of the school year;
- (i) Logos remaining in compliance with all state law governing public charter schools for the remainder of the school year

I. If the District determines that it will not renew the contract, then Logos' board may address the reasons stated by the District and any remedial measures suggested by the District and submit a revised request for contract renewal to the District. A revised request must be submitted within fifteen (15) days of the notice of contract non-renewal. The District will then reconsider the renewal request and notify Logos of its decision within fifteen (15) days of receiving the revised request.

J. If the District determines that it will not renew the contract, then Logos shall cease to be a charter school sponsored by the District on June 30, 2026; however, Logos shall retain its right to challenge and appeal the District's nonrenewal in accordance with ORS 338.065(6).

K. Pursuant to ORS 338.065(5)(h), upon mutual consent at any time during the renewal process, the District and Logos may agree to a renewal process timeline other than that outlined in this Section 11.

12. Miscellaneous Provisions

A. Entire Agreement

This contract, including the Exhibits and other documents incorporated by reference herein, contains all terms, conditions and provisions hereof and the entire understanding and all representations of understandings and discussions of the parties relating thereto, and all prior representations, understandings and discussions are merged herein and superseded and canceled by this contract.

B. Governing Law

This contract shall be governed by, subject to, and construed under the laws of the State of Oregon without regard to its conflict of law provisions. The parties intend that where this contract references federal or state law, if the law changes or new laws, rules, regulations or statutes are enacted that may affect any of the terms of this contract, the parties shall review the affected terms of this contract and conform it accordingly.

C. Assignment

Logos shall not, under any circumstances, assign, delegate, or contract with any entity to provide the educational program described in this contract. It is expressly understood that the charter granted by this contract to operate the educational program runs solely and exclusively to Logos.

D. Terms and Conditions of Application

The parties to this contract agree that the application for a charter submitted by Logos, the terms of which are incorporated by reference except as amended by any specific terms of this contract, sets forth the overall goals, standards and general operational policies of Logos.

(As of the July 1, 2016 contract, Logos and the District combined the relevant aspects of the original application into the contract. Any part of the application not added to this contract is no longer required.)

E. Conflict between Application and Contract

The parties agree and acknowledge that should there be a conflict between any provision of this contract and the application submitted to the District by Logos, the contract provision(s) shall supersede any provision contained in the application.

(As of the July 1, 2016 contract, Logos and the District combined the relevant aspects of the original application into the contract. Any part of the application not added to this contract is no longer required.)

F. District Liaison

The District shall designate, for purposes of this contract, the District Superintendent, or his/her designee, as the official District liaison between the District and Logos.

G. Amendment

This contract may be modified or amended only by written agreement between Logos and the District. The parties agree to modify or amend this contract in order to conform to any new and/or changed laws applicable to charter schools.

H. Notice

Any notice required, or permitted, under this contract, shall be in writing and shall be effective upon personal delivery (subject to verification of service or acknowledgment of receipt) or three (3) business days after mailing when sent by certified mail, postage prepaid, to the party indicated in Section 12 J of this document.

I. Definition of Business Day

For purpose of this contract, "business day" means a day in which the District administrative offices are open. "Business day" does not include Saturdays, Sundays, official state holidays listed in ORS 336.010, federal holidays, any day(s) in which the administrative office is closed due to inclement weather or any day that the District administrative office is closed due to action taken by, or ordered to be closed by, the District Board of Directors or their designee, any instrumentality of the City of Medford, any instrumentality of Jackson County, the State of Oregon or federal government.

J. Address of Parties for Purpose of Written Notice

The following addresses are the addresses to be used when sending a written notice required by law or this contract:

Medford School District
Attn. Superintendent ~~Dr. Bret Champion~~ Jeanne Grazioli
815 S. Oakdale
Medford, Oregon 97501



Logos
Attn: Administrator Sheryl Zimmerer
1203 N. Ross Lane
Medford, Oregon 97501

Should these addresses change; the parties agree to notify the other party within ten (10) calendar days of the address changing.



K. No Waiver

The parties agree that no assent, expressed or implied, to any breach by either of them of any one or more of the covenants and agreements expressed herein shall be deemed or to be taken to constitute a waiver of any succeeding or other breach.

L. Dispute Resolution

The intent of this dispute resolution process is to (1) resolve disputes within the school pursuant to the school's policies, (2) minimize the oversight burden on the District, (3) ensure a fair and timely resolution to disputes, and (4) frame a charter oversight and renewal process and timeline so as to avoid disputes regarding oversight and renewal matters.

The District and Logos agree to work together to accomplish all tasks necessary to fully implement this charter, including the submission of any necessary and duly-prepared waiver requests to the State Board of Education.

Dispute Resolution Process: The staff, the Governing Board of Logos, and the District School Board agree to attempt to resolve all disputes regarding this Charter or other issues which may arise regarding Logos pursuant to the terms of this section in a timely, good-faith fashion. Both shall refrain from public commentary regarding any disputes until the matter has progressed through the dispute process.

In the event that Logos and the District have disputes regarding the terms of this charter or any other issue regarding the relationship between Logos and the District, both parties agree to first frame the issue in written form and provide it to the other party as indicated in 12 J of this document. The ~~Chairman~~ of the Governing Board of Logos and the Superintendent of the District agree to meet informally and attempt to resolve the dispute. If this joint meeting fails to resolve the dispute, both parties agree to jointly identify a neutral, third party mediator. The format of the mediation session shall be developed jointly by the superintendent and the chair and shall incorporate informal rules of evidence and procedure unless both parties agree otherwise. The findings or recommendations of the mediator shall be non-binding, unless the governing boards of Logos and the District jointly agree to bind themselves. Logos may appeal to the State Board of Education concerning those matters within its jurisdiction under ORS Chapter 338.

Disputes arising from within Logos, including all disputes among and between students, staff, parents, volunteers, advisors, partner organizations and the Governing Board of Logos, shall be resolved pursuant to policies and processes developed by Logos.

The District shall not intervene in any such internal disputes without the consent of the Board of Directors of Logos and shall refer any complaints or reports regarding such disputes to the Logos Board for resolution. The District agrees not to intervene or become involved in the dispute unless the dispute has given the District reasonable cause to believe that a violation of this charter or related laws or agreements has occurred, or unless the Governing Board of Logos has requested the District to intervene in the dispute.

M. Severability

If any provision of this contract is determined to be unenforceable or invalid for any reason, the remainder of this contract shall remain in effect, unless otherwise terminated by one or both of the parties in accordance with the terms of this contract.

N. Delegation

The parties agree and acknowledge that with regard to this charter agreement between the District and Logos, the functions and powers of the District Board may be exercised by the District Liaison, provided that any ultimate decision regarding renewal, non-renewal or revocation of this contract be made only by the District Board.

O. Prior Actions

It is expressly agreed and understood that as a condition precedent to this contract becoming effective on the effective date specified above in Section 2, Logos shall have taken, completed and satisfied on or before the date specified herein, any action or obligation which is required to be completed before such effective date, and failure to do so shall constitute grounds for the District to declare this contract null and void.

P. Attorney Fees

If any suit, action or arbitration is commenced or instituted to interpret or enforce the terms of this contract, to exercise any remedy on account of a default, or otherwise relating to the provisions of this contract, the prevailing party or non-defaulting party shall be entitled to recover from the losing or defaulting party its reasonable attorney fees and costs, in addition to all other sums provided by law, at trials or arbitration. Such sums shall be

determined by the court or arbitrator.

Q. Exhibits

Exhibits A, B, C, D, E, F, G, H, and I are hereby incorporated by reference as if the same were fully set forth herein.

R. Logos Authority to Enter Into Contract

Logos expressly affirms that the signatories on its behalf who sign below have the authority to enter into this contract on behalf of Logos and that the Board of Directors of Logos has duly approved this contract. Logos' Board shall provide a copy of its written resolution authorizing Logos to enter into this contract to the District.

IN WITNESS WHEREOF, the parties have executed this contract effective as of the date first set forth above.

MEDFORD SCHOOL DISTRICT

LOGOS CHARTER SCHOOL

Chair,
Medford School District Board of Directors

Chair,
Logos Charter School Board of Directors

Date: _____

Date: _____

~~ADDENDUM:~~

~~1 – 2021-2026~~ADDENDUM:

2026-2036 OSBA MOU Between Logos and Medford School District

EXHIBITS:

- ~~A --- Logos Renewal Request~~
- ~~B --- District Response to Renewal~~
- ~~C --- District Office Recommendation~~
- ~~D --- District Board Minutes~~
- ~~E --- Logos Mission, Vision, and Purpose~~
- ~~F --- Logos Philosophy~~

- ~~A. G --- Logos Renewal Request~~
- B. District Response to Renewal
- C. District Office Recommendation
- D. District Board Minutes
- E. Logos Response to More Information on Funding Request
- F. Logos Mission, Vision, and Purpose
- G. Logos Philosophy
- H. Logos Articles of Incorporation
- I. ~~H --- Medford Charter Subcommittee on Charter Requests~~
- J. ~~Technology Matrix~~

Memorandum of Understanding OSBA - Logos - Medford

MEMORANDUM OF UNDERSTANDING BETWEEN Medford School District AND Logos Public Charter School REGARDING SERVICES PROVIDED BY THE OREGON SCHOOL BOARDS ASSOCIATION

This Memorandum of Understanding ("MOU") is between Medford School District and Logos Public Charter School, collectively referred to as "Parties." This Agreement is effective upon signature by the Parties and shall remain in effect for the duration of the current charter contract between the Parties, unless terminated as allowed in this Agreement.

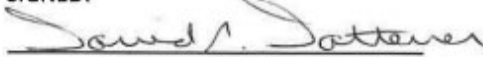
RECITALS:

1. The Oregon School Boards Association ("OSBA") was incorporated as a nonprofit corporation under ORS Chapter 65 on July 1, 2018. As a result, OSBA will be prohibited from accepting dues and service fees from entities that are not political subdivisions of the state as defined under Treas Reg § 1.103-1(b) and Revenue Ruling 78-276, 1978-2 CB 256. Under these definitions, Oregon charter schools are not political subdivisions of the state.
2. Therefore, OSBA cannot offer associate memberships to charter schools or contract directly with them for services.
3. Charter schools can still access OSBA services through their sponsor, as long as the sponsor is a member of OSBA

AGREEMENT:

1. Medford School District permits Logos Public Charter School to access services through OSBA for the length of the charter contract (July 1, 2026-2036). Logos Public Charter School shall provide a fully executed copy of this MOU to OSBA.
2. When Logos Public Charter School schedules a service with OSBA, OSBA will enter into a service agreement with Medford School District and will invoice Medford School District for the service, according to the MOU.
3. Medford School District will pay the OSBA invoice, and will invoice Logos Public Charter School for the same amount.
4. Logos Public Charter School shall remit payment to Medford School District in full within thirty (30) days of the invoice.
5. Logos Public Charter School's failure to remit payment to the Medford School District in a timely manner may result in the termination of this Agreement at the discretion of Medford School District. 6. This Agreement may be terminated or amended only by written approval of both parties, except as authorized in 5 above.

SIGNED:


Logos Public Charter School Board Chair

Date: 4/13/26


Medford School District Board Chair

Date: 4/23/26

Exhibit A
Logos Renewal Request



December 8, 2025

Medford School Board
Medford School District 549C
815 South Oakdale Avenue
Medford, OR 97501

Dear Members of the Medford School Board,

On behalf of Logos Public Charter School, I want to extend our sincere appreciation for the strong partnership we have shared with the Medford School District over the years. Together, we have built a collaborative relationship grounded in mutual respect, shared goals, and a steadfast commitment to serving the students and families of our community.

Logos has continued to thrive, growing in both quality and innovation while maintaining the continued academic and social-emotional growth of our students. Here are a few of the many successes of Logos over the last few years.

Academic Excellence

- Consistently among the highest graduation rates in Southern Oregon (97%+ in recent years). Last year our graduation rate was 98.73%
- Thousands of college credits earned annually through Rogue Community College and Southern Oregon University partnerships.
- Multiple students graduating with Associate Degrees as well as earning their high school diploma. Last year we had 13 students earn 18 Associate Degrees and 24 students earn technical certificates.
- Recognized by Cognia as Oregon's only School of Distinction for excellence in learning impact, leadership, and innovation.
- Recipient of the Building Hope Innovation Award for forward-thinking school design and community impact.
- Both our State of Jefferson middle school and high school have won SOU's State of Jefferson Scavenger Hunt, an academic competition, several times over the last several years. The high school has won the last 6 years in a row.
- Our Environmental Sciences Envirothon has won the Oregon Envirothon competition every year for the last 4 years and went on to compete internationally, earning 16th place last year across the US and international teams.

Student Opportunities and Enrichment

- Robust extracurricular offerings including Brain Bowl, Envirothon, OBOB, Clay Target Shooting, Track & Field, Cross Country, and Performing Arts.



- Active musical theater program with recent productions such as Peter Pan, High School Musical, and Hercules.
- Partnerships with local businesses and organizations for career-technical and community-based learning (e.g., welding, esthetics, phlebotomy, and nursing).
- Emphasis on personalized learning plans tailored to each student's academic and life goals.

Staff Excellence and Culture

- Named one of Oregon's 100 Best Nonprofits to Work For multiple years.
- Deep commitment to professional development, including Skyrocket coaching, Writing Revolution training, and data-driven instructional practices.
- Highly collaborative leadership team with a focus on communication, camaraderie, and continuous improvement.

Community Partnership and Leadership

- Over seven years of successful collaboration with the Medford School District administration and board.
- Regular contributor to statewide charter advocacy, including testimony and leadership in ORC3S.
- Deep partnerships with local organizations such as People's Bank, Adroit Construction, Marquess Engineering, CEC Engineering, and the Wes Howard Foundation.
- A model of fiscal transparency, compliance, and community trust among Oregon charter schools.

As we look ahead, Logos is seeking renewal of our charter for a **10-year term**. We are proud of the trust and collaboration that make such a long-term commitment possible and believe it will provide continued stability and focus for students, families, and staff alike.

In addition, we respectfully request the following adjustments as part of our renewal agreement:

- **Increase the student enrollment cap to 1,500 students from 1310**, reflecting both ongoing community demand and our proven capacity to serve students effectively. This is only 190 over 10 years. Doing this modest increase over 10 years shows our commitment to slow and purposeful growth.
- **Adjust the pass-through rate from the current 80% to 90%**, phased in at **1% increments per year** over the 10-year term. In the past the Medford School District administration has agreed that the pass through should be changed to 90% but has yet to make that change. This gradual adjustment would allow Logos to sustain high-quality programs, staff development, and student supports while continuing to align with best practices statewide.



We are proud to be part of the Medford School District family and deeply value the spirit of collaboration that has defined our relationship for so many years. We look forward to continued partnership, shared success, and open dialogue as we move through the renewal process.

Thank you for your ongoing leadership and dedication to the students of Medford.

Warm regards,

A handwritten signature in black ink, which appears to read 'David A. Dotterer'. The signature is fluid and cursive, written over a light blue horizontal line.

Colonel David Dotterer
Chairman of the Board
Logos Public Charter School

Exhibit B
District Response to Renewal



Todd Bloomquist, Senior Executive Director
Teaching and Learning
680 Biddle Road, Medford OR 97504
todd.bloomquist@medford.k12.or.us
ph 541-842-3626

January 8, 2026

To: Sheryl Zimmerer and David Dotterrer, Logos

From: Todd Bloomquist

Re: Response to Logos Letter of Intent to Renew

Dear Ms. Zimmerer and Colonel Dotterrer:

Thank you for your letter of intent to renew the charter contract for Logos Charter School. It is very exciting the good work your school is doing and the service it is providing to the community. I appreciate your highlights of accomplishments.

I have included a summary and initial response to each of the requests for changes below:

Logos requests to increase the enrollment cap from 1310 to 1500 students. This request will require further discussion with our Board and team.

Logos requests that passthrough dollars be increased from 80% to 90% in 1% incremental increases each year for 10 years. This request will require further discussions with our Board and team about the increased passthrough dollars to Logos.

I will be gathering the initial questions from the MSD Team and will provide them to you as soon as possible. We are also working on scheduling a time with you and Dave to meet with the MSD team, and I am happy to have follow up discussions as needed.

We value our partnership with Logos, and look forward to working with you and your board through this process.

Sincerely,

A handwritten signature in blue ink that reads "Todd P. Bloomquist".

Todd P. Bloomquist, EdD



Exhibit C
District Office Recommendation



EXECUTIVE SUMMARY

Meeting Date:	February 19, 2026
Agenda Item:	Approval of Logos Public Charter Renewal Request
Item Type:	Action Item
Administrator:	Todd Bloomquist
Objective:	Approval of the Charter Contract Renewal Request

Background:

The Logos Public Charter School requested the District renew their charter contract on December 10, 2025. A copy of the letter is included in the Board packet.

The District responded on January 8, 2026 and notified Logos that some of the requests will require further discussion.

Both the public hearing and the recommendation for approval will be presented to the Board on February 19, 2026. Once approved to move forward with renewal, the two parties will meet, negotiate, and come to an agreement on the terms of the new charter. The full timeline for renewal can be referenced [here](#), in accordance with [OAR 581-026-0400](#).

An annual visit with Board members was conducted on January 30, 2026. A summary of the visit is included in the Board packet.

Additional Materials:

[Logos Request to Renew Charter](#)
[MSD Response Letter to Logos](#)
[Logos Annual Visit Summary](#)

Recommendation:

After reviewing Logos Charter School's annual report, student performance data, financial records, and visiting the site, we recommend that the Board approve the Logos Charter School contract renewal request and move forward with negotiating the terms of a new contract.

Suggested Motion:

"I move that the Medford School District approve the Logos Public Charter contract renewal request, and move forward with negotiating the terms of a new contract."

Exhibit D **District Board Minutes**



Regular Meeting of the Board of Education

Thursday, February 19, 2026 6:00 PM

Oakdale Middle School Room 230
815 S. Oakdale Ave.
Medford, OR 97501

Board members present: Lilia Caballero (attended virtually), Kendell Ferguson, Erik Johnsen, Sandra LaNier McHenry (attended virtually), Sunny Spicer, Michael Williams, and Angela Zbikowski

A video recording of the Board meeting can be found on the district website at [this link](#). The slide presentation can be viewed by clicking on Extras listed next to the meeting at [this link](#).

1. Call to Order / Pledge of Allegiance / Roll Call

Board Chair Kendell Ferguson called the meeting to order at 6:04 PM, led the Pledge of Allegiance, and confirmed a quorum through roll call. She welcomed attendees and read the district's vision statement.

2. Agenda Adjustments and Approval

No objections were raised. The agenda was approved by unanimous consent.

3. Board Announcement

Chair Kendell Ferguson referenced the superintendent search process that began in October with the hiring of a search firm and culminated in finalist interviews conducted by the Board and stakeholder panels. She announced that the Board has extended an offer to Interim Superintendent Jeanne Grazioli for the permanent superintendent position, and that she has accepted. The Board has entered into contract negotiations with Grazioli and anticipates bringing a proposed contract forward for approval at an upcoming meeting.

Board Directors noted that the process, facilitated by McPherson & Jacobson, was thorough and equitable. They expressed confidence that the firm's guidance supported the Board in narrowing the candidate pool and selecting the right individual to lead the district.

Grazioli shared her gratitude for the opportunity, describing the process as rigorous and her service as Interim Superintendent as meaningful work. She expressed enthusiasm for the next chapter and her commitment to continuing to move the district forward.

Those in attendance extended congratulations.

4. Public Hearing for Logos Public Charter School & The Valley School of Southern Oregon

Chair Ferguson opened the public hearing. The following citizens came forward in support of renewing the Logos Public Charter School contract: Sheryl Zimmerer, Dave Dotterer, Layla Copeland, and Patrick Rochon.

The following citizens came forward in support of renewing The Valley School of Southern Oregon contract: Tamara Johnston, Kris Von Wald and Craig Manning.

5. Close Public Hearing

The public hearing was closed at 6:25 PM.

6. Public Hearing for Exemption from Competitive Bidding Requirements and Use of the Design/Build Contractor Method of Procurement for the Oakdale Middle School and Wilson Elementary School Trusses Project

Chair Ferguson opened the public hearing. There were no requests to speak.

7. Close Public Hearing

The public hearing was closed at 6:26 PM.

8. Items for Information & Discussion

8.a. Interim Superintendent Report: Graduation Rate

Interim Superintendent Jeanne Grazioli directed the Board's attention to the graduation reports included in the packet and reviewed key data highlights. She noted that the district's 2025 graduation rate increased from 85.3% to 88.1%.

Grazioli attributed the improvement to intentionally designed systems that monitor student data and identify students who may be off track to graduate as early as possible. She commended staff for their commitment to understanding barriers, implementing targeted supports, and expanding flexible high school credit options to help students stay on track.

Reports presented included the district's eleven-year graduation trend; four- and five-year cohort data; completion rates; comparisons with top 10 districts and local districts; poverty comparison data; and top 10 district comparisons by student groups.

Board Directors asked questions and offered comments regarding changes in graduation requirements, including whether Senate Bill 744 related to essential skills had an impact on the graduation rate. They expressed appreciation to staff for their efforts in supporting student success and noted that this cohort experienced formative years during the pandemic, highlighting the resilience of the graduating class.

8.b. Board Priority: Financial Stewardship

Assistant Superintendent of Operations Brad Earl provided a state and district financial update. The most recent state revenue forecast reflected no significant changes, and as the short legislative session concludes, the district remains hopeful that no mid-biennium cuts will occur. Federal funds are expected to be received as budgeted, though future Title funding remains a concern.

District revenues are slightly below projections, while expenditures are trending lower due to unfilled positions, creating limited savings. Increased utilization of Special Education services through the ESD was noted. In preparation for potential reductions, Superintendent Grazioli has prioritized spending, frozen select positions, reduced travel, and plans to vacate the Biddle building next year, generating approximately \$250,000 in savings.

8.c. Oregon School Employees Association (OSEA) Report

OSEA President Sarah Reames thanked the Board for transparency in the superintendent search and shared challenges in special education, illustrating the daily realities faced by classified staff, including behavioral issues and student dysregulation.

She emphasized the need to restore safety and stability through Board policy, budget decisions, and accountability, highlighting priorities such as consistent training, clear behavior systems, adequate staffing, and competitive compensation. Reames stressed that stable, safe classrooms are essential for family confidence, enrollment, and overall district success.

Board Directors asked about legislative restrictions on addressing challenging behavior and progress in tracking and reporting student-to-staff incidents. They expressed appreciation for the difficult work staff face and concern about sustaining it over time. Directors showed interest in volunteering in classrooms to better understand daily staff experiences and in ensuring these experiences are consistent across sites. They emphasized the need for parent accountability, a welcoming culture for staff to share concerns, and collaborative approaches to finding solutions.

9. Citizen Comments

There were no requests to speak during citizen comments.

10. Recess

The meeting was recessed for 10 minutes.

11. Items for Information & Discussion (continued)

11.a. Education Accountability Act (Senate Bill 141)

Interim Executive Director of Teaching and Learning Todd Bloomquist provided an overview of SB 141, highlighting its five priorities—Meaningful Relationships, Reciprocal & Shared Accountability, Systems-Level Continuous Improvement, Multiple Measures that Matter, and Sufficient & Responsive Resources—and what they mean for the district. The district will establish Performance Growth Targets, select an interim assessment option (likely i-Ready), align reporting systems with state requirements, monitor student progress, and implement interventions for students not meeting targets. The plan includes 2025-26 as the planning year, 2026-27 for pilot implementation, and full implementation by 2029-30. Board Directors raised questions about student opt-out options, assessment data availability, and using i-Ready as a consistent measure.

11.b. Interdistrict Transfers Annual Approval Discussion

Grazioli reported that the district is required annually to declare the number of interdistrict student transfers both into and out of the district. She noted that approval of incoming transfer students would appear later on the consent agenda.

Board Directors expressed interest in reviewing the number of students transferring out of the district and, given ongoing enrollment declines, considering potential revisions to Board policy to limit outgoing transfers. Currently, there are no restrictions on the number of students who may leave the district.

Grazioli recommended that a small group of Board Directors meet with staff within the next week to review the existing policy and determine whether revisions should be brought forward for discussion at the March 5 work session. Directors Zbikowski, Spicer, and Williams were identified to participate in that meeting.

12. Board Action Items

12.a. Logos Public Charter School Renewal Request Approval

A motion was presented by Zbikowski and seconded by Johnsen to approve the Logos Public Charter School contract renewal request and move forward with negotiating the terms of a new contract.

Board Directors Johnsen and Williams shared positive observations while attending the Logos visit.

**Roll call vote: LaNier McHenry: Yea, Spicer: Yea, Williams: Yea, Caballero: Yea, Johnsen: Yea, Zbikowski: Yea, Ferguson: Yea
Result: Motion passed (Yea: 7, Nay: 0)**

12.b. The Valley School of Southern Oregon Renewal Request Approval

A motion was presented by Zbikowski and seconded by Johnsen to approve The Valley School of Southern Oregon contract renewal request and move forward with negotiating the terms of a new contract.

Board Directors Zbikowski, Spicer and Williams shared positive observations while attending The Valley School visit.

**Roll call vote: Spicer: Yea; Caballero: Yea, LaNier McHenry: Yea, Johnsen: Yea, Williams: Yea, Zbikowski: Yea, Ferguson: Yea
Result: Motion passed (Yea: 7, Nay: 0)**

12.c. Exemption from Competitive Bidding Requirements and Use of the Design/Build Contractor Method of Procurement Approval

Prior to a motion, Earl explained the staff recommendation to utilize the Design/Build method of procurement, which requires approval from the Local Contract Review Board (the School Board). He noted that this approach would allow the design and construction phases to be combined, streamlining the process and shortening the overall project timeline. The project would still be publicly advertised, with proposals reviewed in accordance with standard procedures.

Board Directors requested clarification on the motion language, including which sites would be covered. Additional questions were raised regarding insurance coverage, the project timeline, and the Board's role in approving the bid. A request was made for a follow-up on the number of bids submitted.

A motion was presented by Caballero and seconded by Spicer to approve Resolution #2026-1 as presented, approving and granting exemption from competitive bid requirements and authorizing the use of the Design/Build method of procurement for the Oakdale Middle School and Wilson Elementary truss projects.

**Roll call vote: Williams: Yea, Caballero: Yea, Spicer: Yea, LaNier McHenry: Yea, Johnsen: Yea, Zbikowski: Yea, Ferguson: Yea
Result: Motion passed (Yea: 7, Nay: 0)**

12.d. Southern Oregon Education Service District Local Service Plan Approval

A motion was presented by Johnsen and seconded by Zbikowski to approve the Southern Oregon Education Service District 2026-27 Local Service Plan as presented.

Roll call vote: Johnsen: Yea, LaNier McHenry: Yea, Spicer: Yea, Caballero: Yea, Williams: Yea, Zbikowski: Yea, Ferguson: Yea

Result: Motion passed (Yea: 7, Nay: 0)

13. Consent Agenda

The following items were presented on the consent agenda:

- Staff Assignment Report
- Interdistrict Transfers for Non-resident Students

No objections were raised. The consent agenda was approved by unanimous consent.

14. Announcements

Chair Ferguson acknowledged the next Board Work Session scheduled for March 5 at Oakdale Middle School.

15. Adjournment

With no further business, the meeting was adjourned at 7:53 PM.

Exhibit E

Logos Response to More Information on Funding Request



LOGOS
PUBLIC CHARTER SCHOOL
Innovative Education Kindergarten to Career
1203 N Ross Ln, Medford, OR 97501 | 541.842.3658



4/14/2026

Good Afternoon Medford School District Board of Directors,

On behalf of Logos Public Charter School, we extend our sincere appreciation for your continued partnership in serving the students and families of the Rogue Valley. Your leadership in supporting a diverse educational ecosystem, one that includes both traditional public schools and public charter options, continues to benefit our broader community in meaningful ways.

As part of our 10-year charter renewal proposal, we respectfully request your consideration of a gradual reduction in the K–8 sponsorship charge of 1% annually over the next ten years. We offer the following context to support this request and to explain why we believe this is the right time for this conversation.

We acknowledge, transparently, that Logos is currently in a stable financial position. This stability is the result of a consistently conservative and disciplined approach to fiscal management. For example, we routinely budget below our authorized enrollment cap to account for variability in student enrollment, and we take a cautious approach when projecting revenue across differing sponsorship rates. These practices are intentional and reflect our commitment to long-term financial stability and avoiding budget shortfalls.

As a K–12 public charter school in Oregon, we also operate within structural constraints that require this level of discipline. Unlike traditional districts, we do not have access to bond funding for facility construction, acquisition, or seismic upgrades. As a result, we must rely on long-term planning and reserves to meet these essential needs. Additionally, the broader legislative and political landscape surrounding charter schools continues to evolve, requiring us to maintain sufficient reserves to ensure operational continuity. Without the safety net available to traditional systems, financial instability would directly threaten our ability to serve students. At the same time, Logos operates on approximately 58% of the per-student funding received by traditional public schools, requiring us to deliver meaningful, personalized educational opportunities within significantly more limited financial resources.

While this disciplined approach has allowed us to remain stable, it has also required us to limit or defer investments that directly impact students and staff. At present, we are regularly faced with situations where students and families must limit or forgo educational opportunities—not due to lack of interest or need, but due to available funding. For many of our students, this can mean choosing between accessing tutoring support, participating in career pathway experiences, or engaging in enrichment opportunities that could meaningfully shape their future. These are not abstract tradeoffs; these are real decisions families in our community are making today.

Approval of this sponsorship rate reduction would allow us to make meaningful, targeted investments in the following priorities:

Students:

First and foremost, our model is built on student and family choice. We are committed to



allocating no less than 50% of any additional funds generated through this request directly toward expanding educational opportunities for students. This includes increased access to our community partner program, through which students receive instruction, tutoring, and enrichment from approved local providers, as well as expanded pathways programming. These opportunities not only personalize education but also deepen students' connection to the Rogue Valley community and support their development as engaged, contributing citizens.

Staff:

Equally important is our investment in the people who serve our students. While we have made substantial progress toward offering competitive salaries, healthcare costs for employees with dependents have risen dramatically, often reaching 400–500% of the cost experienced by employees within Medford School District. This disparity is largely driven by the smaller size of our risk pool. Addressing this challenge is essential not only for staff well-being, but also for long-term retention. We believe strongly that educators should not be forced to choose between remaining in the profession they are passionate about and securing affordable healthcare for their families.

We also recognize that many of the students we serve have not found success in traditional settings and come to Logos seeking a different path. Through this model, they are not only re-engaging in their education, but in many cases thriving. Expanding access to the supports and opportunities that make this possible will only strengthen outcomes for students across our shared community.

We remain deeply committed to being a positive and contributing partner within the Medford School District community. Logos has consistently demonstrated strong academic outcomes, meaningful student engagement, and a model that elevates student voice and community connection. We are proud of the role we play in enhancing the district's overall reputation and in providing families with high-quality public education options.

In considering this request, we respectfully ask that the conversation extend beyond our current financial position. Rather than asking whether Logos is "doing fine," we encourage a broader question: *What more could be accomplished for students, families, and the community if additional resources were directed toward this model?* This request is not rooted in need alone, but in opportunity, an opportunity to expand what is possible for students who have already demonstrated what they can achieve when given access, flexibility, and support.

We believe our track record demonstrates that when entrusted with opportunity, we deliver meaningful results. We are asking you to partner with us in expanding that opportunity for the students and families we collectively serve.

Thank you for your time, your leadership, and your continued partnership.

Sincerely,

Logos Public Charter School Administration and Board of Directors

Exhibit EF
Logos Mission, Vision, and Purpose

Mission Statement

Personalized Learning is described by the Association of Personalized Learning Services as including the key elements of parent involvement, small class sizes, collaboration between teacher, parent, student and the school; ongoing teacher training flexible learning in multiple environments, including home learning support; flexible curricular choices; multiple assessment tools; technology and varied learning pace. The mission of LPCS is to offer a performance and standards-based, personalized learning program in Oregon to students in grades K-12. LPCS will provide academic excellence through an individualized education, and promote a partnership between families, the community and public education. In high school, this partnership will be expanded to include the business community, in that both academic and skills will be stressed. Students will have an opportunity to develop workplace skills and enhance their organizational, interpersonal, and time management abilities while ensuring a smoother transition to college and the workplace.

Vision:

To inspire a love for learning that produces a lifelong learner.

Logos Purpose Statement:

The purpose of Logos Public Charter School is to graduate critical thinkers who can effectively communicate in the 21st century. Logos facilitates a personalized learning program through a collaborative partnership among the student, family, teacher, school, and community.

Exhibit FG **Philosophical Approach**

Logos Public Charter School ~~will incorporate the concepts of personalized learning, strong business partnerships, a collegial relationship with parents. LPCS's personalized educational program will support its students by offering educational resources, an assigned Educational Specialist (ES licensed or registered teacher)~~ is founded on the core principles of personalized learning, strong partnerships with families, and meaningful collaboration with the business and broader community. At LPCS, education is intentionally designed to meet the unique needs, interests, and learning styles of each student, ensuring that every learner has access to a high-quality, individualized educational experience.

Central to this model is the assignment of a licensed or registered Educational Specialist (ES) who ~~will meet~~ works closely with each student individually, and access to a ~~“classrooms~~ and family. The ES meets regularly with students to guide learning, monitor progress, and adjust instruction as needed. Students also benefit from access to a team of highly qualified staff and a wide range of educational resources within a “classroom without walls.” ~~A quality school of choice for any student~~ approach that extends learning beyond traditional settings.

LPCS is a school of choice open to all students who would benefit from an individualized education, ~~particular outreach would be made to at-risk/high risk youth and students who are currently being homeschooled. The vision statement for this unique school~~ is approach to education, with intentional outreach to at-risk and high-risk youth, as well as students currently engaged in home-based education. The school's vision, “Personalized learning that maximizes parent, community, and academic resources for excellence in education!” ~~Each student will have~~ is reflected in every aspect of its program.

Each student is supported through a Personalized Learning Plan, ~~ensuring that~~ which aligns curriculum, instruction, and assessment ~~will be individualized. Personalized educational options will include:~~ to individual goals and needs. Instructional options are

diverse and flexible, including traditional classroom instruction experiences, independent study, small group instruction, homeschool, parent/community partnership partnerships, project-based learning, service learning, computer interactive, project-based instruction, multimedia, internships, televised courses, apprenticeships, and college campus courses.

LPCS's personalized educational program will support its students by offering educational resources, an assigned Educational Specialist (ES licensed or registered teacher) who will meet with each student individually, and access to a team of other "highly qualified" staff. Staff will receive extensive training, including but not limited to, personalized learning, teaching styles, assessment techniques, higher level questioning, service learning and the principles of project based learning. Parental partnership is a cornerstone of LPCS's educational program. Research has shown parental involvement correlates with improved student achievement. In addition to parental involvement, life-long learning skills and business community partnerships will be stressed internships, and dual enrollment opportunities on college campuses. This variety ensures that students can engage in learning in ways that are most meaningful and effective for them.

Family partnership is a cornerstone of the LPCS model. Parents are active participants in their child's education, working collaboratively with the Educational Specialist to support learning. Weekly communication and regular meetings ensure that progress is monitored, adjustments are made, and students remain on track to meet academic standards.

In addition to strong family partnerships, LPCS emphasizes connections with the business community. Student Through service learning projects, mentoring and apprenticeships will be emphasized. This portion of the curriculum will stress leadership/management skills and mentorships students develop essential life and career skills such as leadership, problem-solving, critical thinking, decision-making, teamwork, high moral and ethical standards and creativity. It is the development team's belief that by recognizing the business community as a critical partner in education, the graduates will be better prepared to enter the world as productive citizens. LPCS will also offer both remediation of basic core subject areas for academically at-risk students teamwork, and ethical decision-making. By integrating real-world experiences into education, LPCS

prepares students to become productive, engaged citizens.

The school is committed to supporting all learners by providing both targeted interventions in core academic areas for students who need additional support and advanced educational opportunities for students those with exceptional aptitudes. The most basic concept of LPCS's educational program believes that teaching approaches must be tailored to each individual student's needs, interests and learning styles.¶

Students will be assessed at initial enrollment for academic levels in math and reading and to determine their unique interests. This information will be used by the certified teachers to develop a Personalized Learning Plan for each student. In addition, through this information, students will learn to recognize and use their strongest skills and abilities to compensate and improve areas of needed growth. At weekly meetings, appraisals will be made on each student's progress toward meeting standards. A standardized computerized assessment tool, such as Northwest Evaluation Association's Measures of Academic Progress may be used on a quarterly basis to gain further information on a student's progress. In addition, Smarter Balanced will be used for mandated state assessments. All of this information will drive curriculum and instruction. The research basis for the principles of personalized learning is extensive and indicates it is critical to link the teaching process with the ways each child obtains and retains information. We believe teaching that is multifaceted, with inherent options and takes into account multiple intelligences, fosters optimal learning. This teacher will communicate weekly with all other teachers working with the student. In addition, this teacher will meet weekly with the student and parent to review the educational plan and make adjustments as needed, review completed work and the student's progress in meeting standards, make assignments, and administer assessments as appropriate. The student attendance, instructional hours and academic representative work samples will be verified. This means choices regarding the types of media to use, the kinds of processes required and end products accepted, allowing all to be successful by providing uniqueness in the learning process. Academic selections will follow Oregon State Standards and will key into a student's interests. The options are limitless abilities. Upon enrollment, students are assessed in key areas such as reading and math to determine academic levels and

identify interests. This data informs the development of each student's Personalized Learning Plan and helps students build on their strengths while addressing areas for growth.

Student progress is continuously monitored through a variety of measures, including ongoing formative assessments, work samples, and standardized tools as well as state-required assessments. This data-driven approach ensures that instruction remains responsive and effective.

At its foundation, LPCS believes that learning is most successful when teaching is tailored to the individual. By incorporating multiple instructional strategies, honoring different learning styles, and providing meaningful choices in how students engage and demonstrate their learning, LPCS creates an environment where all students can thrive.

Exhibit GH
Articles of Incorporation

Articles Of Incorporation Nonprofit
Public Benefit Corporation-Charter
School

Registry Number: 655424-91

FILED
JAN 07 2010
OREGON
SECRETARY OF STATE

**ARTICLES OF INCORPORATION OF
LOGOS CHARTER SCHOOL**

ARTICLE I. NAME

The name of the corporation is Logos Charter School.

ARTICLE II. REGISTERED AGENT

The registered agent of the corporation is John VonDoloski.

ARTICLE III. ADDRESS OF THE REGISTERED AGENT

The address for the registered agent is:

John VolDoloski
1782 Key Drive Medford, Oregon 97501-3941

ARTICLE IV. ADDRESS FOR MAILING NOTICE

The address for mailing notice is:

Logos Charter School
1782 Key Drive Medford, Oregon 97501-3941

ARTICLE V. OPTIONAL PROVISIONS

Federal Tax-Exempt Provisions

5.1 Exclusive Purpose

The corporation is organized exclusively for educational purposes—specifically to provide a personalized public educational program to students in grades K-12 and as such shall qualify under section 501 (c) (3) of the Internal Revenue Code, or the corresponding section of any future tax code.

Limitations on Distributions

ARTICLES OF INCORPORATION 1/7/10

Logos Charter School

1

No part of the net earnings of the corporation shall inure to the benefit of, or be distributable to, its directors, officers, or other private persons, except that the corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in Article 5.1.

5.2 Limitations on Political Activity

No substantial part of the activities of the corporation shall consist of carrying on propaganda, or otherwise attempting to influence legislation. The corporation shall not participate in or intervene (including the publishing or distribution of statements) for any political campaign on behalf of, or in opposition to, any candidate for public office.

5.3 Statutory Compliance

Notwithstanding any other provision of these Articles, the corporation shall not carry on any other activities not permitted to be carried on (a) by a corporation exempt from federal income tax under section 501 (c) (3) of the Internal Revenue Code, or the corresponding section of any future federal tax code, (b) by a corporation, contributions to which are deductible under section 170 (c) (2) of the Internal Revenue Code, or the corresponding section of any future federal tax code, (c) by a corporation exempt from tax under the Oregon Nonprofit Corporation Act, ORS Ch. 65, et seq., or the corresponding section of any future Oregon Statute, or (d) by a public charter school under Chapter 338 of the Oregon Revised Statutes or the corresponding section of any future Oregon Statute.

Oregon Permissible nonprofit Provisions

5.4 Delegation of Director's Powers

The board of directors by resolution in accordance with its corporate Bylaws may authorize a person or persons, or committee to exercise some or all of the powers that would otherwise be exercised by the board. To the extent so authorized, any such person or persons or committee shall have the duties and responsibilities of the board of directors, and the board of directors shall be relieved to that extent from such duties and responsibilities.

5.5 Director's Limited Liability to the Corporation

- A. **Release From Liability:** To the fullest extent permitted by the Oregon Nonprofit Corporation Act, no director or officer shall be held personally liable to the corporation for monetary damages resulting from a person's conduct as a director or officer except they shall remain liable for:
1. any breach of the director's duty of loyalty to the Corporation;
 2. acts or omissions not in good faith or which involve intentional misconduct or a knowing violation of law;
 3. any unlawful distribution;

4. any transaction from which a director derived an improper personal benefit; and
5. for any violation under the Oregon Nonprofit Corporation Act, or the corresponding section of any future Oregon Statute, including without limitation conflicts of interest, unlawful distributions and gross negligence.

B. Indemnification: The following provisions shall apply regarding indemnification:

- (1) The corporation shall indemnify to the fullest extent permitted by The Oregon Nonprofit Corporation Act, any persons who have made, or is threatened to be made, a party to an action, suit or proceeding, whether civil, criminal, administrative, investigative or otherwise (including any action, suit or proceeding by or in the right of the corporation) by reason of the fact that the person is or was a director, officer, employee or agent of the corporation, or a fiduciary within the meaning of the Employee Retirement Income Security Act of 1974 with respect to an employee benefit plan, of another association, corporation, partnership, joint venture, limited liability company, trust or other enterprise. The right to and the amount of indemnification shall be determined in accordance with the provisions of the Oregon Nonprofit Corporation Act in effect at the time of the determination.
- (2) To the fullest extent permitted by the Oregon Nonprofit Corporation Act, the corporation shall pay for or reimburse any and all reasonable expenses incurred by a director, officer, employee, agent or fiduciary of the corporation who is a party to a proceeding in advance of the final disposition of the proceeding.
- (3) For the purposes of determining the right to any indemnification under this Article 5.6, Section B, the termination of any action, suit or proceeding by judgment, order, settlement, conviction or upon a plea of nolo contendere, or its equivalent, shall not, of itself, create a presumption that the person acted in bad faith and in a manner which he or she reasonable believed to be in or not opposed to the best interest of the corporation, and with respect to any criminal action or proceedings, had reasonable cause to believe that his or her conduct was unlawful.
- (4) The right to indemnification and to the payment or reimbursement of expenses with regard to a proceeding referred to in this Article 5.6, Section B shall not be exclusive of any other rights to which any person may be entitled or hereafter acquire under any statute, provision of the Articles of Incorporation, Bylaws, Action by the Board of Directors, or officer, employee, agent or fiduciary of administrators of such person.

ARTICLE VI. TYPE OF CORPORATION

The corporation is a Public Benefit nonprofit corporation. As such, this organization shall admit students of any race to all the rights, privileges, programs, and activities

generally accorded or made available to students and shall not discriminate on the basis of race in administering its educational policies, admissions policies, athletic and other organization administered programs.

ARTICLE VII. MEMBERS

The corporation shall not have members as that term is defined in the Oregon Nonprofit Corporation Act.

ARTICLE VIII. DISTRIBUTION UPON DISSOLUTION

Upon the dissolution of the corporation, assets of the corporation that were purchased with public funds shall be given to the State Board of Education as required by ORS 338.105 or the corresponding section of a future Oregon Statute. All other assets shall be distributed in compliance with the Oregon Nonprofit Corporation Act, ORS Ch. 65, et seq., for one or more exempt purposes within the meaning of section 501 (c) (3) of the Internal Revenue Code, or the corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for a public purpose. Any such assets not so disposed of shall be disposed of by a court of competent jurisdiction of the county in which the principal office of the corporation is then located, exclusively for such purposes or to such organization or organizations, as said court shall determine, which are organized and operated exclusively for such purposes.

ARTICLE IX. INCORPORATORS AND INITIAL DIRECTORS

The name and address of the incorporators and initial directors of the corporation are:

1. John VonDoloski
1782 Key Dr. Medford, OR 97501
2. David Blauser - CPA
1024 NE Hefley St. Grants Pass, OR 97524
3. Helen Blauser
1024 NE Hefley st Grants Pass, OR 97524
PO Box 5544 Central Point, OR 97502
4. Joseph VonDoloski
1491 E. Millbrook Mt. Pleasant, MI 48858
5. James Spence
955 Wilson Rd Central Point, OR 97502

ARTICLE X. EXECUTION OF ARTICLES BY INCORPORATORS/ DIRECTORS

The incorporators, who by their signatures, consent to be named as initial directors of the corporation, execute the Articles of Incorporation for the corporation.

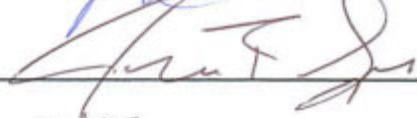
<u>Printed Name</u>	<u>Signature</u>
<u>Joseph D VonDolowski</u>	<u></u>
<u>James T Spence</u>	<u></u>
<u>David Blauer</u>	<u></u>
<u>Helen Blauer</u>	<u></u>
<u>John VonDolowski</u>	<u></u>

Exhibit H

Medford Charter Subcommittee Recommendations on Charter Requests

Charters may request changes to their contract during the renewal negotiation process. This might include changes such as the option for year round school, increases in enrollment caps, or changes in grade levels served. Charters may also request changes outside of the contract renewal negotiation process. In evaluating such requests, the Board will consider the charter's prior track record including academic, fiscal, and organizational performance; instructional quality and fulfillment of the charter's mission.

Sample criteria to evaluate requests include (but are not limited to) the following considerations.

1. **Urgency:** Is the request within 12 months of a charter contract renewal date?
Requests within 12 months of a future renewal should be considered as part of the contract renewal. Similarly, the Board will not consider requests that occur within 12 months following contract renewal.
2. **Capacity:** Does the charter have the institutional capacity to handle the requested change? Are there limitations due to physical space, Charter Board or administrative stability, or staffing concerns?
3. **Rationale:** What is the charter's rationale for requesting the change? Does the proposed change improve outcomes for students or allow the charter to operate more efficiently?
4. **Mission:** Does the request alter the mission of the original charter? For example, a charter approved to support home school students requesting a change to educate all students in traditional school setting. (Requests altering the core mission of the original charter proposal will not be considered.)
5. **Finances:** Is the charter fiscally responsible? Are state school funds being used exclusively for the fulfillment of the school's mission in educating students?
6. **District Measures:** Does the request help MSD in the fulfillment of measures of the system, specifically reducing the achievement gap and increasing graduation rates?
7. **Equity, Diversity and Inclusion:** Does the request advance equity, diversity and inclusion in the charter school?

Further, the Subcommittee recommends the following considerations for analyzing future reimbursement rate requests from charter schools:

To be eligible for an increase above 80%, a charter must have an economically disadvantaged student population in excess of the District average for economically disadvantaged student populations.

1. For each 10% increase above the District average, the charter may be eligible for up to an additional 2% pass through, up to a maximum rate increase of 5%.

Notwithstanding the above, the Board reserves the right to not make any changes outside of the contract renewal process.

Exhibit IJ
Technology Matrix

Student Information System (SIS)	MSD pays per student cost for Synergy base package and modules purchased by the district.
Phones	MSD provides phone service and up to 10 phones. Charter pays for additional phones.
Internet Access/Network	MSD provides 100% (except KUA – who would need to use District network/switches, etc. to get this service). District provides initial fiber set up; Charter pays the cost to Hunter Communication to move fiber if they change property locations at approximately cost of \$2,500.
Wireless	MSD provides up to 10 access points. Charter school pays for additional access points at approximate cost of \$600/ea.
Help Counter/VIMS	MSD provides single desktop and service.
Computers	2 to 3 units provided by MSD to Charter school for office staff access to network. Upon 30 days advance notice and subject to availability, District may be able to provide units for computer-based testing.
Intranet	Login provided – no cost
Tech Support – either remote or onsite	Charters pay outside providers for tech support. On a very limited basis, District will support MSD provided equipment and software.
Facilities/Technician	Charter schools fall under Group II facility use rates for District facilities for student-based activities. Charter pays technician fee for use of auditorium(s).
iReady	Charter Schools are responsible for costs associated with iReady.
Special Education Teacher	District teacher technology package is provided for District employed teachers, including SPED teachers located at a Charter school.
Background Checks	District pays for background checks for Charter employees. Drug screening and fingerprinting are paid by Charter.
Safe Schools	Provided by District at District cost.
Email	MSD provides upon request.



Charter Contract

Between

Logos Charter School

&

Medford School District 549C

July 1, 2026 - June 30, 2036

Table of Contents

Contract	6
1. Grant of Renewed Charter	6
2. Conditions Precedent to Renewal of Charter	6
3. Effective Date	6
4. Educational Program	6
A. Age and Grade Range	6
B. Curriculum	6
C. Student Assessment/Graduation Requirements	7
D. Access to District Programs/Extracurricular Activities	8
E. Records	8
F. Non-religious and Non-discrimination	9
G. Open Enrollment	9
H. Notices for Enrollment and Withdrawal of Non-Resident Students	10
I. Student Attendance, Conduct and Discipline	11
J. Education of Special Populations	12
K. Tuition and Fees	14
L. Student Welfare and Safety	15
M. School Year; School Day; Hours of Operation	15
N. Alternative Education Model	16
O. Accreditation	16
5. Evaluation of Student Performance and Procedures for Corrective Action	16
6. Economic Plan, Budget and Annual Audit	17
A. Funding	17
B. Budget	18
C. Financial Records, Audits and Accounting Reports	19
7. Building and Facilities	21
8. Governance and Operation	22
A. Corporate Status	22
B. Non-religious, Non-sectarian Status	22
C. Non-discrimination	22
D. Public Meeting and Public Records	22
E. School Board	23
F. Website	23

G.	Operational Powers	23
H.	Third Party Contracts	24
I.	Annual Report and Review	25
J.	Term	25
K.	Termination	26
L.	Dissolution	27
M.	Property Inventory Control	27
9.	Employment Matters	28
A.	Criminal Background checks, Sexual Conduct Clearance, and Pre-employment Drug Screen.	28
B.	Teacher and Administrator Licensure/Registration Requirements.	29
C.	Logos Responsibilities	29
10.	Insurance and Legal Liabilities	30
A.	Insurance	30
B.	Legal Liabilities	31
C.	Waiver	32
D.	Full Faith and Credit	33
E.	Indemnification	33
F.	District Disclaimer of Liability	34
G.	ADA/§504 Obligations	34
H.	Transportation	34
11.	Renewal of Contract	35
12.	Miscellaneous Provisions	36
A.	Entire Agreement	36
B.	Governing Law	37
C.	Assignment	37
D.	Terms and Conditions of Application	37
E.	Conflict between Application and Contract	37
F.	District Liaison	38
G.	Amendment	38
H.	Notice	38
I.	Definition of Business Day	38
J.	Address of Parties for Purpose of Written Notice	38
K.	No Waiver	39
L.	Dispute Resolution	39

M.	Severability	40
N.	Delegation	40
O.	Prior Actions	40
P.	Attorney Fees	40
Q.	Exhibits	41
R.	Logos Authority to Enter Into Contract	41
	Addendum 1: OSBA Memorandum of Understanding	42
	Exhibit A: Logos Renewal Request	43
	Exhibit B: District Response to Renewal	46
	Exhibit C: District Office Recommendation	47
	Exhibit D: District Board Minutes	48
	Exhibit E: Logos Response to More Information on Funding Request	54
	Exhibit F: Logos Mission, Vision, and Purpose	56
	Exhibit G: Logos Philosophy	57
	Exhibit H: Logos Articles of Incorporation	59
	Exhibit I: Medford Charter Subcommittee on Charter Requests	64
	Exhibit J: Technology Matrix	66

CHARTER SCHOOL CONTRACT

THIS CONTRACT dated effective as of July 1, 2026 is made and entered into by and between the Medford School District 549C (“District”) and Logos Charter School (“Logos”) an Oregon nonprofit corporation.

RECITALS

WHEREAS, the Oregon Legislature has enacted ORS Chapter 338 for certain purposes enumerated in that chapter; and

WHEREAS, the District and Logos are currently parties to a charter school contract dated July 1, 2021, which contract has a term of July 1, 2021 through June 30, 2026; and

WHEREAS, on December 8, 2025, a renewal request (attached and incorporated as Exhibit A) was submitted by Logos to District for the continuation of Logos as a charter school to operate within District; and

WHEREAS, the District School Board held a public hearing on February 19, 2026 on the provisions of the proposal in accordance with the ORS Chapter 338 and evaluated the criteria set forth in ORS Chapter 338; and

WHEREAS, THE RESOLUTION ADOPTED by the District Board on February 19, 2026, a copy of which is attached and incorporated herein as Exhibit D, approved the renewal of the charter contingent upon the negotiation and execution of a contract acceptable to Logos and District; and

WHEREAS, this contract between Logos and the District, including the Exhibits, will constitute the full and complete agreement between the parties regarding the governance and operation of Logos; and

WHEREAS, the parties desire that Logos be authorized to operate and conduct its affairs in accordance with the terms of this agreement and ORS Chapter 338; and

WHEREAS, Logos continues to be an established non-profit organization under the laws of the state of Oregon, exempt under 501(c)(3) of the Internal Revenue Code, and is not associated with a nonpublic sectarian school or a religious institution, or otherwise religious based;

NOW, THEREFORE, in consideration of the foregoing recitals and the mutual understandings, releases, covenants and payments herein described, the parties agree as follows:

Contract

1. Grant of Renewed Charter

Logos is granted, in accordance with ORS Chapter 338 and the terms and conditions of this contract, a renewed charter to operate a single public charter school located within the boundaries of the District as described herein.

2. Conditions Precedent to Renewal of Charter

In order for Logos to continue to operate as a public charter school sponsored by the District under a renewed charter contract, the following conditions shall be met:

- A. Logos shall remain in compliance with all provisions of the existing charter contract and with all state and federal laws governing public charter schools for the remainder of the 2025-26 school year.

3. Effective Date

This contract shall commence on July 1, 2026, and shall expire on June 30, 2036, unless sooner terminated pursuant to the provisions herein.

4. Educational Program

A. Age and Grade Range

- i) Beginning with the commencement of the 2026 school year and continuing throughout each school year during the term of this contract, Logos shall provide instruction to students in kindergarten through the twelfth grade.
- ii) In accordance with Medford School District policy, Logos shall only enroll a student in its kindergarten program if the student has reached the age of five (5) on or before September 1 of the year the student is seeking enrollment. Logos shall only enroll a student in its first grade program if the student has reached the age of six (6) on or before September 1 of the year the student is seeking enrollment.
- iii) Exceptions may be made to (ii) above in accordance with any exceptions allowed by District board policy JEBA -Entrance Age.

B. Curriculum

District agrees to waive its curricular requirements, to the extent permitted by Oregon law, but subject to the provisions of this Section 4.B.

- (i) Logos shall have the authority and responsibility of designing and implementing its educational program, subject to the conditions of this contract, in a manner which is consistent with state law.
- (ii) The educational program, pupil performance standards and curriculum designed and implemented by Logos shall be aligned to, and meet or exceed any content standards adopted by the State of Oregon and shall be designed to enable each pupil to achieve such standards.
- (iii) Logos agrees to comply with all state requirements concerning academic content areas as defined in ORS 329.045.
- (iv) Logos' core curriculum materials offered to students/families will meet Oregon State Standards. Logos will provide to the District an outline of its core curriculum and educational program upon request.
- (v) Logos shall adhere to the philosophy and mission, goals and objectives, and curriculum as set forth in addendum Exhibits F & G, the terms of which are incorporated herein by reference except as may otherwise be amended by the terms of this contract and any fundamental changes thereto shall require the prior written consent and approval of the District. A "fundamental change" is defined as changing the academic focus of Logos, its philosophy or mission, or adopting a curriculum that does not meet District or state standards. The District, in its sole discretion, may approve or disapprove of any such fundamental change.
- (vi) Logos shall maintain and publish to their website and prominently displayed at the school a written policy for resolving complaints against Logos, including complaints regarding curriculum. A current copy of the policy will be available on the charter school's website and posted within the building.

C. Student Assessment/Graduation Requirements

- (i) All students enrolled and attending Logos shall participate and take part in all mandatory statewide and federal assessments developed by the Oregon Department of Education under ORS 329.485, as well as any assessment required of public charter schools by the Oregon Department of Education, the United States Department of Education or the Oregon Legislature to implement the Every Student Succeeds Act (ESSA) assessment requirements. All Logos families will have access to opt out procedures in accordance with state law and district policies. All costs associated with administering and scoring the required assessments, as well as training, shall be paid for by Logos

unless otherwise agreed to by the District in writing (see Technology Matrix – Exhibit I).

- (ii) The graduation requirements of Logos will be at or above the minimum requirements of the Oregon Department of Education.
- (iii) In addition to the required state or federal assessments described in section 4.C(i), Logos is required to participate in the common district diagnostic assessment window for Kindergarten through 8th grade. Unless required by law, any other district-required assessments are not required for Logos.

D. Access to District Programs/Extracurricular Activities

Logos students are allowed to participate in interscholastic activities listed in OAR 581-026-0005, -0700, -0710 in the district in which they reside. The law allows for a fee of up to 5% of the district general purpose grant per ADMw to be paid to the district from the charter school. This is a 5% maximum regardless of the number of activities the student participates in. The district can charge an additional 5% for activities that require enrollment in a course for credit. Students must adhere to state laws, Board policies, regulations and rules concerning conduct and discipline, including OSAA rules and regulations, and are subject to any fees.

E. Records

- i) Logos shall comply with all record keeping requirements of state and federal law pertaining to student records and shall cooperate with the District by providing any reports or records to the District, as necessary, to meet the District's reporting obligations to the Oregon Department of Education or the U.S. Department of Education. Student records include, without limitation, immunization records, class schedules, records of academic performance, disciplinary actions, attendance, documents required pursuant to the statewide assessment system under ORS 329.485, and any documents required under federal and state laws regarding the education of students with disabilities.
- ii) Logos shall comply with all applicable federal and state laws concerning the maintenance, retention and disclosure of student records, including, without limitation, the Oregon Public Records Law.
- iii) Logos shall maintain up-to-date student records including enrollment, attendance and behavior in the District 549C Student Information System.

F. Non-religious and Non-discrimination

The educational program of Logos shall be non-religious and non-sectarian. Logos shall conform to all state and federal statutory and constitutional provisions prohibiting discrimination and shall not discriminate against any student or staff member on the basis of race, creed, color, sex, national origin, religion, ancestry, disability, marital status, sexual orientation, gender identity or political beliefs and/or affiliations.

G. Open Enrollment

- i) Student enrollment in Logos shall be voluntary. All students, including students with disabilities, who reside in the District and meet legal age requirements applicable to a grade level will be eligible for enrollment if space is available.
- ii) As provided in ORS 338.125(2), if space is available, Logos may admit students who do not reside in the District.
- iii) As provided in ORS 338.125(3)(b), Logos may give admissions preference to 1) students who were enrolled in the prior year, unless expelled and 2) applicants who have siblings who are presently enrolled and who were enrolled in the prior year. Any additional preferences not specifically outlined in laws governing charter school operations in the State of Oregon will require the submission of a waiver approved by the Oregon State Board of Education prior to implementation of said preference for admission status.
- iv) Maximum school enrollment for the 2026-27 school year shall be an average for the year of 1329 students. By 2031, the maximum average enrollment shall be 1500 with measured growth between years 2027-2031. Expansion of Logos outside of the above numbers would be determined by Medford Charter Subcommittee on Charter Request (Exhibit H) and approved by the Medford School Board. It would be determined by the strength of the infrastructure of Logos and the academic success of Logos students.
- v) If the maximum enrollment set forth in Section 4.G.iv is met, a lottery process will be implemented conforming to ORS Chapter 338. Using the lottery process Logos shall establish a waiting list of students who shall be offered the opportunity to enroll at Logos if additional space later becomes available. The waiting list shall carry over to subsequent years.
- vi) Logos shall not permit concurrent enrollment of any student at both Logos and another public school.

- vii) The minimum enrollment for each school year shall be 25 full-time students. The District shall have the right to terminate this contract at a semester break if student enrollment in Logos falls and remains under 25 students for twenty (20) or more days during any school year, as provided in ORS Chapter 338. For purposes of this contract, “full-time student” means a student who is receiving more than one-half of his/her instructional program at Logos.

H. Notices for Enrollment and Withdrawal of Non-Resident Students

- (i) Logos shall provide the District with written notice of the enrollment of any student who does not reside within the District. Such notice shall be provided within ten (10) days of the enrollment. Within ten (10) days of enrollment, Logos shall provide to the student’s parent, legal guardian or person in parental relationship written information about:
 - a. The District’s responsibility to identify, locate and evaluate students enrolled in Logos to determine which students may be in need of special education and related services as provided by ORS 338.165; and
 - b. The methods by which the District may be contacted to answer questions or provide information related to special education and related services.
- (ii) Logos shall provide the District with written notice of the withdrawal from Logos for any reason other than graduation from high school of any student who does not reside within the District. Such notice shall be provided within five (5) business days of the withdrawal. Within five (5) business days after receiving such notice, the District shall:
 - a. Provide to the school district in which the student resides written notice that the student has withdrawn.
 - b. Provide to the student’s parent, legal guardian or person in parental relationship written information about:
 - 1. The responsibility of the school district in which the student resides to identify, locate and evaluate students who reside in the school district to determine which students may be in need of special education and related services as provided by ORS 338.165; and

2. The methods by which the school district in which the student resides may be contacted to answer questions or provide information related to special education and related services.

I. Student Attendance, Conduct and Discipline

- i) Logos shall implement a system of uniform student discipline consistent with Oregon law. Revised copies will be provided to the District each time any changes are made to the policy.
- ii) Logos shall notify its students and parents of the student rights and responsibilities at the beginning of each school year, or as the student meets the admission requirements as stated in this contract. Student rights and responsibilities will also be published in the parent handbook.
- iii) Logos shall maintain up-to-date enrollment information using District student information system. Enrollment information shall be entered no later than the close of the day the student starts in classes, and attendance information shall be entered on at least a weekly basis, with monthly reports provided to the District.
- iv) Logos shall notify the district in which the student resides immediately upon a student being expelled from Logos and provide a copy of the written expulsion notice. All suspension and expulsion records shall be entered in the District student information system and a detailed written notice of student expulsions provided to the District within 3 business days of the event.
- v) Logos and the District shall honor the suspension and expulsion of a student of the other, unless both parties agree in writing to a variance from this requirement.
- vi) Truancy - Student attendance at Logos will be in compliance with Oregon compulsory attendance laws. Per state law, Logos shall drop any student who is unaccounted for after 10 consecutive school days. Staff will make every available attempt to locate a student's whereabouts prior to dropping them.
- vii) Logos will comply with Oregon Department of Education's requirements for claiming and recording attendance.
- viii) Academic Expectations - LPCS and an enrolling child's parent or learning coach will annually agree prior to enrollment that at any time when the student is not making a minimum of one year's progress in all subjects and/or not working towards meeting or exceeding

academic standards, objectives, goals, or grade level benchmarks for the year, an academic plan of assistance and/or intervention with Logos administration may be held to help resolve any and all issues in order to get the student back on track. The parent or learning coach also agrees annually that if an academic plan of assistance or intervention is not followed or if they choose not to attend a scheduled intervention or meeting to discuss the child's progress, that it may result in the student's withdrawal from Logos. Logos is a school of choice and only following the agreed upon academic plan can a student stay enrolled in the school. The parent will be strongly encouraged to enroll their child in another program in which the student can be more successful.

J. Education of Special Populations

i. Education of Talented and Gifted Students

Logos shall comply with ORS 343.391 - 343.413 and administrative rules adopted by the State Board of Education for implementing these statutes. Logos will provide identified TAG students with instruction commensurate with their rate and level of learning. Logos will have access to district TAG forms but will not be required to use them. Logos will establish a TAG process that complies with state law.

Education of English Language Learners (ELL)

- ii. Logos shall identify ELL students and provide them with language acquisition instruction by a qualified instructor. The District may be contracted for these services and thus would retain the additional ADM for that service.

iii. Education of Students with Disabilities

a. Special Education

1. Logos will include the following notification in the parent/student handbook, website, and other parent materials.

The Medford School District has the responsibility to identify, locate, and evaluate to determine a student's needs for special education and related services and to provide those special education services at the charter school. The Medford School District holds this responsibility for all students enrolled in a district-

sponsored charter school, regardless of where the student resides.

If you have questions about special education evaluations and services, please contact the Medford School District's Special Education and Student Services Office at 541.842.3628.

2. Upon enrollment of a student with a disability at Logos, Logos will notify the resident district of the student's enrollment by requesting records, including special education records, from the previous school. The District, as the sponsoring district, will convene an Individualized Education Program (IEP) meeting with individuals knowledgeable about the student to evaluate the student's individual needs and to determine an appropriate placement for the student. The parent, school, and District staff will be included in this meeting.
3. If the IEP team determines the student's educational needs cannot be met at Logos, an alternate placement will be recommended with the resident district.
4. Students with disabilities who are enrolled in Logos shall be provided with programs implemented in accordance with federal and state laws and local policies and procedures, specifically the Individuals with Disabilities Education Improvement Act (IDEIA), Section 504 of the Rehabilitation Act of 1973, Oregon Administrative Rules (OARs), and the District's School Board Policies and procedures related to special education. Copies of the District's policies and procedures will be provided to Logos.
5. The District Board Policies related to students with disabilities that will be adhered to by Logos include, but are not limited to:

IGBAE/ IGBAE-AR—Special Education:
Participation in Regular Education Programs

JGDA/ JGDA-AR—Discipline of Students with
Disabilities
6. The District Special Education Procedures related to students with disabilities that will be adhered to by

Logos in collaboration with the District include, but are not limited to:

1. Child Find,
 2. Pre-Referral Process,
 3. Screenings for Students Not Eligible for Special Education,
 4. Request for Special Education Evaluation,
 5. Individualized Education Program, and
 6. Student Behavior and Discipline
7. The District, as the sponsoring district, is the responsible party to provide a Free Appropriate Public Education (FAPE) to each eligible student with a disability enrolled in Logos. Logos shall be responsible to implement the accommodations and modifications as outlined in the student's IEP.
8. Transportation for special education students will only be provided to a student attending Logos if it is included as a related service on the student's IEP.

(iv) Section 504

Logos will provide reasonable accommodations to students with a physical or mental impairment that substantially limits a major life activity if and to the extent required to enable such students to have an opportunity to be successful in their educational program equal to that of their non-disabled peers. Logos shall prepare a 504 Accommodation Plan in accordance with Section 504 of the Rehabilitation Act and its implementing regulations.

(v) Training Related to Special Education and Section 504

Logos may request training related to special education, students with disabilities, and Section 504, at no charge, from District.

K. Tuition and Fees

Logos shall not charge tuition to students attending Logos. Logos shall not charge tuition for programs, classes or courses of study which are part of the regular school program. Logos may charge reasonable deposits and fees in

accordance with ORS 339.155 for optional, programs and student activities.

L. Student Welfare and Safety

Logos shall comply with all applicable state and federal laws concerning student welfare, safety and health, including, without limitation, the reporting of sexual conduct and child abuse, accident prevention and disaster response, and any local, state or federal regulations governing the operation of school facilities and submit to the District a plan for training of staff in these areas as well as documentation of completion.

6.1.1.1. Logos is responsible for the reporting of sexual conduct, child abuse and neglect in accordance with state law.

6.1.1.2. Logos shall immediately inform the District Liaison of any incident regarding sexual conduct, child abuse and/or neglect.

6.1.1.3. Logos shall comply with state and federal law relating to drug administration to students.

- i) Logos shall comply with OAR 584-020-0041, the Teacher Standards and Practices Commission requirements that the chief administrator report certain acts of gross neglect of duty by licensed staff.
- ii) Logos shall participate in the safe schools online trainings offered by the District including sexual conduct and child abuse reporting, blood-borne pathogens, etc. All staff will be trained by October 31 of each year.

M. School Year; School Day; Hours of Operation

Logos shall operate an instructional program in accordance with Section 4.B of this contract, unless otherwise stated in this contract. The school calendar shall be similar but may vary from the District's school calendar. Logos will meet or exceed all instructional hour requirements in OAR 581-022-2230. Logos will determine and publish its school calendar annually, and will provide a copy to the District by May 1.

Logos will ensure when providing the calendar that it has scheduled enough instructional hours to comply with ODE's directive of minimum instructional hours required by law. In order to be in compliance with the provision that a student must "have access to appropriately licensed or registered teachers for every day of enrollment in which state school funding is claimed" Logos licensed and registered teachers will respond to any communication from a student in a timely manner. Any communication by a student directed to an

appropriately licensed teacher must be responded to within 24 hours. If communication occurs on a weekend, holiday, or break, the teacher must respond within 24 hours of the next school day. If the student's regular education teacher is unavailable (professional development, sick, on leave, or otherwise inaccessible), a different appropriately licensed teacher may respond in place of a student's regular teacher.

N. Alternative Education Model

Subject to applicable state law, federal law, and the terms of this contract, Logos shall be allowed to promote and implement learning situations that are flexible with regard to environment, time, structure and pedagogy.'

O. Accreditation

Logos shall maintain accreditation at the high school level.

5. Evaluation of Student Performance and Procedures for Corrective Action

A. Logos shall pursue and make reasonable progress toward achievement of the goals, objectives and student performance standards consistent with those set forth in this section, provided that such goals, objectives and student performance standards shall at all times remain in compliance with Oregon law and the provisions of this contract. Logos shall summarize its progress toward meeting these academic goals in the annual report to the District.

B. Logos will assure that Logos will produce similar results in core subjects of students meeting or exceeding state and District academic performance standards for their like age group schools (Smarter Balanced, Oregon State grade-level benchmark assessments, Graduation rates) and that all Logos students will be encouraged to participate in the standard District-wide assessments required by the State of Oregon per Oregon assessment procedures, and in accordance with state opt out laws.

C. For purposes of Section 5, paragraph B of this contract, the data will be disaggregated by the following student groups when comparing student assessment scores:

- i) race/ethnicity
- ii) students with disabilities
- iii) limited English proficient (LEP)
- iv) economically disadvantaged

v) grade level

For purposes of this contract, student assessment scores shall be compared by student groups when there are a statistically significant number of students in that group. The term “statistically significant” shall mean six (6) or more students.

- D. Logos will engage in a continuous school improvement process through its participation in the Oregon Department of Education’s Integration Grant, which is submitted through the District. The required plans, including baseline data, improvement goals, action steps, and progress monitoring, are developed, maintained, and reported in accordance with ODE Integration Grant requirements and can be accessed through that process. Through the Integration Grant agreement and submission, the District has access to all relevant data and reporting associated with Logos’ school improvement efforts. Logos will implement and monitor these plans as part of its ongoing commitment to improving student outcomes, and progress will be reviewed annually as part of the District’s annual review of Logos.
 - E. If, following any revisions under Section 5.D, above, Logos’ student assessment scores by subgroup and grade level are not at or above the District’s assessment scores by subgroup and grade level for a second consecutive year, then the District may take action to direct school improvement. If satisfactory improvement is not made, the district may take action to terminate the charter contract under Section 8, item K.
 - F. If Logos fails to follow any of the actions stated in any of the SIP as stated above the District shall issue a written notice to Logos that it must comply with the terms of the SIP immediately. If, after fifteen (15) business days, Logos is not in compliance with the SIP, the District may begin the process of terminating Logos’ operation as a public charter school under Section 8, paragraph I of this contract.
 - G. Logos may request the District’s average score for its students that have taken the statewide assessment within ten (10) business days of the District receiving those scores.
6. Economic Plan, Budget and Annual Audit
- A. Funding
 - (i) Except as provided in Section 6.A.(ii) of this contract, the District shall provide funding to Logos an amount per weighted average daily membership (ADMw) of Logos that is equal to 80 percent of the amount of the District’s general purpose grant per ADMw as calculated under ORS 327.013 for Logos students in grades kindergarten

through eighth and 95 percent of the amount of the District's general purpose grant per ADMw as calculated under ORS 327.013 for the Logos students in grades ninth through twelfth. Funding shall be determined based on monthly ADMw reports provided to the District by Logos, with an annual reconciliation after the District receives the final ADMw report from the Oregon Department of Education. So long as Logos is not in violation of ORS Chapter 338, this funding will be made available to Logos, commencing on the date set forth and according to the distribution schedule set forth in Section 6, paragraph C, subparagraph (vi) below. The District will adjust the funding to reflect the actual funded pupil count as of October 1 of each year. In addition, to the extent the District experiences any reduction or increase in its state funding, proportionate reductions or increases will be made to Logos by adjustment or setoff in subsequent months. This amount is calculated by the Oregon Department of Education and provided to the District on the State School Fund District Estimate that the Department of Education periodically provides to school districts.

- (ii) Pursuant to ORS 338.165, if a student is enrolled in Logos and is eligible for special education and related services, an additional amount shall be added to the ADM of Logos as described in ORS 327.013(1)(c)(A)(i). The payment per ADMw in Logos that is attributable to the student who is eligible for special education and related services shall equal an amount that is at least equal to: (a) 40% of the amount of the General Purpose Grant per ADMw for the District, as calculated under ORS 327.013, for students who are enrolled in kindergarten through eighth grade; and (b) 47.5% of the amount of the General Purpose Grant per ADMw for the District, as calculated under ORS 327.013, for student who are enrolled in ninth grade through twelfth grade.
- (iii) The District shall provide funding to Logos consistent with the requirements of ORS 338.157.
- (iv) Any financial commitment on the part of the District contained in this contract is subject to appropriation by the State of Oregon and the parties agree that the District has no obligation to fund Logos' operations except as expressly provided herein or in ORS Chapter 338.

B. Budget

- (i) On or before May 5 of each year, Logos shall submit to the District Logos' projected enrollment and proposed budget for the upcoming school year.

- (ii) On or before July 1 of each year, Logos shall submit to the District Logos' adopted budget for the upcoming school year.
- (iii) Logos shall be responsible for all costs of subcontracting for goods and services, except as expressly provided in this contract.
- (iv) The fiscal year of Logos shall begin on July 1 of each year and end on June 30 of the subsequent to coincide with the District's fiscal year.

C. Financial Records, Audits and Accounting Reports

At all times, Logos shall maintain appropriate governance and managerial procedures and financial controls including, but without limitation, (a) accounting and financial record keeping procedures which reflect Generally Accepted Accounting Principles (GAAP); (b) procedures for cash management, investment practices and financial reporting; (c) balance sheets reflecting assets, expenditures and liabilities; (d) segregation of duties for individuals performing cash management and investment practices; and (e) processes reflecting annual review of such systems by both Logos and the District. Logos' accounting methods shall be compatible with the budget and accounting system of the District, and shall comply in all instances with applicable governmental accounting requirements that explicitly apply to charter schools. In addition:

- (i) Logos agrees to establish, maintain and retain appropriate financial records in accordance with applicable state and federal laws and to make such records available to the District. Within 60 days of the end of each month Logos shall submit to the District monthly income and expense reports, as well as a monthly balance sheet showing liabilities and assets. Upon request Logos will provide an Aged Accounts Payable statement showing any accounts that are 30, 60, 90 or 90+ days past due within 10 days of the District's request to do so.
- (ii) Logos shall have an annual audit of its accounts in accordance with Municipal Financial Audit Law, ORS 297.405 to 297.555 and 297.990. Logos will utilize an independent, third-party, certified auditor to conduct all required annual audits. The selected auditor will have demonstrated experience serving schools of similar size and complexity or greater. Logos shall submit this audit, along with copies of letters from Logos' auditor to the Logos board of directors, to the District by December 15 of each year. In addition, Logos shall provide a copy of the audit report to Oregon Department of Education and the State Board of Education.
- (iii) Logos shall submit Logos' Internal Revenue Service Form 990 to the IRS by the 15th day of the 5th month following the end of its fiscal year

(November 15), or within any extension approved by the IRS, and shall provide a copy to the District upon request.

- (iv) Logos shall operate in accordance with generally-accepted accounting procedures (GAAP) or other generally-accepted standards of fiscal management, provided that Logos' accounting methods shall comply in all instances with applicable governmental accounting requirements.
 - (v) Logos shall maintain up-to-date enrollment using the District SIS.
 - (vi) The District shall distribute to Logos funds as determined in Section 6, paragraph A of this contract, in the following amounts on or before the following dates for each school year:
 - July 25 - 16.66 percent
 - August 25 - 8.33 percent
 - September 25 - 8.33 percent
 - October 25 - 8.33 percent
 - November 25 - 8.33 percent
 - December 25 - 8.33 percent
 - January 25 - 8.33 percent
 - February 25 - 8.33 percent
 - March 25 - 8.33 percent
 - April 25 - 8.33 percent
 - May 25 - balance
- (1) An annual reconciliation adjustment per ODE final ADMw calculation will occur after the District receives the report.

The parties mutually agree that the above payment schedule is intended to follow the disbursement schedule of State School Fund payments to the District under ORS 327.095. The parties further agree that should the disbursement schedule of the State School Fund be modified during the term of this contract, the disbursement schedule of payments from the District to Logos shall be modified to reflect such changes. The District shall still be required to transfer the payment

due Logos under this contract within ten (10) days of the receipt of such payment from the State School Fund.

- (vii) In the event that this contract is revoked, terminated or not renewed by the District, Logos shall refund to the District all unspent public funds that were given to Logos by the District other than the amount sufficient to cover all accrued, but unpaid expenses.
 - (viii) The parties acknowledge that under ORS 338.155(9)(b) Logos is entitled to other state sources of funds, such as grants from the Oregon Department of Education that are available to school districts based solely on the weighted average daily membership (ADMw) of the school district which are not included in this contract and/or which are not part of the state school fund formula. Logos will only be eligible to receive grant funds from the District if Logos students were used in grant application calculations and Logos is providing the services for students qualifying for funding.
 - (ix) The parties acknowledge that under ORS 338.155(9)(a) Logos may apply for any grant that is available to school districts or non-chartered public schools from the Oregon Department of Education.
 - (x) Logos may accept gifts, donations or grants pursuant to ORS Chapter 338, provided that no such gifts, grants or donations may be accepted if contrary to applicable law or the terms of this contract. In the event that Logos solicits funding from other sources than the District, it shall comply with all applicable state and federal laws regarding reporting of such charitable solicitations.
- D. Notwithstanding Section 6, paragraph A and Section 6, paragraph C, subparagraph (vi) of this contract, if Logos has not submitted the proposed budget, the adopted budget, the annual audit or any other financial information the District requests by the date Logos is to provide the information to the District, the District may withhold any and all State School Fund payments to Logos until the information is received by the District.

7. Building and Facilities

- A. Logos will be located at a school facility within the District boundaries. Currently, Logos' facility is located at 1203 N. Ross Lane, Medford, Oregon 97501. Logos shall take the necessary steps to obtain and maintain in full force and effect throughout the term of this contract the appropriate and necessary occupancy permits and any other health and safety permits and approvals for the operation of a charter school at the facility. Certification of such permits and approvals shall be submitted to the District by September 1 of the first year of occupancy and then on September 1 of any year in which there was a change requiring new permits and approvals.

- B. Logos may change its physical location or obtain additional facilities within the District boundaries provided that Logos fulfills the obligations and provides the information set forth in this section with respect to such new or additional facilities and provided further that Logos notifies the District of the proposed change in location or addition of facilities not less than thirty (30) calendar days prior to taking any final action in connection therewith.
- C. Logos may locate satellite hubs to support students in other areas as long as its main location is within district boundaries.

8. Governance and Operation

Logos shall govern and operate the charter school to the extent permissible under federal and state law and subject to all conditions of this contract.

A. Corporate Status

Logos is and shall remain for the term of this contract an Oregon nonprofit corporation. In addition, Logos is and shall remain for the term of this contract an organization exempt from taxation under Section 501(c)(3) of the Internal Revenue Code. Logos shall not make any changes to its Articles of Incorporation or bylaws which would or could result in a fundamental change to the educational program or curriculum described in Section 4 of this contract without the prior written approval of the District. Within thirty (30) days after making any changes to its Articles of Incorporation or bylaws, Logos shall notify the District of any changes Logos makes to such documents.

B. Non-religious, Non-sectarian Status

Logos agrees that it shall operate in all respects as a non-sectarian, non-religious public charter school. Logos shall not be affiliated with any non-public sectarian school or religious organization.

C. Non-discrimination

Logos shall comply with all federal and state laws regarding non-discrimination, including without limitation, statutory and constitutional provisions prohibiting discrimination on the basis of disability, age, race, creed, color, sex, gender identity, national origin, religion, ancestry, marital status, political beliefs and/or affiliations, or sexual orientation.

D. Public Meeting and Public Records

Logos and its Board of Directors are subject to the provisions of Oregon

Public Meetings Law, ORS 192.610 to 192. 705 and Oregon Public Records Law, ORS 192.311 to 192.478.

Logos shall submit their School Board minutes to the district within two (2) weeks after each meeting.

E. School Board

Logos shall have an elected governing Board consisting of five to nine members: up to three parents, up to two charter school staff or their family members, three to eight members of business community, and the administrator of the school. LPCS recognizes the potential conflict of interest that exists with school employees on the governing board. However this potential conflict must be weighed against the importance of having all stakeholders involved in governance of the school.

The school bylaws will also permit the superintendent of Medford to assign a designee to serve on the charter school's governing board as a non-voting board member.

The LPCS board will comply with all policies and regulations of the Oregon Ethics Commission and will be retrained periodically on those regulations.

F. Website

Logos shall maintain a website with important information such as contact information, complaint policy, and a link to the sponsoring district's website.

G. Operational Powers

Subject to the conditions and provisions of this contract, Logos through its Board of Directors shall be fiscally responsible for its own operations within limitations of any funding provided by the District and other revenues derived by Logos consistent with law.

- (i) Logos shall have the authority to exercise independently, also consistent with federal and state law, all powers granted to nonprofit corporations and charter schools so long as such powers are not inconsistent with the terms of this contract, including without limitations the following powers (and including such other powers as provided for elsewhere in this contract): making all personnel decisions, including hiring, firing and discipline of all teachers, supervisors, and staff; contract for goods and services necessary for the operation of Logos; prepare a budget; procure insurance and necessary bonds; lease facilities for school purposes; purchase, lease or rent furniture, equipment and supplies; retain fees collected from

students in accordance with law; organize and carry out fund-raising efforts; and accept and expend gifts, donations or grants of any kind in accordance with such conditions prescribed by the donors as are consistent with law and not contrary to any of the terms of this contract.

- (ii) Notwithstanding the above, unless purchased through the District, contractual services and purchases of supplies, materials and equipment purchased with public funds in excess of \$5,000.00 shall be procured through a system of competitive bidding as required by state and federal law.

H. Third Party Contracts

Except as may otherwise be prohibited by the terms of this contract or Oregon law, Logos may contract with third parties to provide personnel and services necessary for or incidental to the operation of Logos, including but not limited to the recruiting, hiring, and compensation of any such personnel, so long as:

- (i) Logos' governing board does not control the operations of the third party;
- (ii) Logos at all times maintains a right of control and final decision making authority over those decisions that involve the governmental function of providing a public education, including but not limited to the authority to develop and modify its curriculum, to ensure that instruction is consistent with the approved curriculum, to make decisions affecting its students' access to education, including but not limited to disciplinary decisions, and to make decisions regarding the hiring, firing and discipline of all teachers, supervisors and staff providing services to Logos;
- (iii) Logos at all times maintains and provides procedural safeguards to affected members of the public in relation to those aspects of Logos' operations that constitute the governmental function of providing a public education, including but not limited to procedures to allow persons to seek redress from Logos as a result of the contractor's actions; and
- (iv) As provided in Section 10.E of this contract, Logos agrees to defend, indemnify and hold the District free and harmless from any and all claims and/or liability of any kind or nature arising out of any such third party contracts entered into by Logos.

I. Annual Report and Review

- (i) By January 1 of each year, Logos shall prepare and submit to the District and the State Board of Education the following:
 - a. An annual report that reflects the school's performance, progress, and ongoing improvement efforts. As part of this process, Logos engages in a continuous school improvement cycle through its participation in the Oregon Department of Education's Integration Grant, which is submitted through the District. The Integration Grant process includes the development, implementation, and monitoring of plans that incorporate baseline data, improvement goals, action steps, and progress measures in alignment with ODE requirements. These plans and associated data are maintained and reported through the Integration Grant framework and are accessible through that process. Through the Integration Grant agreement and submission, the District has access to all relevant data and reporting related to Logos' school improvement efforts. Logos uses this process to guide decision-making and improve student outcomes, and progress is reviewed annually as part of the District's annual review of the school.
 - b. The audit and financial statements required under Section 6 paragraph C of this contract, including proof of insurance;
- (ii) District board and staff members may visit the Logos charter site at any time during operating hours. Pursuant to state law (currently ORS 338.095), the District or its designee will, at least annually, visit the Logos site and review Logos' compliance with the terms and provisions of this charter.

J. Term

The terms of this contract will become effective on July 1, 2026, assuming all conditions precedent enumerated in Section 2 of this contract have been met, and will last for a period of ten (10) school years until June 30, 2036, subject to the provisions of Section 8.K, below. The term of this Charter Agreement shall be ten (10) years from the effective date of approval. Beginning in year five (5) of the agreement and continuing through year ten (10), either party may request to reopen negotiations regarding the terms of this Charter Agreement. To initiate such negotiations, the requesting party must provide written notice to the other party by email no later than December 1 of the applicable year. Upon receipt of such notice, the parties agree to begin the standard charter renewal process. Unless otherwise agreed in writing by both parties, all existing terms of this Charter Agreement shall remain in effect during the charter renewal process.

K. Termination

- (i) To the extent allowed by ORS Chapter 338 the District may revoke the charter and terminate this contract on any of the following grounds:
 - (a) Violation of or failure to meet and sustain any terms of this contract or ORS Chapter 338.
 - (b) Failure to meet the requirements for student performance stated in Section 5 of this contract.
 - (c) Failure to correct any violation of a federal or state law that is described in ORS 338.115.
 - (d) Failure to maintain insurance as described in Section 10 of this contract.
 - (e) Failure to maintain financial stability.
 - (f) Failure to maintain, for two or more consecutive years, a sound financial management system.
- (ii) The District shall provide sixty (60) days prior written notice of its intent to terminate the charter agreement. Logos may appeal the District's decision to terminate the charter agreement directly to the District's Board and request a hearing prior to the expiration of the 60-day notice period. Logos may respond to the allegations in the District's written notification by offering documentary evidence and oral argument. The District bears the burden of proving the allegations in the written notification by a preponderance of the evidence. Logos has the burden of proof for any affirmative defense to the allegations by a preponderance of the evidence. The District Board's decision may only be appealed to the State Board of Education according to ORS 338.105. Until the effective date of termination of this contract, as determined by the District, the District shall continue to make the funding payments under Section 6 of this contract to Logos.
- (iii) Logos shall only terminate this charter at the end of a semester. Logos shall notify the District in writing at least one hundred eighty (180) calendar days prior to the proposed effective date of termination, dissolution or closure of Logos.
- (iv) Notwithstanding anything to the contrary in Sections 8.K(i)-(iii), above, the District may terminate the charter immediately and close the school if Logos is endangering the health or safety of the students enrolled at Logos.

- (v) In the event of termination of Logos as a public charter school, all assets purchased with public funds given to Logos by the District in accordance with this contract shall be given to the State Board of Education in accordance with ORS 338.105(6). Logos is entitled to any asset that was purchased with non-public funds, or was purchased with public funds if less than \$500.00 of public funds were expended on the asset, at the time Logos ceases to operate as a public charter school, and to any other asset that Logos has acquired through the expenditure of non-public funds as described in Section 8, paragraph M of this contract.
- (vi) In the event of termination of Logos as a public charter school, Logos will aid families with paperwork and information so they may have as smooth of a transition as possible to another school of their choice or to register with the Southern Oregon Education Services District to return to homeschooling. Logos or MSD may conduct exit interviews with staff, parents, board, or administration to facilitate the transition for families.
- (vii) As provided in ORS 338.105(6), upon termination of this contract for any reason or upon the dissolution of Logos, all student education records of Logos shall be delivered to the administrative office of the District.

L. Dissolution

In the event Logos should cease operations as a public charter school for whatever reasons, including but not limited to, the non-renewal or revocation of its charter, or dissolution of the nonprofit corporation, it is agreed that Logos' legal authority to operate as a private or non-chartered public school shall not be abridged. However the assets of Logos that were purchased with public funds given to Logos by the District under this contract, or by any other public entity, shall be distributed in the same manner as described in Section 8, paragraph K of this contract.

M. Property Inventory Control

- (i) Logos shall maintain records of purchase orders for all assets over \$1000.00. These records shall indicate whether the assets were purchased with public funds, or non-public funds. Logos shall provide the District with a copy of this purchase order record no later than July 15 of each year that Logos operates as a public charter school in the District. For purposes of this section public funds shall include any and all funds distributed to Logos:

- (a) By the District, pursuant to ORS 338.155 and ORS 338.165;
 - (b) By the Oregon Department of Education, including any and all federal grants for which Logos may apply and;
 - (c) By any agency, division or branch of the United States Government, or any entity created by an agency, division or branch of the United States Government.
- (ii) Any asset which was purchased by Logos with public funds in excess of \$500.00 shall be given to the State Board of Education upon termination pursuant to ORS 338.105(6). Logos may retain any asset which was purchased with non-public funds upon termination. If Logos does not maintain records of purchase orders for all assets, or cannot provide records showing that an asset was purchased with non-public funds, then it shall be assumed that the asset was purchased with public funds, and upon termination the asset in question shall be given to the State Board of Education pursuant to ORS 338.105(6).
- (iii) The parties acknowledge that assets costing less than \$500.00 may have little value at the time of any termination of this contract. Therefore, Logos will not be held responsible for identifying assets costing less than \$500.00 and purchased with public funds, but the District does not waive any rights that the State Board of Education may have to enforce ORS 338.105(6).

9. Employment Matters

Logos shall be the employer of all employees of Logos. Employees of Logos shall not be considered, for any purpose, employees of the District. Employees of Logos shall not be entitled to, or be covered by, any collective bargaining agreement that the District has entered into with any of its respective employees or their exclusive representative for purposes of collective bargaining.

- A. Criminal Background checks, Sexual Conduct Clearance, and Pre-employment Drug Screen.
 - (i) Logos shall comply with ORS 181A.195, 326.603, 326.607, and 342.223 relating to criminal records checks. Logos shall not knowingly employ an individual for whom a criminal background investigation has not been initiated or who has been convicted of an offense that would preclude that individual from working in a public school in Oregon.
 - (ii) Logos shall comply with ORS 339.374 relating to child abuse and

sexual conduct clearance.

- (iii) Logos shall not employ an individual who has not successfully completed a pre-employment drug screen.
- (iv) No later than ten (10) business days prior to the start of each school each year, Logos shall provide to the District a list containing the following employee information:
 - 1. Employee names and job positions
 - 2. Proof of valid Oregon teaching license/Charter School Registry with an endorsement appropriate to their position.
 - 3. Date of criminal background investigation results.
 - 4. Date of drug screen results
 - 5. Date of child abuse and sexual conduct mailing and receipt of information.
 - 6. Evidence of Highly Qualified status

B. Teacher and Administrator Licensure/Registration Requirements.

- (i) Pursuant to ORS 338.135(7), at least one-half of the total full-time equivalent (FTE) teaching and administrative staff at Logos shall be licensed by TSPC pursuant to ORS 342.125. Any teaching or administrative staff not licensed by the Oregon Teacher Standards and Practices Commission (TSPC) will register with TSPC in accordance with ORS 338.135(7)(a)-(c) and OAR 584-023-0005 prior to beginning work.
- (ii) All licensed and registered elementary and secondary teachers must hold a bachelor's degree and must meet the highly qualified teacher definition. Each educator must demonstrate subject matter competency based on TSPC and state requirements.
- (iii) No Logos licensed and administrative staff may serve students until the verification of their highly qualified status has been submitted to the District and approved.

C. Logos Responsibilities

- (i) Logos shall have a licensed/negotiated building level administrator or his/her designee on-site.

- (ii) The administrator for Logos shall not be assigned to multiple charter schools, but shall be the administrator solely for Logos.
- (iii) Logos will make final decisions regarding hiring (other than for services contracted with District for, such as ELL/SPED), compensation, evaluation, promotion, discipline, and termination of employees working at Logos. Logos will be responsible for the supervision and evaluation of the teaching staff within Logos. These services may be a contracted service.
- (iv) Employees shall be paid through the payroll department of Logos.
- (v) Employees of Logos will receive benefits in compliance with their respective agreements.
- (vi) Logos shall comply with all applicable federal and state laws concerning employee welfare, safety, and health issues.
- (vii) Logos shall be responsible for establishing and maintaining personnel records for employees working at Logos in compliance with all applicable federal and state laws concerning the maintenance, retention and disclosure of employee records.
- (viii) Logos shall ensure that its own employees comply with all applicable federal and state law relating to employee conduct as stated in the staff Handbook. Logos board of directors reserves the right to establish additional standards for conduct as they see fit.
- (ix) Professional development will be at the discretion of Logos.

10. Insurance and Legal Liabilities

A. Insurance

- (i) Logos shall, at its own expense, secure, retain, and provide proof of insurance consistent with the amounts set forth in Medford School District policy LBE and LBE-AR as of the time this contract is executed, or as may be revised during the term of this contract: commercial and general liability insurance; errors and omissions insurance; directors' and officers' liability insurance; automobile liability insurance; workers' compensation insurance; and property insurance.
- (ii) No later than August of each year, and at any time thereafter upon request of the District, Logos shall provide the District with certificates of insurance or other satisfactory proof evidencing coverage in the

types and amounts set forth herein. All such insurance policies shall contain a provision requiring notice to the District, at least 30 days in advance, of any material change, non-renewal or termination to the attention of the Superintendent of the District.

B. Legal Liabilities

- (i) Pursuant to ORS 338.115, in addition to any statute or rule that is listed in this charter, the following federal and state laws apply to Logos and shall be observed by Logos where applicable:
 - (a) Federal law.
 - (b) ORS 192.311 to 192.478 (Public Records Law).
 - (c) ORS 192.610 to 192.705 (Public Meetings Law).
 - (d) ORS 297.405 to 297.555 and 297.990 (Municipal Financial Audit Law).
 - (e) ORS 326.561, 326.565, and 326.575 (student records).
 - (f) ORS 181A.195, 326.603, 326.607, and 342.223 (criminal records checks).
 - (g) ORS 337.150 (textbooks).
 - (h) ORS 339.141, 339.147 and 339.155 (tuition and fees).
 - (i) ORS 332.505(2), 659.850, 659.855 and 659.860 (discrimination).
 - (j) ORS 30.260 to 30.300 (tort claims).
 - (k) Health and safety statutes and rules.
 - (l) The statewide assessment system developed by the Oregon Department of Education under ORS 329.485(2).
 - (m) ORS 329.045 (academic content areas).
 - (n) ORS 329.451 (high school diploma, modified diploma, extended diploma and certificate of attendance).
 - (o) Any statute or rule that establishes requirements for instructional time provided by a school each day or during a year.

- (p) ORS 339.250 (9) (prohibition on infliction of corporal punishment).
 - (q) ORS 339.326 (notice concerning students subject to juvenile court petitions).
 - (r) ORS 339.119 (consideration for educational services).
 - (s) ORS Chapter 338.
 - (t) ORS Chapter 657 (Employment Department Law).
 - (u) Any administrative rule adopted by the Oregon state Board of Education or the Oregon Teacher Standards and Practices Commission (TSPC) regarding public charter schools.
 - (v) ORS 339.370 to 339.400 (reporting of sexual conduct and child abuse and training on prevention and identification of sexual conduct and child abuse).
 - (w) ORS 279A, 279B and 279C (public contracting).
 - (x) ORS 329.546 (physical education).
 - (y) ORS 336.840 (use of personal electronic devices).
 - (z) ORS 342.856 (core teaching standards).
 - (aa) Statutes and rules that expressly apply to public charter schools.
 - (bb) Statutes and rules that apply to a special government body, as defined in ORS 174.117, or a public body, as defined in ORS 174.109.
- (ii) Logos will publish its policies on its website at <https://logoscharter.com/adopted-school-board-policies/>

C. Waiver

Logos may apply to the State Board of Education for a waiver consistent with ORS 338.025. Logos shall notify the District in writing at least thirty (30) days prior to requesting a waiver and invite district comment on the waiver request. The written notification shall state the waiver being sought, the reasons for the waiver and how the waiver will enhance the educational program at Logos.

D. Full Faith and Credit

Logos agrees that it shall not extend the full faith and credit of the District to any third person or entity. Logos acknowledges and agrees that it has no authority to enter into a contract that would bind the District. Logos' governing Board has the authority to approve contracts to which Logos is a party, subject to the requirements and limitations of the Oregon Constitution, state law and provisions of this contract.

E. Indemnification

- (i) To the extent not covered by insurance or otherwise barred by the Oregon Tort Claims Act in ORS Chapter 30, Logos agrees to defend, indemnify and hold the District, its Board, agents and employees harmless from any and all liability, claims, and demands on account of injury, loss or damage, including, without limitation, claims arising from (1) the possession, occupancy or use by Logos of property of Logos or its landlord, its faculty, employees, students, patrons, guests or agents; (2) civil rights violations, bodily injury, personal injury, sickness, disease, death, property loss or damage or any other losses of any kind whatsoever which arise out of the acts or omissions of Logos. This indemnification shall not apply to any liability, claims, or demands resulting solely from the wrongful act or omission of any District Board member, officer or employee. This indemnification shall also not apply to any damages incurred regarding any act or omission of Logos or Logos' Board that is later deemed to be required by law or this contract. Logos agrees to indemnify, hold harmless and defend the District from all contract claims in which Logos has obligated the District without the District's prior written approval. The foregoing provision shall not be deemed a relinquishment or waiver of any kind of applicable limitations of liability provided in the Oregon Tort Claims Act.
- (ii) To the extent not covered by insurance or otherwise barred by the Oregon Tort Claims Act in ORS Chapter 30, the District agrees to defend, indemnify and hold Logos, its Board, agents and employees harmless from all liability, claims, or demands on account of injury, loss or damage, including, without limitation, claims arising from civil rights violations, bodily injury, personal injury, sickness, disease, death, property loss or damage or any other losses of any kind whatsoever which arise out of the administration of this contract or are in any manner connected with the District's operation. This indemnification shall not apply to any liability, claims, or demands resulting from the negligence or wrongful act or omission of any Logos Board member, officer or employee. This indemnification shall not apply to any liability, claims, or demands resulting from the negligence

or wrongful act of any District employee working at Logos whose negligent or wrongful act or omission is caused in whole or in part, or directed by Logos. This indemnification shall not apply to any damages incurred regarding any act or omission of the District or District Board that is later determined to be required by law or this contract. The foregoing provision shall not be deemed a relinquishment or waiver of any kind of applicable limitations of liability provided in the Oregon Tort Claims Act.

- (iii) This indemnification, defense and hold harmless obligation on behalf of Logos and the District shall survive the termination of this contract. Any indemnified party shall have the right, at its own expense, to participate in the defense of any suit, without relieving the indemnifying party of any of its obligations hereunder.

F. District Disclaimer of Liability

The parties to this contract expressly acknowledge that Logos is not operating as an agent, or under the direction and control, of the District Board except as required by law or this contract, and that the District Board assumes no liability for any loss or injury resulting from

- (i) the acts or omissions of Logos, its governing Board, trustees, agents or employees;
- (ii) the use and occupancy of any building occupied by Logos or any matter in connection with the condition of such building; or
- (iii) any debt or contractual obligation incurred by Logos.

G. ADA/§504 Obligations

Logos acknowledges that it is legally responsible to comply with Section 504 of the Rehabilitation Act of 1973, the Americans with Disabilities Act of 1990 and ORS Chapter 659 with respect to its students, staff and patrons. Logos shall indemnify and hold harmless the District from all claims under these statutes.

H. Transportation

In accordance with ORS 338.145, Logos shall be responsible for providing transportation to students who reside within the school district and who attend Logos.

Logos students may obtain transportation through the student's parent/guardian, public transportation or existing public school bus lines. The

District shall not be obligated to alter existing bus routes or add bus routes for purposes of providing transportation to Logos' students. Subject to availability of space, a District bus may stop at Logos' facility to drop-off and pick-up Logos students, if Logos' facility is on a designated District bus route. The District will provide transportation to Logos students along existing public school bus lines within the District, if space is available.

11. Renewal of Contract

As provided in ORS 338.065, any renewal of this contract shall follow the process set forth in this section.

- A. No earlier than 210 days prior to the expiration of the term of this charter, and no later than 180 days before the expiration of the term of this charter, Logos may request, in writing, that this contract be renewed. Logos' written request shall indicate which terms, if any, Logos would propose to change from the current contract. Logos shall also state why it believes the current terms need to be changed in a new contract.
- B. Within fifteen (15) days of receiving the written request from Logos, the District shall indicate in writing what additional information, if any, it will need to make its decision to renew the contract. The District shall also indicate whether the proposed changes suggested by Logos are acceptable to the District.
- C. Within fifteen (15) days of receiving the District request for additional information Logos shall provide the requested additional information to the District.
- D. Within 45 days after receiving a written renewal request from Logos, the District shall hold a public hearing regarding the request for renewal.
- E. Within 10 days after the public hearing, the District shall notify Logos of the District's intent about the renewal of the charter.
- F. Within twenty (20) days after the public hearing, the District shall approve the renewal of the charter or state in writing the reasons for denying the renewal of the charter. The District will base the charter renewal decision on a good faith evaluation of whether Logos is: (a) in compliance with ORS Chapter 338 and all other applicable state and federal laws; (b) in compliance with the terms of this contract; (c) meeting or working toward meeting the student performance goals and agreements specified in Section 5 of this contract and in any of the attachments incorporated herein; (d) fiscally stable and has used a sound financial management system, as well as an absence of audit findings of material misstatements in the audit report; and (e) otherwise in compliance with any renewal criteria set forth herein. The District shall base

its renewal evaluation primarily on a review of Logos' annual performance reports, annual audit of accounts and annual site visit and review, as well as any other information mutually agreed upon by the boards of Logos and the District.

- G. If the District determines that it will renew the contract, the two parties shall meet and negotiate a contract. It shall be the goal of the two parties to complete negotiation of the contract within ninety (90) days of the date the District provides notice to Logos that it will renew the contract. If it is not practically possible to complete the negotiation within ninety (90) days, the parties shall work in good faith, with all due diligence, to complete negotiation of the contract as quickly as possible.
- H. The District may make the renewal of this contract conditional upon the following factor(s):
 - (i) Logos remaining in compliance with all provisions of this contract for the remainder of the school year;
 - (ii) Logos remaining in compliance with all federal law governing public charter schools for the remainder of the school year;
 - (iii) Logos remaining in compliance with all state law governing public charter schools for the remainder of the school year
- I. If the District determines that it will not renew the contract, then Logos' board may address the reasons stated by the District and any remedial measures suggested by the District and submit a revised request for contract renewal to the District. A revised request must be submitted within fifteen (15) days of the notice of contract non-renewal. The District will then reconsider the renewal request and notify Logos of its decision within fifteen (15) days of receiving the revised request.
- J. If the District determines that it will not renew the contract, then Logos shall cease to be a charter school sponsored by the District on June 30, 2031; however, Logos shall retain its right to challenge and appeal the District's nonrenewal in accordance with ORS 338.065(6).
- K. Pursuant to ORS 338.065(5)(h), upon mutual consent at any time during the renewal process, the District and Logos may agree to a renewal process timeline other than that outlined in this Section 11.

12. Miscellaneous Provisions

- A. Entire Agreement

This contract, including the Exhibits and other documents incorporated by reference herein, contains all terms, conditions and provisions hereof and the entire understanding and all representations of understandings and discussions of the parties relating thereto, and all prior representations, understandings and discussions are merged herein and superseded and canceled by this contract.

B. Governing Law

This contract shall be governed by, subject to, and construed under the laws of the State of Oregon without regard to its conflict of law provisions. The parties intend that where this contract references federal or state law, if the law changes or new laws, rules, regulations or statutes are enacted that may affect any of the terms of this contract, the parties shall review the affected terms of this contract and conform it accordingly.

C. Assignment

Logos shall not, under any circumstances, assign, delegate, or contract with any entity to provide the educational program described in this contract. It is expressly understood that the charter granted by this contract to operate the educational program runs solely and exclusively to Logos.

D. Terms and Conditions of Application

The parties to this contract agree that the application for a charter submitted by Logos, the terms of which are incorporated by reference except as amended by any specific terms of this contract, sets forth the overall goals, standards and general operational policies of Logos.

(As of the July 1, 2016 contract, Logos and the District combined the relevant aspects of the original application into the contract. Any part of the application not added to this contract is no longer required.)

E. Conflict between Application and Contract

The parties agree and acknowledge that should there be a conflict between any provision of this contract and the application submitted to the District by Logos, the contract provision(s) shall supersede any provision contained in the application.

As of the July 1, 2016 contract, Logos and the District combined the relevant aspects of the original application into the contract. Any part of the application not added to this contract is no longer required.

F. District Liaison

The District shall designate, for purposes of this contract, the District Superintendent, or his/her designee, as the official District liaison between the District and Logos.

G. Amendment

This contract may be modified or amended only by written agreement between Logos and the District. The parties agree to modify or amend this contract in order to conform to any new and/or changed laws applicable to charter schools.

H. Notice

Any notice required, or permitted, under this contract, shall be in writing and shall be effective upon personal delivery (subject to verification of service or acknowledgment of receipt) or three (3) business days after mailing when sent by certified mail, postage prepaid, to the party indicated in Section 12 J of this document.

I. Definition of Business Day

For purpose of this contract, "business day" means a day in which the District administrative offices are open. "Business day" does not include Saturdays, Sundays, official state holidays listed in ORS 336.010, federal holidays, any day(s) in which the administrative office is closed due to inclement weather or any day that the District administrative office is closed due to action taken by, or ordered to be closed by, the District Board of Directors or their designee, any instrumentality of the City of Medford, any instrumentality of Jackson County, the State of Oregon or federal government.

J. Address of Parties for Purpose of Written Notice

The following addresses are the addresses to be used when sending a written notice required by law or this contract:

Medford School District
Attn. Superintendent [Jeanne Grazioli](#)
815 S. Oakdale
Medford, Oregon 97501

Logos
Attn: Administrator Sheryl Zimmerer
1203 N. Ross Lane
Medford, Oregon 97501

Should these addresses change; the parties agree to notify the other party within ten (10) calendar days of the address changing.

K. No Waiver

The parties agree that no assent, expressed or implied, to any breach by either of them of any one or more of the covenants and agreements expressed herein shall be deemed or to be taken to constitute a waiver of any succeeding or other breach.

L. Dispute Resolution

The intent of this dispute resolution process is to (1) resolve disputes within the school pursuant to the school's policies, (2) minimize the oversight burden on the District, (3) ensure a fair and timely resolution to disputes, and (4) frame a charter oversight and renewal process and timeline so as to avoid disputes regarding oversight and renewal matters.

The District and Logos agree to work together to accomplish all tasks necessary to fully implement this charter, including the submission of any necessary and duly-prepared waiver requests to the State Board of Education.

Dispute Resolution Process: The staff, the Governing Board of Logos, and the District School Board agree to attempt to resolve all disputes regarding this Charter or other issues which may arise regarding Logos pursuant to the terms of this section in a timely, good-faith fashion. Both shall refrain from public commentary regarding any disputes until the matter has progressed through the dispute process.

In the event that Logos and the District have disputes regarding the terms of this charter or any other issue regarding the relationship between Logos and the District, both parties agree to first frame the issue in written form and provide it to the other party as indicated in 12 J of this document. The Chair of the Governing Board of Logos and the Superintendent of the District agree to meet informally and attempt to resolve the dispute. If this joint meeting fails to resolve the dispute, both parties agree to jointly identify a neutral, third party mediator. The format of the mediation session shall be developed jointly by the superintendent and the chair and shall incorporate informal rules of evidence and procedure unless both parties agree otherwise. The findings or recommendations of the mediator shall be non-binding, unless the governing boards of Logos and the District jointly agree to bind themselves. Logos may appeal to the State Board of Education concerning those matters within its jurisdiction under ORS Chapter 338.

Disputes arising from within Logos, including all disputes among and between students, staff, parents, volunteers, advisors, partner organizations and the Governing Board of Logos, shall be resolved pursuant to policies and processes developed by Logos.

The District shall not intervene in any such internal disputes without the consent of the Board of Directors of Logos and shall refer any complaints or reports regarding such disputes to the Logos Board for resolution. The District agrees not to intervene or become involved in the dispute unless the dispute has given the District reasonable cause to believe that a violation of this charter or related laws or agreements has occurred, or unless the Governing Board of Logos has requested the District to intervene in the dispute.

M. Severability

If any provision of this contract is determined to be unenforceable or invalid for any reason, the remainder of this contract shall remain in effect, unless otherwise terminated by one or both of the parties in accordance with the terms of this contract.

N. Delegation

The parties agree and acknowledge that with regard to this charter agreement between the District and Logos, the functions and powers of the District Board may be exercised by the District Liaison, provided that any ultimate decision regarding renewal, non-renewal or revocation of this contract be made only by the District Board.

O. Prior Actions

It is expressly agreed and understood that as a condition precedent to this contract becoming effective on the effective date specified above in Section 2, Logos shall have taken, completed and satisfied on or before the date specified herein, any action or obligation which is required to be completed before such effective date, and failure to do so shall constitute grounds for the District to declare this contract null and void.

P. Attorney Fees

If any suit, action or arbitration is commenced or instituted to interpret or enforce the terms of this contract, to exercise any remedy on account of a default, or otherwise relating to the provisions of this contract, the prevailing party or non-defaulting party shall be entitled to recover from the losing or defaulting party its reasonable attorney fees and costs, in addition to all other

sums provided by law, at trials or arbitration. Such sums shall be determined by the court or arbitrator.

Q. Exhibits

Exhibits A, B, C, D, E, F, G, H, and I are hereby incorporated by reference as if the same were fully set forth herein.

R. Logos Authority to Enter Into Contract

Logos expressly affirms that the signatories on its behalf who sign below have the authority to enter into this contract on behalf of Logos and that the Board of Directors of Logos has duly approved this contract. Logos' Board shall provide a copy of its written resolution authorizing Logos to enter into this contract to the District.

IN WITNESS WHEREOF, the parties have executed this contract effective as of the date first set forth above.

MEDFORD SCHOOL DISTRICT

LOGOS CHARTER SCHOOL

Chair,
Medford School District Board of Directors

Chair,
Logos Charter School Board of Directors

Date: _____

Date: _____

ADDENDUM:

2026-2036 OSBA MOU Between Logos and Medford School District

Memorandum of Understanding
OSBA - Logos - Medford

MEMORANDUM OF UNDERSTANDING BETWEEN
Medford School District AND Logos Public Charter School REGARDING SERVICES
PROVIDED BY THE OREGON SCHOOL BOARDS ASSOCIATION

This Memorandum of Understanding ("MOU") is between Medford School District and Logos Public Charter School, collectively referred to as "Parties." This Agreement is effective upon signature by the Parties and shall remain in effect for the duration of the current charter contract between the Parties, unless terminated as allowed in this Agreement.

RECITALS:

1. The Oregon School Boards Association ("OSBA") was incorporated as a nonprofit corporation under ORS Chapter 65 on July 1, 2018. As a result, OSBA will be prohibited from accepting dues and service fees from entities that are not political subdivisions of the state as defined under Treas Reg § 1.103-1(b) and Revenue Ruling 78-276, 1978-2 CB 256. Under these definitions, Oregon charter schools are not political subdivisions of the state.
2. Therefore, OSBA cannot offer associate memberships to charter schools or contract directly with them for services.
3. Charter schools can still access OSBA services through their sponsor, as long as the sponsor is a member of OSBA

AGREEMENT:

1. Medford School District permits Logos Public Charter School to access services through OSBA for the length of the charter contract (July 1, 2026-2036). Logos Public Charter School shall provide a fully executed copy of this MOU to OSBA.
2. When Logos Public Charter School schedules a service with OSBA, OSBA will enter into a service agreement with Medford School District and will invoice Medford School District for the service, according to the MOU.
3. Medford School District will pay the OSBA invoice, and will invoice Logos Public Charter School for the same amount.
4. Logos Public Charter School shall remit payment to Medford School District in full within thirty (30) days of the invoice.
5. Logos Public Charter School's failure to remit payment to the Medford School District in a timely manner may result in the termination of this Agreement at the discretion of Medford School District. 6. This Agreement may be terminated or amended only by written approval of both parties, except as authorized in 5 above.

SIGNED:



Logos Public Charter School Board Chair

Date: 4/13/26



Medford School District Board Chair

Date: 4/23/26

Exhibit A **Logos Renewal Request**



December 8, 2025

Medford School Board
Medford School District 549C
815 South Oakdale Avenue
Medford, OR 97501

Dear Members of the Medford School Board,

On behalf of Logos Public Charter School, I want to extend our sincere appreciation for the strong partnership we have shared with the Medford School District over the years. Together, we have built a collaborative relationship grounded in mutual respect, shared goals, and a steadfast commitment to serving the students and families of our community.

Logos has continued to thrive, growing in both quality and innovation while maintaining the continued academic and social-emotional growth of our students. Here are a few of the many successes of Logos over the last few years.

Academic Excellence

- Consistently among the highest graduation rates in Southern Oregon (97%+ in recent years). Last year our graduation rate was 98.73%
- Thousands of college credits earned annually through Rogue Community College and Southern Oregon University partnerships.
- Multiple students graduating with Associate Degrees as well as earning their high school diploma. Last year we had 13 students earn 18 Associate Degrees and 24 students earn technical certificates.
- Recognized by Cognia as Oregon's only School of Distinction for excellence in learning impact, leadership, and innovation.
- Recipient of the Building Hope Innovation Award for forward-thinking school design and community impact.
- Both our State of Jefferson middle school and high school have won SOU's State of Jefferson Scavenger Hunt, an academic competition, several times over the last several years. The high school has won the last 6 years in a row.
- Our Environmental Sciences Envirothon has won the Oregon Envirothon competition every year for the last 4 years and went on to compete internationally, earning 16th place last year across the US and international teams.

Student Opportunities and Enrichment

- Robust extracurricular offerings including Brain Bowl, Envirothon, OBOB, Clay Target Shooting, Track & Field, Cross Country, and Performing Arts.



- Active musical theater program with recent productions such as Peter Pan, High School Musical, and Hercules.
- Partnerships with local businesses and organizations for career-technical and community-based learning (e.g., welding, esthetics, phlebotomy, and nursing).
- Emphasis on personalized learning plans tailored to each student's academic and life goals.

Staff Excellence and Culture

- Named one of Oregon's 100 Best Nonprofits to Work For multiple years.
- Deep commitment to professional development, including Skyrocket coaching, Writing Revolution training, and data-driven instructional practices.
- Highly collaborative leadership team with a focus on communication, camaraderie, and continuous improvement.

Community Partnership and Leadership

- Over seven years of successful collaboration with the Medford School District administration and board.
- Regular contributor to statewide charter advocacy, including testimony and leadership in ORC3S.
- Deep partnerships with local organizations such as People's Bank, Adroit Construction, Marquess Engineering, CEC Engineering, and the Wes Howard Foundation.
- A model of fiscal transparency, compliance, and community trust among Oregon charter schools.

As we look ahead, Logos is seeking renewal of our charter for a **10-year term**. We are proud of the trust and collaboration that make such a long-term commitment possible and believe it will provide continued stability and focus for students, families, and staff alike.

In addition, we respectfully request the following adjustments as part of our renewal agreement:

- **Increase the student enrollment cap to 1,500 students from 1310**, reflecting both ongoing community demand and our proven capacity to serve students effectively. This is only 190 over 10 years. Doing this modest increase over 10 years shows our commitment to slow and purposeful growth.
- **Adjust the pass-through rate from the current 80% to 90%**, phased in at **1% increments per year** over the 10-year term. In the past the Medford School District administration has agreed that the pass through should be changed to 90% but has yet to make that change. This gradual adjustment would allow Logos to sustain high-quality programs, staff development, and student supports while continuing to align with best practices statewide.



We are proud to be part of the Medford School District family and deeply value the spirit of collaboration that has defined our relationship for so many years. We look forward to continued partnership, shared success, and open dialogue as we move through the renewal process.

Thank you for your ongoing leadership and dedication to the students of Medford.

Warm regards,

Colonel David Dotterer
Chairman of the Board
Logos Public Charter School

Exhibit B
District Response to Renewal



Todd Bloomquist, Senior Executive Director
Teaching and Learning
680 Biddle Road, Medford OR 97504
todd.bloomquist@medford.k12.or.us
ph 541-842-3626

January 8, 2026

To: Sheryl Zimmerer and David Dotterrer, Logos

From: Todd Bloomquist

Re: Response to Logos Letter of Intent to Renew

Dear Ms. Zimmerer and Colonel Dotterrer:

Thank you for your letter of intent to renew the charter contract for Logos Charter School. It is very exciting the good work your school is doing and the service it is providing to the community. I appreciate your highlights of accomplishments.

I have included a summary and initial response to each of the requests for changes below:

Logos requests to increase the enrollment cap from 1310 to 1500 students. This request will require further discussion with our Board and team.

Logos requests that passthrough dollars be increased from 80% to 90% in 1% incremental increases each year for 10 years. This request will require further discussions with our Board and team about the increased passthrough dollars to Logos.

I will be gathering the initial questions from the MSD Team and will provide them to you as soon as possible. We are also working on scheduling a time with you and Dave to meet with the MSD team, and I am happy to have follow up discussions as needed.

We value our partnership with Logos, and look forward to working with you and your board through this process.

Sincerely,

A handwritten signature in blue ink that reads 'Todd P. Bloomquist' with a stylized flourish at the end.

Todd P. Bloomquist, EdD

Exhibit C
District Office Recommendation



EXECUTIVE SUMMARY

Meeting Date:	February 19, 2026
Agenda Item:	Approval of Logos Public Charter Renewal Request
Item Type:	Action Item
Administrator:	Todd Bloomquist
Objective:	Approval of the Charter Contract Renewal Request

Background:

The Logos Public Charter School requested the District renew their charter contract on December 10, 2025. A copy of the letter is included in the Board packet.

The District responded on January 8, 2026 and notified Logos that some of the requests will require further discussion.

Both the public hearing and the recommendation for approval will be presented to the Board on February 19, 2026. Once approved to move forward with renewal, the two parties will meet, negotiate, and come to an agreement on the terms of the new charter. The full timeline for renewal can be referenced [here](#), in accordance with [OAR 581-026-0400](#).

An annual visit with Board members was conducted on January 30, 2026. A summary of the visit is included in the Board packet.

Additional Materials:

[Logos Request to Renew Charter](#)

[MSD Response Letter to Logos](#)

[Logos Annual Visit Summary](#)

Recommendation:

After reviewing Logos Charter School's annual report, student performance data, financial records, and visiting the site, we recommend that the Board approve the Logos Charter School contract renewal request and move forward with negotiating the terms of a new contract.

Suggested Motion:

"I move that the Medford School District approve the Logos Public Charter contract renewal request, and move forward with negotiating the terms of a new contract."

Exhibit D
District Board Minutes



Regular Meeting of the Board of Education

Thursday, February 19, 2026 6:00 PM

Oakdale Middle School Room 230
815 S. Oakdale Ave.
Medford, OR 97501

Board members present: Lilia Caballero (attended virtually), Kendell Ferguson, Erik Johnsen, Sandra LaNier McHenry (attended virtually), Sunny Spicer, Michael Williams, and Angela Zbikowski

A video recording of the Board meeting can be found on the district website at [this link](#). The slide presentation can be viewed by clicking on Extras listed next to the meeting at [this link](#).

1. Call to Order / Pledge of Allegiance / Roll Call

Board Chair Kendell Ferguson called the meeting to order at 6:04 PM, led the Pledge of Allegiance, and confirmed a quorum through roll call. She welcomed attendees and read the district's vision statement.

2. Agenda Adjustments and Approval

No objections were raised. The agenda was approved by unanimous consent.

3. Board Announcement

Chair Kendell Ferguson referenced the superintendent search process that began in October with the hiring of a search firm and culminated in finalist interviews conducted by the Board and stakeholder panels. She announced that the Board has extended an offer to Interim Superintendent Jeanne Grazioli for the permanent superintendent position, and that she has accepted. The Board has entered into contract negotiations with Grazioli and anticipates bringing a proposed contract forward for approval at an upcoming meeting.

Board Directors noted that the process, facilitated by McPherson & Jacobson, was thorough and equitable. They expressed confidence that the firm's guidance supported the Board in narrowing the candidate pool and selecting the right individual to lead the district.

Grazioli shared her gratitude for the opportunity, describing the process as rigorous and her service as Interim Superintendent as meaningful work. She expressed enthusiasm for the next chapter and her commitment to continuing to move the district forward.

Those in attendance extended congratulations.

4. Public Hearing for Logos Public Charter School & The Valley School of Southern Oregon

Chair Ferguson opened the public hearing. The following citizens came forward in support of renewing the Logos Public Charter School contract: Sheryl Zimmerer, Dave Dotterrer, Layla Copeland, and Patrick Rochon.

The following citizens came forward in support of renewing The Valley School of Southern Oregon contract: Tamara Johnston, Kris Von Wald and Craig Manning.

5. Close Public Hearing

The public hearing was closed at 6:25 PM.

6. Public Hearing for Exemption from Competitive Bidding Requirements and Use of the Design/Build Contractor Method of Procurement for the Oakdale Middle School and Wilson Elementary School Trusses Project

Chair Ferguson opened the public hearing. There were no requests to speak.

7. Close Public Hearing

The public hearing was closed at 6:26 PM.

8. Items for Information & Discussion

8.a. Interim Superintendent Report: Graduation Rate

Interim Superintendent Jeanne Grazioli directed the Board's attention to the graduation reports included in the packet and reviewed key data highlights. She noted that the district's 2025 graduation rate increased from 85.3% to 88.1%.

Grazioli attributed the improvement to intentionally designed systems that monitor student data and identify students who may be off track to graduate as early as possible. She commended staff for their commitment to understanding barriers, implementing targeted supports, and expanding flexible high school credit options to help students stay on track.

Reports presented included the district's eleven-year graduation trend; four- and five-year cohort data; completion rates; comparisons with top 10 districts and local districts; poverty comparison data; and top 10 district comparisons by student groups.

Board Directors asked questions and offered comments regarding changes in graduation requirements, including whether Senate Bill 744 related to essential skills had an impact on the graduation rate. They expressed appreciation to staff for their efforts in supporting student success and noted that this cohort experienced formative years during the pandemic, highlighting the resilience of the graduating class.

8.b. Board Priority: Financial Stewardship

Assistant Superintendent of Operations Brad Earl provided a state and district financial update. The most recent state revenue forecast reflected no significant changes, and as the short legislative session concludes, the district remains hopeful that no mid-biennium cuts will occur. Federal funds are expected to be received as budgeted, though future Title funding remains a concern.

District revenues are slightly below projections, while expenditures are trending lower due to unfilled positions, creating limited savings. Increased utilization of Special Education services through the ESD was noted. In preparation for potential reductions, Superintendent Grazioli has prioritized spending, frozen select positions, reduced travel, and plans to vacate the Biddle building next year, generating approximately \$250,000 in savings.

8.c. Oregon School Employees Association (OSEA) Report

OSEA President Sarah Reames thanked the Board for transparency in the superintendent search and shared challenges in special education, illustrating the daily realities faced by classified staff, including behavioral issues and student dysregulation.

She emphasized the need to restore safety and stability through Board policy, budget decisions, and accountability, highlighting priorities such as consistent training, clear behavior systems, adequate staffing, and competitive compensation. Reames stressed that stable, safe classrooms are essential for family confidence, enrollment, and overall district success.

Board Directors asked about legislative restrictions on addressing challenging behavior and progress in tracking and reporting student-to-staff incidents. They expressed appreciation for the difficult work staff face and concern about sustaining it over time. Directors showed interest in volunteering in classrooms to better understand daily staff experiences and in ensuring these experiences are consistent across sites. They emphasized the need for parent accountability, a welcoming culture for staff to share concerns, and collaborative approaches to finding solutions.

9. Citizen Comments

There were no requests to speak during citizen comments.

10. Recess

The meeting was recessed for 10 minutes.

11. Items for Information & Discussion (continued)

11.a. Education Accountability Act (Senate Bill 141)

Interim Executive Director of Teaching and Learning Todd Bloomquist provided an overview of SB 141, highlighting its five priorities—Meaningful Relationships, Reciprocal & Shared Accountability, Systems-Level Continuous Improvement, Multiple Measures that Matter, and Sufficient & Responsive Resources—and what they mean for the district. The district will establish Performance Growth Targets, select an interim assessment option (likely i-Ready), align reporting systems with state requirements, monitor student progress, and implement interventions for students not meeting targets. The plan includes 2025-26 as the planning year, 2026-27 for pilot implementation, and full implementation by 2029-30. Board Directors raised questions about student opt-out options, assessment data availability, and using i-Ready as a consistent measure.

11.b. Interdistrict Transfers Annual Approval Discussion

Grazioli reported that the district is required annually to declare the number of interdistrict student transfers both into and out of the district. She noted that approval of incoming transfer students would appear later on the consent agenda.

Board Directors expressed interest in reviewing the number of students transferring out of the district and, given ongoing enrollment declines, considering potential revisions to Board policy to limit outgoing transfers. Currently, there are no restrictions on the number of students who may leave the district.

Grazioli recommended that a small group of Board Directors meet with staff within the next week to review the existing policy and determine whether revisions should be brought forward for discussion at the March 5 work session. Directors Zbikowski, Spicer, and Williams were identified to participate in that meeting.

12. Board Action Items

12.a. Logos Public Charter School Renewal Request Approval

A motion was presented by Zbikowski and seconded by Johnsen to approve the Logos Public Charter School contract renewal request and move forward with negotiating the terms of a new contract.

Board Directors Johnsen and Williams shared positive observations while attending the Logos visit.

**Roll call vote: LaNier McHenry: Yea, Spicer: Yea, Williams: Yea, Caballero: Yea, Johnsen: Yea, Zbikowski: Yea, Ferguson: Yea
Result: Motion passed (Yea: 7, Nay: 0)**

12.b. The Valley School of Southern Oregon Renewal Request Approval

A motion was presented by Zbikowski and seconded by Johnsen to approve The Valley School of Southern Oregon contract renewal request and move forward with negotiating the terms of a new contract.

Board Directors Zbikowski, Spicer and Williams shared positive observations while attending The Valley School visit.

**Roll call vote: Spicer: Yea; Caballero: Yea, LaNier McHenry: Yea, Johnsen: Yea, Williams: Yea, Zbikowski: Yea, Ferguson: Yea
Result: Motion passed (Yea: 7, Nay: 0)**

12.c. Exemption from Competitive Bidding Requirements and Use of the Design/Build Contractor Method of Procurement Approval

Prior to a motion, Earl explained the staff recommendation to utilize the Design/Build method of procurement, which requires approval from the Local Contract Review Board (the School Board). He noted that this approach would allow the design and construction phases to be combined, streamlining the process and shortening the overall project timeline. The project would still be publicly advertised, with proposals reviewed in accordance with standard procedures.

Board Directors requested clarification on the motion language, including which sites would be covered. Additional questions were raised regarding insurance coverage, the project timeline, and the Board's role in approving the bid. A request was made for a follow-up on the number of bids submitted.

A motion was presented by Caballero and seconded by Spicer to approve Resolution #2026-1 as presented, approving and granting exemption from competitive bid requirements and authorizing the use of the Design/Build method of procurement for the Oakdale Middle School and Wilson Elementary truss projects.

**Roll call vote: Williams: Yea, Caballero: Yea, Spicer: Yea, LaNier McHenry: Yea, Johnsen: Yea, Zbikowski: Yea, Ferguson: Yea
Result: Motion passed (Yea: 7, Nay: 0)**

12.d. Southern Oregon Education Service District Local Service Plan Approval

A motion was presented by Johnsen and seconded by Zbikowski to approve the Southern Oregon Education Service District 2026-27 Local Service Plan as presented.

**Roll call vote: Johnsen: Yea, LaNier McHenry: Yea, Spicer: Yea, Caballero: Yea, Williams: Yea, Zbikowski: Yea, Ferguson: Yea
Result: Motion passed (Yea: 7, Nay: 0)**

13. Consent Agenda

The following items were presented on the consent agenda:

- Staff Assignment Report
- Interdistrict Transfers for Non-resident Students

No objections were raised. The consent agenda was approved by unanimous consent.

14. Announcements

Chair Ferguson acknowledged the next Board Work Session scheduled for March 5 at Oakdale Middle School.

15. Adjournment

With no further business, the meeting was adjourned at 7:53 PM.

Exhibit E

Logos Response to More Information on Funding Request



4/14/2026

Good Afternoon Medford School District Board of Directors,

On behalf of Logos Public Charter School, we extend our sincere appreciation for your continued partnership in serving the students and families of the Rogue Valley. Your leadership in supporting a diverse educational ecosystem, one that includes both traditional public schools and public charter options, continues to benefit our broader community in meaningful ways.

As part of our 10-year charter renewal proposal, we respectfully request your consideration of a gradual reduction in the K–8 sponsorship charge of 1% annually over the next ten years. We offer the following context to support this request and to explain why we believe this is the right time for this conversation.

We acknowledge, transparently, that Logos is currently in a stable financial position. This stability is the result of a consistently conservative and disciplined approach to fiscal management. For example, we routinely budget below our authorized enrollment cap to account for variability in student enrollment, and we take a cautious approach when projecting revenue across differing sponsorship rates. These practices are intentional and reflect our commitment to long-term financial stability and avoiding budget shortfalls.

As a K–12 public charter school in Oregon, we also operate within structural constraints that require this level of discipline. Unlike traditional districts, we do not have access to bond funding for facility construction, acquisition, or seismic upgrades. As a result, we must rely on long-term planning and reserves to meet these essential needs. Additionally, the broader legislative and political landscape surrounding charter schools continues to evolve, requiring us to maintain sufficient reserves to ensure operational continuity. Without the safety net available to traditional systems, financial instability would directly threaten our ability to serve students. At the same time, Logos operates on approximately 58% of the per-student funding received by traditional public schools, requiring us to deliver meaningful, personalized educational opportunities within significantly more limited financial resources.

While this disciplined approach has allowed us to remain stable, it has also required us to limit or defer investments that directly impact students and staff. At present, we are regularly faced with situations where students and families must limit or forgo educational opportunities—not due to lack of interest or need, but due to available funding. For many of our students, this can mean choosing between accessing tutoring support, participating in career pathway experiences, or engaging in enrichment opportunities that could meaningfully shape their future. These are not abstract tradeoffs; these are real decisions families in our community are making today.

Approval of this sponsorship rate reduction would allow us to make meaningful, targeted investments in the following priorities:

Students:

First and foremost, our model is built on student and family choice. We are committed to



allocating no less than 50% of any additional funds generated through this request directly toward expanding educational opportunities for students. This includes increased access to our community partner program, through which students receive instruction, tutoring, and enrichment from approved local providers, as well as expanded pathways programming. These opportunities not only personalize education but also deepen students' connection to the Rogue Valley community and support their development as engaged, contributing citizens.

Staff:

Equally important is our investment in the people who serve our students. While we have made substantial progress toward offering competitive salaries, healthcare costs for employees with dependents have risen dramatically, often reaching 400–500% of the cost experienced by employees within Medford School District. This disparity is largely driven by the smaller size of our risk pool. Addressing this challenge is essential not only for staff well-being, but also for long-term retention. We believe strongly that educators should not be forced to choose between remaining in the profession they are passionate about and securing affordable healthcare for their families.

We also recognize that many of the students we serve have not found success in traditional settings and come to Logos seeking a different path. Through this model, they are not only re-engaging in their education, but in many cases thriving. Expanding access to the supports and opportunities that make this possible will only strengthen outcomes for students across our shared community.

We remain deeply committed to being a positive and contributing partner within the Medford School District community. Logos has consistently demonstrated strong academic outcomes, meaningful student engagement, and a model that elevates student voice and community connection. We are proud of the role we play in enhancing the district's overall reputation and in providing families with high-quality public education options.

In considering this request, we respectfully ask that the conversation extend beyond our current financial position. Rather than asking whether Logos is "doing fine," we encourage a broader question: *What more could be accomplished for students, families, and the community if additional resources were directed toward this model?* This request is not rooted in need alone, but in opportunity, an opportunity to expand what is possible for students who have already demonstrated what they can achieve when given access, flexibility, and support.

We believe our track record demonstrates that when entrusted with opportunity, we deliver meaningful results. We are asking you to partner with us in expanding that opportunity for the students and families we collectively serve.

Thank you for your time, your leadership, and your continued partnership.

Sincerely,

Logos Public Charter School Administration and Board of Directors

Exhibit F
Logos Mission, Vision, and Purpose

Mission Statement

Personalized Learning is described by the Association of Personalized Learning Services as including the key elements of parent involvement, small class sizes, collaboration between teacher, parent, student and the school; ongoing teacher training flexible learning in multiple environments, including home learning support; flexible curricular choices; multiple assessment tools; technology and varied learning pace. The mission of LPCS is to offer a performance and standards-based, personalized learning program in Oregon to students in grades K-12. LPCS will provide academic excellence through an individualized education, and promote a partnership between families, the community and public education. In high school, this partnership will be expanded to include the business community, in that both academic and skills will be stressed. Students will have an opportunity to develop workplace skills and enhance their organizational, interpersonal, and time management abilities while ensuring a smoother transition to college and the workplace.

Vision:

To inspire a love for learning that produces a lifelong learner.

Logos Purpose Statement:

The purpose of Logos Public Charter School is to graduate critical thinkers who can effectively communicate in the 21st century. Logos facilitates a personalized learning program through a collaborative partnership among the student, family, teacher, school, and community.

Exhibit G **Philosophical Approach**

Logos Public Charter School is founded on the core principles of personalized learning, strong partnerships with families, and meaningful collaboration with the business and broader community. At LPCS, education is intentionally designed to meet the unique needs, interests, and learning styles of each student, ensuring that every learner has access to a high-quality, individualized educational experience.

Central to this model is the assignment of a licensed or registered Educational Specialist (ES) who works closely with each student and family. The ES meets regularly with students to guide learning, monitor progress, and adjust instruction as needed. Students also benefit from access to a team of highly qualified staff and a wide range of educational resources within a “classroom without walls” approach that extends learning beyond traditional settings.

LPCS is a school of choice open to all students who would benefit from an individualized approach to education, with intentional outreach to at-risk and high-risk youth, as well as students currently engaged in home-based education. The school’s vision, “Personalized learning that maximizes parent, community, and academic resources for excellence in education,” is reflected in every aspect of its program.

Each student is supported through a Personalized Learning Plan, which aligns curriculum, instruction, and assessment to individual goals and needs. Instructional options are diverse and flexible, including traditional classroom experiences, independent study, small group instruction, homeschool partnerships, project-based learning, service learning, internships, and dual enrollment opportunities on college campuses. This variety ensures that students can engage in learning in ways that are most meaningful and effective for them.

Family partnership is a cornerstone of the LPCS model. Parents are active participants in their child’s education, working collaboratively with the Educational Specialist to support learning. Weekly communication and regular meetings ensure that progress is monitored,

adjustments are made, and students remain on track to meet academic standards.

In addition to strong family partnerships, LPCS emphasizes connections with the business community. Through service learning and mentorships students develop essential life and career skills such as leadership, problem-solving, critical thinking, teamwork, and ethical decision-making. By integrating real-world experiences into education, LPCS prepares students to become productive, engaged citizens.

The school is committed to supporting all learners by providing both targeted interventions in core academic areas for students who need additional support and advanced opportunities for those with exceptional abilities. Upon enrollment, students are assessed in key areas such as reading and math to determine academic levels and identify interests. This data informs the development of each student's Personalized Learning Plan and helps students build on their strengths while addressing areas for growth.

Student progress is continuously monitored through a variety of measures, including ongoing formative assessments, work samples, and standardized tools as well as state-required assessments. This data-driven approach ensures that instruction remains responsive and effective.

At its foundation, LPCS believes that learning is most successful when teaching is tailored to the individual. By incorporating multiple instructional strategies, honoring different learning styles, and providing meaningful choices in how students engage and demonstrate their learning, LPCS creates an environment where all students can thrive.

Exhibit H
Articles of Incorporation

Articles Of Incorporation Nonprofit
Public Benefit Corporation-Charter
School

Registry Number: 655424-91

FILED

JAN 07 2010

OREGON
SECRETARY OF STATE

ARTICLES OF INCORPORATION OF
LOGOS CHARTER SCHOOL

ARTICLE I. NAME

The name of the corporation is Logos Charter School.

ARTICLE II. REGISTERED AGENT

The registered agent of the corporation is John VonDoloski.

ARTICLE III. ADDRESS OF THE REGISTERED AGENT

The address for the registered agent is:

John VolDoloski
1782 Key Drive Medford, Oregon 97501-3941

ARTICLE IV. ADDRESS FOR MAILING NOTICE

The address for mailing notice is:

Logos Charter School
1782 Key Drive Medford, Oregon 97501-3941

ARTICLE V. OPTIONAL PROVISIONS

Federal Tax-Exempt Provisions

5.1 Exclusive Purpose

The corporation is organized exclusively for educational purposes—specifically to provide a personalized public educational program to students in grades K-12 and as such shall qualify under section 501 (c) (3) of the Internal Revenue Code, or the corresponding section of any future tax code.

Limitations on Distributions

ARTICLES OF INCORPORATION 1/7/10

Logos Charter School

1

No part of the net earnings of the corporation shall inure to the benefit of, or be distributable to, its directors, officers, or other private persons, except that the corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in Article 5.1.

5.2 Limitations on Political Activity

No substantial part of the activities of the corporation shall consist of carrying on propaganda, or otherwise attempting to influence legislation. The corporation shall not participate in or intervene (including the publishing or distribution of statements) for any political campaign on behalf of, or in opposition to, any candidate for public office.

5.3 Statutory Compliance

Notwithstanding any other provision of these Articles, the corporation shall not carry on any other activities not permitted to be carried on (a) by a corporation exempt from federal income tax under section 501 (c) (3) of the Internal Revenue Code, or the corresponding section of any future federal tax code, (b) by a corporation, contributions to which are deductible under section 170 (c) (2) of the Internal Revenue Code, or the corresponding section of any future federal tax code, (c) by a corporation exempt from tax under the Oregon Nonprofit Corporation Act, ORS Ch. 65, et seq., or the corresponding section of any future Oregon Statute, or (d) by a public charter school under Chapter 338 of the Oregon Revised Statutes or the corresponding section of any future Oregon Statute.

Oregon Permissible nonprofit Provisions

5.4 Delegation of Director's Powers

The board of directors by resolution in accordance with its corporate Bylaws may authorize a person or persons, or committee to exercise some or all of the powers that would otherwise be exercised by the board. To the extent so authorized, any such person or persons or committee shall have the duties and responsibilities of the board of directors, and the board of directors shall be relieved to that extent from such duties and responsibilities.

5.5 Director's Limited Liability to the Corporation

- A. Release From Liability: To the fullest extent permitted by the Oregon Nonprofit Corporation Act, no director or officer shall be held personally liable to the corporation for monetary damages resulting from a person's conduct as a director or officer except they shall remain liable for:
1. any breach of the director's duty of loyalty to the Corporation;
 2. acts or omissions not in good faith or which involve intentional misconduct or a knowing violation of law;
 3. any unlawful distribution;

4. any transaction from which a director derived an improper personal benefit; and
5. for any violation under the Oregon Nonprofit Corporation Act, or the corresponding section of any future Oregon Statute, including without limitation conflicts of interest, unlawful distributions and gross negligence.

B. Indemnification: The following provisions shall apply regarding indemnification:

- (1) The corporation shall indemnify to the fullest extent permitted by The Oregon Nonprofit Corporation Act, any persons who have made, or is threatened to be made, a party to an action, suit or proceeding, whether civil, criminal, administrative, investigative or otherwise (including any action, suit or proceeding by or in the right of the corporation) by reason of the fact that the person is or was a director, officer, employee or agent of the corporation, or a fiduciary within the meaning of the Employee Retirement Income Security Act of 1974 with respect to an employee benefit plan, of another association, corporation, partnership, joint venture, limited liability company, trust or other enterprise. The right to and the amount of indemnification shall be determined in accordance with the provisions of the Oregon Nonprofit Corporation Act in effect at the time of the determination.
- (2) To the fullest extent permitted by the Oregon Nonprofit Corporation Act, the corporation shall pay for or reimburse any and all reasonable expenses incurred by a director, officer, employee, agent or fiduciary of the corporation who is a party to a proceeding in advance of the final disposition of the proceeding.
- (3) For the purposes of determining the right to any indemnification under this Article 5.6, Section B, the termination of any action, suit or proceeding by judgment, order, settlement, conviction or upon a plea of nolo contendere, or its equivalent, shall not, of itself, create a presumption that the person acted in bad faith and in a manner which he or she reasonably believed to be in or not opposed to the best interest of the corporation, and with respect to any criminal action or proceedings, had reasonable cause to believe that his or her conduct was unlawful.
- (4) The right to indemnification and to the payment or reimbursement of expenses with regard to a proceeding referred to in this Article 5.6, Section B shall not be exclusive of any other rights to which any person may be entitled or hereafter acquire under any statute, provision of the Articles of Incorporation, Bylaws, Action by the Board of Directors, or officer, employee, agent or fiduciary of administrators of such person.

ARTICLE VI. TYPE OF CORPORATION

The corporation is a Public Benefit nonprofit corporation. As such, this organization shall admit students of any race to all the rights, privileges, programs, and activities

generally accorded or made available to students and shall not discriminate on the basis of race in administering its educational policies, admissions policies, athletic and other organization administered programs.

ARTICLE VII. MEMBERS

The corporation shall not have members as that term is defined in the Oregon Nonprofit Corporation Act.

ARTICLE VIII. DISTRIBUTION UPON DISSOLUTION

Upon the dissolution of the corporation, assets of the corporation that were purchased with public funds shall be given to the State Board of Education as required by ORS 338.105 or the corresponding section of a future Oregon Statute. All other assets shall be distributed in compliance with the Oregon Nonprofit Corporation Act, ORS Ch. 65, et seq., for one or more exempt purposes within the meaning of section 501 (c) (3) of the Internal Revenue Code, or the corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for a public purpose. Any such assets not so disposed of shall be disposed of by a court of competent jurisdiction of the county in which the principal office of the corporation is then located, exclusively for such purposes or to such organization or organizations, as said court shall determine, which are organized and operated exclusively for such purposes.

ARTICLE IX. INCORPORATORS AND INITIAL DIRECTORS

The name and address of the incorporators and initial directors of the corporation are:

1. John VonDoloski
1782 Key Dr. Medford, OR 97501
2. David Blauser - CPA
1024 NE Hefley St. Grants Pass, OR 97524
3. Helen Blauser
1024 NE Hefley st Grants Pass, OR 97524
PO Box 5544 Central Point, OR 97502
4. Joseph VonDoloski
1491 E. Millbrook Mt. Pleasant, MI 48858
5. James Spence
955 Wilson Rd Central Point, OR 97502

ARTICLE X. EXECUTION OF ARTICLES BY INCORPORATORS/ DIRECTORS

The incorporators, who by their signatures, consent to be named as initial directors of the corporation, execute the Articles of Incorporation for the corporation.

<u>Printed Name</u>	<u>Signature</u>
<u>Joseph D VonDobski</u>	<u></u>
<u>James T Spence</u>	<u></u>
<u>David Blaser</u>	<u></u>
<u>Helen Blaser</u>	<u></u>
<u>John VonDobski</u>	<u></u>

Exhibit I
Medford Charter Subcommittee Recommendations on Charter Requests

Charters may request changes to their contract during the renewal negotiation process. This might include changes such as the option for year round school, increases in enrollment caps, or changes in grade levels served. Charters may also request changes outside of the contract renewal negotiation process. In evaluating such requests, the Board will consider the charter's prior track record including academic, fiscal, and organizational performance; instructional quality and fulfillment of the charter's mission.

Sample criteria to evaluate requests include (but are not limited to) the following considerations.

1. **Urgency:** Is the request within 12 months of a charter contract renewal date?
Requests within 12 months of a future renewal should be considered as part of the contract renewal. Similarly, the Board will not consider requests that occur within 12 months following contract renewal.
2. **Capacity:** Does the charter have the institutional capacity to handle the requested change? Are there limitations due to physical space, Charter Board or administrative stability, or staffing concerns?
3. **Rationale:** What is the charter's rationale for requesting the change? Does the proposed change improve outcomes for students or allow the charter to operate more efficiently?
4. **Mission:** Does the request alter the mission of the original charter? For example, a charter approved to support home school students requesting a change to educate all students in traditional school setting. (Requests altering the core mission of the original charter proposal will not be considered.)
5. **Finances:** Is the charter fiscally responsible? Are state school funds being used exclusively for the fulfillment of the school's mission in educating students?
6. **District Measures:** Does the request help MSD in the fulfillment of measures of the system, specifically reducing the achievement gap and increasing graduation rates?
7. **Equity, Diversity and Inclusion:** Does the request advance equity, diversity and inclusion in the charter school?

Further, the Subcommittee recommends the following considerations for analyzing future reimbursement rate requests from charter schools:

To be eligible for an increase above 80%, a charter must have an economically disadvantaged student population in excess of the District average for economically disadvantaged student populations.

1. For each 10% increase above the District average, the charter may be eligible for up to an additional 2% pass through, up to a maximum rate increase of 5%.

Notwithstanding the above, the Board reserves the right to not make any changes outside of the contract renewal process.

Exhibit J
Technology Matrix

Student Information System (SIS)	MSD pays per student cost for Synergy base package and modules purchased by the district.
Phones	MSD provides phone service and up to 10 phones. Charter pays for additional phones.
Internet Access/Network	MSD provides 100% (except KUA – who would need to use District network/switches, etc. to get this service). District provides initial fiber set up; Charter pays the cost to Hunter Communication to move fiber if they change property locations at approximately cost of \$2,500.
Wireless	MSD provides up to 10 access points. Charter school pays for additional access points at approximate cost of \$600/ea.
Help Counter/VIMS	MSD provides single desktop and service.
Computers	2 to 3 units provided by MSD to Charter school for office staff access to network. Upon 30 days advance notice and subject to availability, District may be able to provide units for computer-based testing.
Intranet	Login provided – no cost
Tech Support – either remote or onsite	Charters pay outside providers for tech support. On a very limited basis, District will support MSD provided equipment and software.
Facilities/Technician	Charter schools fall under Group II facility use rates for District facilities for student-based activities. Charter pays technician fee for use of auditorium(s).
iReady	Charter Schools are responsible for costs associated with iReady.
Special Education Teacher	District teacher technology package is provided for District employed teachers, including SPED teachers located at a Charter school.
Background Checks	District pays for background checks for Charter employees. Drug screening and fingerprinting are paid by Charter.
Safe Schools	Provided by District at District cost.
Email	MSD provides upon request.

EXECUTIVE SUMMARY

Meeting Date:	June 18, 2026
Agenda Item:	School Board Policies - second reading
Item Type:	Action
Administrator:	Jeanne Grazioli, Jodi Fahy
Objective:	Adopt, re-adopt and delete policies presented as a first reading on June 11, 2026

Background: OSBA provides quarterly policy updates that include current revisions to state and federal laws and guidelines. Staff has reviewed the updated language and applied revisions which are reflected in the policy packet.

Additionally Policy BG has been added as a first reading following the approval of the Board Operating Agreement (BOA) in order to align the policy with the school visit section of the BOA.

Revisions in **red** font indicate OSBA updated language. Revisions in **blue** font indicate staff updated language.

Policy	Title	Summary
BBAA <i>Delete old version and replace with new version</i>	Board Member's Authority and Responsibilities	<i>There have been several changes to Oregon Public Meetings laws over the last few years. These include statutes from the Oregon Legislature and rules from the Oregon Government Ethics Commission. In 2026, the Legislature passed House Bill 4177, but it will not go into effect as it was vetoed by the governor. The policies included in this update include language that matches the new laws.</i>
BCB	Board Officers	<i>Language has been updated to clarify replacement of a board officer; timing of actions, board chair duties and spokesperson delegation.</i>
BCE <i>Delete old version and replace with new version</i>	Board Committees	<i>There have been several changes to Oregon Public Meetings laws over the last few years. These include statutes from the Oregon Legislature and rules from the Oregon Government Ethics Commission. In 2026, the Legislature passed House Bill 4177, but it will not go into effect as it was</i>

		<i>vetoed by the governor. The policies included in this update include language that matches the new laws.</i>
BCF <i>Delete this policy</i>	Advisory Committees to the Board	<i>Language added to new version of BCE.</i>
BD <i>New policy</i>	Board Meetings, Notices and Communications	<i>There have been several changes to Oregon Public Meetings laws over the last few years. These include statutes from the Oregon Legislature and rules from the Oregon Government Ethics Commission. In 2026, the Legislature passed House Bill 4177, but it will not go into effect as it was vetoed by the governor. The policies included in this update include language that matches the new laws.</i>
BD/BDA <i>Delete this policy</i>	Board Meetings	<i>Language added to new policy BD</i>
BCD <i>Delete old version and replace with new version</i>	Executive Sessions	<i>There have been several changes to Oregon Public Meetings laws over the last few years. These include statutes from the Oregon Legislature and rules from the Oregon Government Ethics Commission. In 2026, the Legislature passed House Bill 4177, but it will not go into effect as it was vetoed by the governor. The policies included in this update include language that matches the new laws.</i>
BDD <i>Delete old version and replace with new version</i>	Board Meeting Procedures	
BDDC <i>Delete old version and replace with new version</i>	Board Meeting Agenda	
BDDG <i>Delete old version and replace with new version</i>	Recordings and Minutes of Board Meetings	
BG	Board-Staff Communications	<i>Updates to this policy align with the revisions to the Board Operating Agreement.</i>

Additional Materials: [Policy Packet 6.18.26](#)

The policy packet is organized with the revised version first (colored font), followed by a draft final version with the revisions incorporated. Policies recommended for deletion include a “delete” watermark across the policy, followed by the recommended new version.

Recommendation: Adopt, delete and readopt policies and ARs as presented in the policy packet.

Suggested Motion: *“I move to adopt, delete and readopt policies as presented in the June 18th policy packet.”*

Medford School District 549C

Code: BBAA
Adopted: 5/22/17
Revised/Readopted: 3/11/19
Orig. Code(s): BBAA

Individual Board Member's Authority and Responsibilities

An individual Board member exercises the authority and responsibility of his or her position only when the Board is in legal session.

A Board member has the authority to act in the name of the Board when authorized by a specific Board motion. The affirmative vote of the majority of members of the Board is required to transact any business. When authorized to act as the district's designated representative in collective bargaining, a Board member may make and accept proposals in bargaining subject to subsequent approval by the Board.

A Board member has the right to express personal opinions. When expressing such opinions in public, the Board member must clearly identify the opinions as his or her own.

Members will be knowledgeable of information requested through Board action, information supplied by the superintendent, gained through attendance at district activities and through professional Board activities.

Members of the Board will adhere to the following procedures in carrying out the responsibilities of Board membership:

1. Request for Information

Any individual Board member who desires a copy of an existing written report or a survey prepared by the administrative staff will make such a request to the superintendent. A copy of the material may be made available to each member of the Board. Requests for the generation of reports or information which require additional expense to the district must be submitted to the Board for consideration.

2. Requests for Legal Opinions

Any legal opinion sought involving the superintendent's employment or performance must be made to the Board chair, with notice provided to other members. Requests for legal opinions by a board member must be approved by a majority vote of the Board. Legal counsel is responsible to the Board.

3. Action on Complaints or Requests Made to Board Members

When Board members receive complaints or requests for action from staff, students, or members of the public, the Board members will direct the staff, students, members of the public to the appropriate complaint policy Board policy KL - Public Complaints. Such information will be conveyed to the superintendent.

4. Board Member's Relationship to Administration

Individual Board members will become informed about the educational program, may visit schools or other facilities to gain information, and may request information from the superintendent. Board members will coordinate with the board secretary to notify the principal prior to school visits. Board members will not intervene in the administration of the district or its schools.

5. Contracts or Agreements

All employment contracts of the district must be approved by the Board, unless otherwise delegated by the Board to the superintendent or designee for approval, before an order can be drawn for payment. If a contract is made without authority of the Board, the individual making such contract shall be personally liable.

END OF POLICY

Legal Reference(s):

[ORS 332.045](#)

[ORS 332.055](#)

[ORS 332.057](#)

[ORS 332.075](#)

38 OR. ATTY. GEN. OP. 1995 (1978)

S. Benton Educ. Ass'n v. Monroe Union High Sch. Dist., 83 Or. App. 425 (1987).

Medford School District

Code: BBAA
Adopted: xx/xx/xx

Board Member's Authority and Responsibilities

An individual Board member exercises the authority and responsibility of their position when the Board is in a meeting which is being held in accordance with Oregon's Public Meetings Law. A Board member has the authority to act in the name of the Board only when authorized by a specific Board motion. The affirmative vote of the majority of members of the Board is required to transact any business.

When authorized to act as the district's designated representative in collective bargaining, a Board member may make and accept proposals in bargaining subject to subsequent approval by the Board.

Board members may speak on behalf of the Board or district only when specifically authorized to do so. Any other statements do not represent the position of the Board or district. When expressing personal opinions in public, Board members are encouraged to clearly identify the opinions as their own.

All Board members shall maintain awareness of relevant district information and participate in Board functions and professional Board development activities.

All members of the Board will adhere to the following in carrying out the responsibilities of membership:

1. Request for Records

Any individual Board member who desires a copy of an existing record may make such a request to the superintendent. Requests involving confidential records or significant staff time will be referred to the Board for approval.

2. Requests for Legal Opinions

Requests for legal advice or opinions by a Board member that will incur a cost for the district must be approved by a majority vote of the Board before the request is made to legal counsel. The Board chair is authorized to obtain legal advice or opinions if advantageous to do so prior to the next meeting (e.g., advice regarding an executive session or a decision to invite district legal counsel) without a need for Board approval. Legal counsel is responsible to the Board.

3. Action on Complaints or Requests Made to a Board Member

When a Board member receives complaints or requests for action from staff, students or members of the public, the Board member will direct the staff, students, members of the public to the public complaint policy Board policy KL – Public Complaints. Such information will be conveyed to the superintendent. An individual Board member is not authorized to independently act on complaints.

4. Board Member's Communication with Administration

No individual Board member may direct the superintendent or other staff to action without Board authorization. No Board member will intervene in the administration of the district or its schools.

5. Contracts or Agreements

All district contracts must be approved by the Board, unless otherwise delegated by the Board to the superintendent or designee for approval before an order can be drawn for payment. If a contract is made without authority of the Board, the individual making such contract shall be personally liable.

6. Visits to Schools

Board members may visit schools in accordance with Board policy BG – Board–Staff Communications.

7. Public Meetings Law

All Board members will comply with Public Meetings Law, including participating in an approved¹ training at least once during each term of office.

8. Mandatory Reporting

A Board member having reasonable cause to believe that any child with whom the Board member comes in contact has suffered abuse or that any person with whom the Board member comes in contact has abused a child shall immediately make an oral report or cause an oral report be made to Department of Human Services² or local law enforcement.

9. Oregon Ethics Laws

All Board members will adhere to Oregon Government Ethics laws, including filing the statement of economic interest as required by Oregon Revised Statute (ORS) 244.

10. Confidential Information

All Board members will not disclose confidential information received as part of Board service.

11. Other Laws, Policies, Agreements and Procedures

All Board members will follow all laws, Board policies, working agreements, and any other procedures established by the district.

END OF POLICY

Legal Reference(s):

¹ Approved by the Oregon Government Ethics Commission.

² (855) 503-SAFE (7233)

[ORS 192.311 – 192.478](#)
[ORS 192.610 – 192.705](#)
[ORS Chapter 244](#)

[ORS 332.045](#)
[ORS 332.055](#)
[ORS 332.057](#)

[ORS 332.075](#)
[ORS 332.107](#)
[ORS 419B.010](#)

38 OR. ATTY. GEN. OP. 1995 (1978)
S. Benton Educ. Ass’n v. Monroe Union High Sch. Dist., 83 Or. App. 425 (1987).

Medford School District 549C

Code: BCB
 Adopted: 9/15/09
 Revised/Readopted: 3/11/19; xx/xx/xx
 Orig. Code(s): BCB

Board Officers

~~At No later than the next regular its first scheduled~~ meeting after July 1, the Board will elect one of its members to serve as chair and one to serve as vice chair for a term of one year. ~~In an election year, this meeting must occur no later than the last day of July.~~ No member of the Board may serve as chair more than four years in succession. ~~If a Board member is unable to continue to serve as an officer, a replacement will be elected and will serve the remainder of the officer's term until the following July.~~

The Board chair will:

1. ~~Assist the superintendent in establishing~~ Prepare the agenda for ~~regular~~ Board meetings in accordance with Board policy BDDC – Board Meeting Agenda;
2. Call special meetings ~~when required~~;
3. Preside at ~~all~~ meetings of the Board and enforce the rules of order; ~~The Board chair has inherent authority to keep order and to impose any reasonable restrictions necessary for the efficient and orderly conduct of a meeting. If public comment is a part of the meeting, the Board chair may regulate the order and length of appearances and limit appearances to presentations of relevant points in accordance with Board policy BDDH – Public Comment at Board Meetings;~~
4. Sign ~~the minutes and other~~ official documents that require the signature of the chair;
5. Represent the district and the Board at official functions, unless this duty is delegated by the Board chair to another Board member;
6. Appoint ~~all~~ Board members to committees ~~unless otherwise ordered by the Board~~;
7. Have the right to discuss issues and vote; ~~and~~
8. ~~Perform such other duties as may be prescribed by law or by action of the Board.~~

In the absence, ~~incapacitation or death~~ of the chair, the vice chair will perform the duties of chair and, when so acting, will have the chair's powers. The vice chair will perform other functions as designated by the Board.

~~If a Board member is unable to continue to serve as an officer, a replacement will be elected. The replacement officer will serve the remainder of the officer's term, until the officer resigns or ceases to remain on the Board, or until the officer is removed or replaced by the Board.~~

~~The superintendent will designate a staff member to serve as Board secretary and will directly supervise and evaluate the secretary. The secretary to the Board will take notes at Board meetings, compile minutes, and perform related work as assigned by the superintendent or requested by the Board chair. These duties will include, but not be limited to, the following:~~

- ~~1. Record the disposition of all matters on which the Board considered action.~~
- ~~2. Prepare and distribute minutes in advance for approval at the next Board meeting.~~
- ~~3. Maintain properly authenticated official copies of the minutes.~~
- ~~4. Maintain the official record of Board policies~~
- ~~5. Properly post all Board meetings.~~

Board ~~or District~~ Spokesperson:

~~The Board may designate the chair, vice chair or another Board member as the Board's spokesperson. The Board may appoint one of its members, usually the chair, or another person to make authorized statements to the public or the media when the Board deems that, under the circumstances, the district's position should be articulated by a single voice. The spokesperson serves at the Board's direction and may be removed or replaced at any time by action of a majority of the Board.~~ A Board member speaks on behalf of the Board only when specifically authorized by the Board. Official Board statements will be made using official district or Board communication channels, websites or social media accounts, or at official district events. When a Board member expresses personal opinions in public, the Board member is encouraged to clearly identify the opinions as personal. Comments made by Board members when not authorized by the Board are considered personal comments of the Board member.

END OF POLICY

Legal Reference(s):

[ORS 255.335](#)
[ORS 332.040](#)

[ORS 332.045](#)
[ORS 332.057](#)

OAR 166
[OAR 166-400-0010\(9\)](#)
OAR 199-050-0050

Medford School District 549C

Code: BCB
Adopted: 9/15/09
Revised/Readopted: 3/11/19; xx/xx/xx
Orig. Code(s): BCB

Board Officers

No later than the next regular meeting after July 1, the Board will elect one of its members to serve as chair and one to serve as vice chair for a term of one year. In an election year, this meeting must occur no later than the last day of July. No member of the Board may serve as chair more than four years in succession.

The Board chair will:

1. Prepare the agenda for Board meetings in accordance with Board policy BDDC – Board Meeting Agenda;
2. Call special meetings;
3. Preside at meetings of the Board and enforce the rules of order; The Board chair has inherent authority to keep order and to impose any reasonable restrictions necessary for the efficient and orderly conduct of a meeting. If public comment is a part of the meeting, the Board chair may regulate the order and length of appearances and limit appearances to presentations of relevant points in accordance with Board policy BDDH – Public Comment at Board Meetings;
4. Sign official documents that require the signature of the chair;
5. Represent the district and the Board at official functions, unless this duty is delegated by the Board chair to another Board member;
6. Appoint Board members to committees unless otherwise ordered by the Board;
7. Have the right to discuss issues and vote; and
8. Perform such other duties as may be prescribed by law or by action of the Board.

In the absence of the chair, the vice chair will perform the duties of chair and, when so acting, will have the chair's powers. The vice chair will perform other functions as designated by the Board.

If a Board member is unable to continue to serve as an officer, a replacement will be elected. The replacement officer will serve the remainder of the officer's term, until the officer resigns or ceases to remain on the Board, or until the officer is removed or replaced by the Board.

Board Spokesperson:

The Board may designate the chair, vice chair or another Board member as the Board’s spokesperson. A Board member speaks on behalf of the Board only when specifically authorized by the Board. Official Board statements will be made using official district or Board communication channels, websites or social media accounts, or at official district events. When a Board member expresses personal opinions in public, the Board member is encouraged to clearly identify the opinions as personal. Comments made by Board members when not authorized by the Board are considered personal comments of the Board member.

END OF POLICY

Legal Reference(s):

[ORS 255.335](#)
[ORS 332.040](#)

[ORS 332.045](#)
[ORS 332.057](#)

[OAR 166](#)
[OAR 166-400](#)
[OAR 199-050-0050](#)

Medford School District 549C

Code: BCE
Adopted: 12/15/09
Revised/Readopted: 3/11/19
Orig. Code(s): BCE

Board Committees

The Board shall have no standing committees. The chair, at the direction of the Board, may appoint such special committees as may be deemed necessary.

Committee-of-the-whole meetings, called “work sessions” may be held. Committee-of-the-whole meetings may be called by the Board chair or majority of Board members.

All meetings of special committees and of committees-of-the-whole will follow the Public Meetings Law. The Board or its committees may meet in an executive session to discuss matters when such session is required or permitted by law.

A Board committee may appoint advisory members from the staff, student body or community with approval of the Board. Advisory members will be instructed in the committee’s functions and their status. Advisory members may not be included in considering whether a quorum of the committee is present, nor may they vote on recommendations to be made to the Board. Either an advisory member or an ex-officio member may present a written minority report to the Board.

END OF POLICY

Legal Reference(s):

[ORS 192.610 to -192.690](#)

[ORS 332.045](#)

[ORS 332.105](#)

Medford School District 549C

Code: BCE
Adopted: xx/xx/xx

Board Committees

The Board may establish committees. A Board committee is a group of Board members, staff, students and/or community members tasked by the Board to make a decision on behalf of the Board or make a recommendation to the Board on policy or administration. The district may have additional administrative committees.

Board committees may be classified into two general types based on membership:

1. Board subcommittees are primarily made up of Board members, e.g., superintendent evaluation committee, long-range planning committee, policy committee;
2. Advisory committees are primarily made up of non-Board members, e.g., bond steering committee.

Regardless of classification, the Board can include Board members and non-Board members on committees.

Board committees will not have the power to act for the Board except as the Board has specifically authorized. Committee meetings may be called by the committee in accordance with any direction from the Board and committee procedures. Committee recommendations and reports will be provided to the Board.

All meetings of Board committees will follow the Public Meetings Law¹, including the requirement to record the meetings or take meeting minutes. A committee may sit in an executive session when such meeting is in accordance with the committee's assigned purpose and when such session is permitted by law. Administrative committees, including superintendent committees, are generally not subject to Public Meetings Law.²

When establishing a Board committee, the Board will determine:

1. Committee membership and appointment process;
2. The task of the committee;
3. What resources are needed and will be provided to the committee;

¹ OAR 199-050-0010(1)(b) provides that Public Meetings Law apply to bodies "with authority to make recommendations to a public body on policy or administration."

² OAR 199-050-0010(2)(b) provides that Public Meetings Law does not apply to "bodies appointed by an individual public official with authority to make recommendations only that individual public official who has the authority to act on the body's recommendation and is not required to pass the recommendations on unchanged to a public body."

4. The length of time the committee will exist³;
5. Expectations regarding any actions or recommendations of the committee.

END OF POLICY

Legal Reference(s):

[ORS 192.610 - 192.705](#)
[ORS 332.045](#)
[ORS 332.105](#)

[OAR 199-040](#)
[OAR 199-050](#)

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³ The Board can establish a standing committee, which has a continuing existence or a special committee, which goes out of existence as soon as the committee has completed a specified task.

Medford School District 549C

Code: BCF
 Adopted: 9/15/09
 Revised/Readopted: 3/11/19
 Orig. Code(s): BCF

Advisory Committees to the Board

In an ongoing effort to increase communications with the public and to provide for community involvement, the Board may appoint advisory committees to advise it on matters of interest or concern in which the Board believes an exchange of ideas will be of benefit to the district. Such committees will not be appointed on a permanent basis, but rather to assist in a particular area of activity.

All meetings of advisory committees shall be considered open meetings. The press may attend and report proceedings. Visitors shall sit apart from the committee members and shall speak only when invited to do so by the committee chair.

The composition of advisory committees shall be broadly represented and shall take into consideration the specific tasks assigned to the committee. Appointment of community members to an advisory committee shall be made by the Board; appointment of staff members shall be made by the Board upon recommendation of the superintendent.

The Board shall adopt guidelines for each committee as appropriate, which shall include, but not be limited to, the following:

1. The service the Board wishes the committee to render and the extent and limitations of its responsibilities;
2. The length of time the committee is being asked to serve;
3. The resources the Board will provide;
4. Approximate dates on which the Board wishes to receive committee reports.

Except as specifically provided by the Board, advisory committees will cease to function when their reports have been received by the Board or when the purposes for which they were established have been accomplished.

The Board's responsibility cannot be delegated or surrendered to others; therefore, all recommendations of an advisory committee must be submitted to the Board for action and must be recognized as advisory in nature.

END OF POLICY

Legal Reference(s):

[ORS 192.610](#)
[ORS 192.630](#)

[ORS 294.414](#)
[ORS 329.704](#)

[ORS 332.107](#)

OR. DEP'T OF JUSTICE, OR. ATT'Y GENERAL'S MODEL PUBLIC CONTRACT RULES MANUAL.

DELETED

Medford School District 549C

Code: BD
Adopted: xx/xx/xx

Board Meetings, Notices and Communications

Definitions

“Communication” means the expression or transmission of information from one person to another through verbal, non-verbal, written, or electronic means. Non-verbal means include gestures, such as thumbs-up and thumbs-down, as well as sign language.

“Convening” means gathering in a physical location, using electronic, video or telephonic technology to be able to communicate contemporaneously among participants, using serial electronic written communication among participants, or using an intermediary to communicate among participants.

“Decision” means any determination, action, vote or final disposition upon a motion, proposal, resolution, order, ordinance or measure on which a vote of the Board¹ is required, at any meeting at which a quorum is present.

“Decision-making process” means the process the Board engages in to make a decision, such as: (a) identifying or selecting the nature of the decision to be made; (b) gathering information related to the decision to be made; (c) identifying and assessing alternatives; (d) weighing information; and (e) making a decision.

“Deliberation” means discussion or communication that is part of a decision-making process.

“Executive session” means any meeting or part of a meeting of the Board that is closed to certain persons for deliberation on certain matters.

“Intermediary” means a person who is used to facilitate communications among members of the Board about a matter subject to deliberation or decision by the Board, by sharing information received from a member of the Board with other members of the Board. The term “intermediary” can include a member of the Board.

“Meeting” means the convening of the Board for which a quorum is required in order to make a decision or to deliberate toward a decision on any matter. Meeting does not include any on-site inspection of any project or program or the attendance of members of the Board at any national, regional or state association to which the Board or the members belong.

“Public Meetings Law” means Oregon Revised Statutes (ORS) 192.610 – 192.705 and Oregon Administrative Rules (OAR) 199-040 and 199-050.

¹ This policy is written to apply to the Board. Other bodies, including Board committees, may be subject to public meeting laws. This policy may help other bodies understand what is required, but is intended as direction for the Board.

“Quorum” means the minimum number of members of the Board required to legally transact business. For the Board, a quorum is four Board members.

“Work session” or “workshop” means meetings held for the purpose of either presenting information to the Board to prepare for a regular or special meeting, or to allow the Board to engage in preliminary discussions or deliberations.

Board Authority at Meetings

The Board has the authority to act only when a quorum is present at a properly noticed regular, special or emergency meeting. The affirmative vote of **four**^{2} members of the Board is required to transact any business.

Types of Meetings

The Public Meetings Law applies to all regular, special, emergency, executive session and work session meetings of the Board.

1. Regular Meetings

The regular meeting schedule will be established at the annual organizational meeting each year and may be changed by the Board with public notice. The purpose of each regular meeting will be to conduct the regular Board business.

2. Special Meetings

A special meeting may be scheduled when less than a quorum is present at a regular meeting and therefore no business may be conducted, additional business still needs to be conducted at the ending time of a meeting, conducting business prior to the next regular meeting would be advantageous to the district, or other reasons. Special meetings may be convened by the Board chair, upon request of three Board members, or by common consent of the Board.

3. Emergency Meetings

Emergency meetings may be called in the case of an actual emergency upon appropriate notice under the circumstances. Only topics necessitated by the emergency may be discussed or acted upon at the emergency meeting.

4. Work Sessions

The Board may use regular or special meetings for the purpose of conducting work sessions to provide its members with opportunities for planning and thoughtful discussion. Work sessions will be conducted in accordance with Public Meetings Law. The Board may make official decisions during a work session.

² {ORS 332.055 provides “the affirmative vote of the majority of members of the board is required to transact any business.” If the Board has five members, three votes are required. If the Board has seven members, four votes. If the Board has nine members, five votes.}

5. Executive Sessions

Executive sessions may be held during regular, special or emergency meetings for a reason permitted by law. (See Board policy BDC – Executive Sessions).

Communications Outside of a Board Meeting (Serial Meetings Prohibited)

Private meetings where a quorum of the Board engages in discussions or communications that are part of the Board’s decision-making process on matters within the authority of the Board violate Public Meetings Law, except as part of an executive session.

A quorum of Board members shall not, outside of a meeting conducted in compliance with Public Meetings Laws, use a series of communications of any kind, directly or through intermediates, for the purpose of deliberating or deciding on any matter that is within the jurisdiction of the Board. This prohibition applies to using any one or a combination of the following methods of communication:

1. In-person;
2. Telephone calls;
3. Videos, videoconferencing, or electronic video applications;
4. Written communication, including electronic written communications, such as email, texts, and other electronic applications;
5. Use of one or more intermediaries to convey information among members; and
6. Any other means of conveying information.

Communications outside of a Board meeting may contain communications between or among members of the Board, including a quorum, that are:

1. Purely factual or educational in nature and that convey no deliberation or decision on any matter that might reasonably come before the Board;
2. Not related to any matter that, at any time, could reasonably be foreseen to come before the Board for deliberation and decision; or
3. Nonsubstantive in nature, such as communication relating to scheduling, leaves of absence and other similar matters.

E-mails sent to other Board members are encouraged to have the following notice:

Important: Please do not reply or forward this communication if this communication could constitute a decision or deliberation toward a decision between and among members of the district board. Board member electronic communications on district business are subject to Public Meetings and Public Records Law.

A quorum of Board members may attend social meetings or gatherings so long as no discussions or deliberations are had.

Meeting Location, Public Accommodations and Logistical Requirements

All meetings will be open to the public except as provided by law.

All Board meetings, including Board retreats and work sessions, will be held within district boundaries, except as allowed by law³. The Board may attend training sessions outside the district boundaries but may not deliberate or discuss district business. No meeting will be held at any place where discrimination on the basis of disability, race, creed, color, sex, sexual orientation, gender identity, age or national origin is practiced. Meeting locations shall be accessible to persons with disabilities.

Any Board meeting may be held in person, through the use of electronic or telephonic means, or in some combination of in-person, electronic or telephonic means.

Access to and the ability to attend all meetings (excluding executive sessions) by telephone, video or other electronic or virtual means will be made available when reasonably possible. For Board meetings (excluding executive session) held by telephone or other electronic means of communication, the district shall make available a place or an electronic means by which the public can listen to or view the meetings in real time. The place provided may be a place where no Board member is present.

For executive sessions where the media are statutorily authorized to be present, if any person, including any Board member, is attending the executive session by telephone, video, or other electronic means, the district shall provide members of the media the same attendance option. The district may establish reasonable security measures to ensure the media's attendance by telephone, video, or other electronic means is conducted through a secure connection or method.

If requested to do so at least 48 hours before a meeting held in public, the Board shall make a good faith effort to provide an interpreter for persons who are deaf or hard of hearing. The request should include the name of the requester, sign language preference and any other relevant information requested. If the meeting is being held upon less than 48 hours' notice and a request for an interpreter is made, the Board shall make a reasonable effort to have an interpreter present. Other appropriate aids and services may be provided upon request and appropriate advance notice.

If requested to do so at least 48 hours before a meeting held in public, the Board will make a reasonable effort to provide translation services.

Recordings or minutes will be kept for all meetings in accordance with state law and Board policy BDDG – Recordings or Minutes of Board Meetings.

All meetings shall comply with applicable provisions of the Oregon Indoor Clean Air Act.

Public Notice Requirements

The district posts public notice of its meetings on the district's website or on a publicly accessible website hosted by a third-party that is linked to the district's website.

³ ORS 192.630(4). Meetings of the governing body of a public body shall be held within the geographic boundaries over which the public body has jurisdiction, or at the administrative headquarters of the public body or at the other nearest practical location. Training sessions may be held outside the jurisdiction if no deliberations toward a decision are involved.

The public notice shall identify the following:

1. The time, date, location of the meeting, and, to the extent reasonably possible, will include the electronic link or telephone access information to allow members of the public to attend the meeting by telephone or electronic means;
2. The agenda or list of the principal subjects anticipated to be considered at the meeting and will be specific enough to permit the public to recognize matters in which they are interested. The Board may amend the agenda or may add or remove items from the list of principal subjects prior to or during a meeting. See Board policy BDDC – Board Meeting Agenda for additional meeting agenda information; and
3. The name, telephone number, and email address of a person at the district office to contact to request an interpreter or other communication aids or a statement that the district will provide a sign language interpreter or other communication aids at the meeting.

The district will provide notice to interested persons and news representatives who have requested notice through means reasonably calculated to provide actual notice to interested persons known to the Board.

For all regular meetings, the meeting notice shall be provided with as much advance notice as reasonably possible, but no less than 48 hours' advance notice.

For all special meetings, the meeting notice shall be provided with no less than 24 hours' advance notice.

For an emergency meeting, public notice shall be provided with as much advance notice as reasonably possible given the emergency circumstances. The district shall attempt to contact the media and other interested persons to inform them of the emergency meeting by telephone, email, social media, or other method reasonably calculated to provide actual notice. If reasonably possible under the emergency circumstances, the emergency meeting notice shall be conspicuously displayed on the district's website or on a publicly accessible website hosted by a third-party hosted and linked to the district's website.

If a meeting will include an executive session, the notice shall comply with the above notice requirements and the notice shall also identify the specific statutory citation and appropriate subsection and paragraph authorizing the executive session, as well as a general description of the statutory authorization. Example:

“The Board will meet in executive session under ORS 192.660(2)(a) to consider the employment of a public officer, employee, staff member or individual agent.”

If an executive session is to be part of an open regular, special, or emergency meeting, the notice shall comply with the above notice requirements and prior to entering the executive session, the Board chair shall make a public announcement and identify in open session the specific statutory provision and appropriate subsection and paragraph authorizing the executive session, as well as a general description of the statutory authorization (See Board policy BDC – Executive Sessions for additional information on executive sessions.)

Complaints

Complaints regarding Public Meetings Laws can be filed in accordance with Public Meetings Law complaint procedures outlined in Board policy KL – Public Complaints. Complaints must be filed within 30 days of the alleged violation.

Mandatory Training

Every member of the Board shall attend or view a training on Public Meetings Law as required by ORS 192.700 and Board policy BBAA – Board Member’s Authority and Responsibilities.

END OF POLICY

Legal Reference(s):

[ORS Chapter 192](#)
[ORS 332.040 - 332.061](#)

[ORS 332.107](#)
[ORS 433.835 - 433.875](#)

[OAR 199-050-0005 – 199-050-0085](#)

OR. ATTY. GEN. *Public Records and Meetings Manual*.

Medford School District 549C

Code: BD
Adopted: xx/xx/xx

Board Meetings, Notices and Communications

Definitions

“Communication” means the expression or transmission of information from one person to another through verbal, non-verbal, written, or electronic means. Non-verbal means include gestures, such as thumbs-up and thumbs-down, as well as sign language.

“Convening” means gathering in a physical location, using electronic, video or telephonic technology to be able to communicate contemporaneously among participants, using serial electronic written communication among participants, or using an intermediary to communicate among participants.

“Decision” means any determination, action, vote or final disposition upon a motion, proposal, resolution, order, ordinance or measure on which a vote of the Board¹ is required, at any meeting at which a quorum is present.

“Decision-making process” means the process the Board engages in to make a decision, such as: (a) identifying or selecting the nature of the decision to be made; (b) gathering information related to the decision to be made; (c) identifying and assessing alternatives; (d) weighing information; and (e) making a decision.

“Deliberation” means discussion or communication that is part of a decision-making process.

“Executive session” means any meeting or part of a meeting of the Board that is closed to certain persons for deliberation on certain matters.

“Intermediary” means a person who is used to facilitate communications among members of the Board about a matter subject to deliberation or decision by the Board, by sharing information received from a member of the Board with other members of the Board. The term “intermediary” can include a member of the Board.

“Meeting” means the convening of the Board for which a quorum is required in order to make a decision or to deliberate toward a decision on any matter. Meeting does not include any on-site inspection of any project or program or the attendance of members of the Board at any national, regional or state association to which the Board or the members belong.

“Public Meetings Law” means Oregon Revised Statutes (ORS) 192.610 – 192.705 and Oregon Administrative Rules (OAR) 199-040 and 199-050.

¹ This policy is written to apply to the Board. Other bodies, including Board committees, may be subject to public meeting laws. This policy may help other bodies understand what is required, but is intended as direction for the Board.

“Quorum” means the minimum number of members of the Board required to legally transact business. For the Board, a quorum is four Board members.

“Work session” or “workshop” means meetings held for the purpose of either presenting information to the Board to prepare for a regular or special meeting, or to allow the Board to engage in preliminary discussions or deliberations.

Board Authority at Meetings

The Board has the authority to act only when a quorum is present at a properly noticed regular, special or emergency meeting. The affirmative vote of four members of the Board is required to transact any business.

Types of Meetings

The Public Meetings Law applies to all regular, special, emergency, executive session and work session meetings of the Board.

1. Regular Meetings

The regular meeting schedule will be established at the annual organizational meeting each year and may be changed by the Board with public notice. The purpose of each regular meeting will be to conduct the regular Board business.

2. Special Meetings

A special meeting may be scheduled when less than a quorum is present at a regular meeting and therefore no business may be conducted, additional business still needs to be conducted at the ending time of a meeting, conducting business prior to the next regular meeting would be advantageous to the district, or other reasons. Special meetings may be convened by the Board chair, upon request of three Board members, or by common consent of the Board.

3. Emergency Meetings

Emergency meetings may be called in the case of an actual emergency upon appropriate notice under the circumstances. Only topics necessitated by the emergency may be discussed or acted upon at the emergency meeting.

4. Work Sessions

The Board may use regular or special meetings for the purpose of conducting work sessions to provide its members with opportunities for planning and thoughtful discussion. Work sessions will be conducted in accordance with Public Meetings Law. The Board may make official decisions during a work session.

5. Executive Sessions

Executive sessions may be held during regular, special or emergency meetings for a reason permitted by law. (See Board policy BDC – Executive Sessions).

Communications Outside of a Board Meeting (Serial Meetings Prohibited)

Private meetings where a quorum of the Board engages in discussions or communications that are part of the Board's decision-making process on matters within the authority of the Board violate Public Meetings Law, except as part of an executive session.

A quorum of Board members shall not, outside of a meeting conducted in compliance with Public Meetings Laws, use a series of communications of any kind, directly or through intermediates, for the purpose of deliberating or deciding on any matter that is within the jurisdiction of the Board. This prohibition applies to using any one or a combination of the following methods of communication:

1. In-person;
2. Telephone calls;
3. Videos, videoconferencing, or electronic video applications;
4. Written communication, including electronic written communications, such as email, texts, and other electronic applications;
5. Use of one or more intermediaries to convey information among members; and
6. Any other means of conveying information.

Communications outside of a Board meeting may contain communications between or among members of the Board, including a quorum, that are:

1. Purely factual or educational in nature and that convey no deliberation or decision on any matter that might reasonably come before the Board;
2. Not related to any matter that, at any time, could reasonably be foreseen to come before the Board for deliberation and decision; or
3. Nonsubstantive in nature, such as communication relating to scheduling, leaves of absence and other similar matters.

E-mails sent to other Board members are encouraged to have the following notice:

Important: Please do not reply or forward this communication if this communication could constitute a decision or deliberation toward a decision between and among members of the district board. Board member electronic communications on district business are subject to Public Meetings and Public Records Law.

A quorum of Board members may attend social meetings or gatherings so long as no discussions or deliberations are had.

Meeting Location, Public Accommodations and Logistical Requirements

All meetings will be open to the public except as provided by law.

All Board meetings, including Board retreats and work sessions, will be held within district boundaries, except as allowed by law². The Board may attend training sessions outside the district boundaries but may not deliberate or discuss district business. No meeting will be held at any place where discrimination on the basis of disability, race, creed, color, sex, sexual orientation, gender identity, age or national origin is practiced. Meeting locations shall be accessible to persons with disabilities.

Any Board meeting may be held in person, through the use of electronic or telephonic means, or in some combination of in-person, electronic or telephonic means.

Access to and the ability to attend all meetings (excluding executive sessions) by telephone, video or other electronic or virtual means will be made available when reasonably possible. For Board meetings (excluding executive session) held by telephone or other electronic means of communication, the district shall make available a place or an electronic means by which the public can listen to or view the meetings in real time. The place provided may be a place where no Board member is present.

For executive sessions where the media are statutorily authorized to be present, if any person, including any Board member, is attending the executive session by telephone, video, or other electronic means, the district shall provide members of the media the same attendance option. The district may establish reasonable security measures to ensure the media's attendance by telephone, video, or other electronic means is conducted through a secure connection or method.

If requested to do so at least 48 hours before a meeting held in public, the Board shall make a good faith effort to provide an interpreter for persons who are deaf or hard of hearing. The request should include the name of the requester, sign language preference and any other relevant information requested. If the meeting is being held upon less than 48 hours' notice and a request for an interpreter is made, the Board shall make a reasonable effort to have an interpreter present. Other appropriate aids and services may be provided upon request and appropriate advance notice.

If requested to do so at least 48 hours before a meeting held in public, the Board will make a reasonable effort to provide translation services.

Recordings or minutes will be kept for all meetings in accordance with state law and Board policy BDDG – Recordings or Minutes of Board Meetings.

All meetings shall comply with applicable provisions of the Oregon Indoor Clean Air Act.

Public Notice Requirements

The district posts public notice of its meetings on the district's website or on a publicly accessible website hosted by a third-party that is linked to the district's website.

The public notice shall identify the following:

² ORS 192.630(4). Meetings of the governing body of a public body shall be held within the geographic boundaries over which the public body has jurisdiction, or at the administrative headquarters of the public body or at the other nearest practical location. Training sessions may be held outside the jurisdiction if no deliberations toward a decision are involved.

1. The time, date, location of the meeting, and, to the extent reasonably possible, will include the electronic link or telephone access information to allow members of the public to attend the meeting by telephone or electronic means;
2. The agenda or list of the principal subjects anticipated to be considered at the meeting and will be specific enough to permit the public to recognize matters in which they are interested. The Board may amend the agenda or may add or remove items from the list of principal subjects prior to or during a meeting. See Board policy BDDC – Board Meeting Agenda for additional meeting agenda information; and
3. The name, telephone number, and email address of a person at the district office to contact to request an interpreter or other communication aids or a statement that the district will provide a sign language interpreter or other communication aids at the meeting.

The district will provide notice to interested persons and news representatives who have requested notice through means reasonably calculated to provide actual notice to interested persons known to the Board.

For all regular meetings, the meeting notice shall be provided with as much advance notice as reasonably possible, but no less than 48 hours' advance notice.

For all special meetings, the meeting notice shall be provided with no less than 24 hours' advance notice.

For an emergency meeting, public notice shall be provided with as much advance notice as reasonably possible given the emergency circumstances. The district shall attempt to contact the media and other interested persons to inform them of the emergency meeting by telephone, email, social media, or other method reasonably calculated to provide actual notice. If reasonably possible under the emergency circumstances, the emergency meeting notice shall be conspicuously displayed on the district's website or on a publicly accessible website hosted by a third-party hosted and linked to the district's website.

If a meeting will include an executive session, the notice shall comply with the above notice requirements and the notice shall also identify the specific statutory citation and appropriate subsection and paragraph authorizing the executive session, as well as a general description of the statutory authorization. Example:

“The Board will meet in executive session under ORS 192.660(2)(a) to consider the employment of a public officer, employee, staff member or individual agent.”

If an executive session is to be part of an open regular, special, or emergency meeting, the notice shall comply with the above notice requirements and prior to entering the executive session, the Board chair shall make a public announcement and identify in open session the specific statutory provision and appropriate subsection and paragraph authorizing the executive session, as well as a general description of the statutory authorization (See Board policy BDC – Executive Sessions for additional information on executive sessions.)

Complaints

Complaints regarding Public Meetings Laws can be filed in accordance with Public Meetings Law complaint procedures outlined in Board policy KL – Public Complaints. Complaints must be filed within 30 days of the alleged violation.

Mandatory Training

Every member of the Board shall attend or view a training on Public Meetings Law as required by ORS 192.700 and Board policy BBAA – Board Member’s Authority and Responsibilities.

END OF POLICY

Legal Reference(s):

[ORS Chapter 192](#)
[ORS 332.040](#) - 332.061

[ORS 332.107](#)
[ORS 433.835](#) - 433.875

[OAR 199-050-0005](#) – 199-050-0085

OR. ATTY. GEN. *Public Records and Meetings Manual*.

DRAFT

Medford School District 549C

Code: BD/BDA
 Adopted: 1/09/17
 Revised/Readopted: 3/11/19; 10/19/23
 Orig. Code(s): BD

Board Meetings

The Board has the authority to act only when a quorum is present at a duly called regular, special or emergency meeting. “Meeting” means the convening¹ of a quorum of the Board as the district’s governing body to make a decision² or to deliberate³ toward a decision on any matter. This includes meeting for the purpose of gathering information to serve as the basis for a subsequent decision or recommendation by the Board, i.e. a work session. “Meeting” does not include any on-site inspection of any project or program the attendance of members of the Board at any national, regional or state association to which the Board or its members belong.

The affirmative vote of the majority of members of the Board is required to transact any business.

All regular, special and emergency meetings of the Board will be open to the public except as provided by law. Access to and the ability to attend all meetings (excluding executive sessions) by telephone, video or other electronic or virtual means will be made available when reasonably possible. Board meetings are not meetings with the public, but meetings of the Board held in public and the Board may impose limits on public participation at meetings in order to carry out its legal functions properly and efficiently. All meetings will be conducted in compliance with state and federal statutes.

All Board meetings, including Board retreats and work sessions, will be held within district boundaries, except as allowed by law.⁴ The Board may attend training sessions outside the district boundaries but cannot deliberate or discuss district business. No meeting will be held at any place where discrimination on the basis of disability, race, creed, color, sex, sexual orientation⁵, age or national origin is practiced.

The Board will give public notice reasonably calculated to give actual notice to interested persons, including those with disabilities, and the news media which have requested notice of the time and place for all Board meetings and of the principal subjects to be considered. The Board may consider additional subjects at a meeting, even if they are not included in the notice.

¹ “Convening” means: (a) Gathering in a physical location; (b) Using electronic, video or telephonic technology to be able to communicate contemporaneously among participants; (c) Using serial electronic written communications among participants; or (d) Using an intermediary to communicate among participants.

² “Decision” means any determination, action, vote or final disposition upon a motion, proposal, resolution, order, ordinance or measure on which a vote of a governing body is required, at any meeting at which a quorum is present.

³ “Deliberation” means discussion or communication that is part of a decision-making process.

⁴ ORS 192.630(4). Meetings of the governing body of a public body shall be held within the geographic boundaries over which the public body has jurisdiction, or at the administrative headquarters of the public body or at the other nearest practical location. Training sessions may be held outside the jurisdiction if no deliberations toward a decision are involved.

⁵ As defined in ORS 174.100

If requested to do so at least 48 hours before a meeting held in public, the Board shall provide an interpreter for hearing impaired persons. If the meeting is being held upon less than 48 hours' notice and a request for an interpreter is made, the Board shall make a reasonable effort to have an interpreter present. Other appropriate auxiliary aids and services will be provided upon request and appropriate advance notice. Communications with all individuals with disabilities shall be as effective as communications with others.

All meetings held in public shall comply with the Oregon Indoor Clean Air Act.

The possession of dangerous or deadly weapons and firearms, as defined in law and Board policy, is prohibited on district property.

1. Regular, Special and Emergency Meetings

Generally, a regular Board meeting will be held each month. The regular meeting schedule will be established at the organizational meeting and may be changed by the Board with proper notice. The purpose of each regular monthly meeting will be to conduct the regular Board business.

No later than the next regular meeting following July 1, the Board will hold an organizational meeting to elect Board officers for the coming year and to establish the year's schedule of Board meetings. In Board election years (odd numbered years), the first meeting will be held no later than July 31.

Special meetings can be convened by the Board chair upon request of three Board members, or by common consent of the Board at any time to discuss any topic. A special meeting may be scheduled if less than a quorum is present at a meeting, additional business still needs to be conducted at the ending time of a meeting, or conducting business prior to the next regular meeting would be advantageous to the district or other reasons. At least 24 hours' notice must be provided to all Board members, the news media, which have requested notice, and the general public for any special meeting.

Emergency meetings can be called by the Board in the case of an actual emergency upon appropriate notice under the circumstances. The minutes of the emergency meeting must describe the emergency. Only topics necessitated by the emergency may be discussed or acted upon at the emergency meeting.

2. Communications Outside of Board Meetings

Communications to, by, and among a quorum of Board members outside of a legally called Board meeting, in their capacity as Board members, shall not be used for the purpose of discussing district business. This includes electronic, video or telephone communication, serial electronic communications among participants and using an intermediary to communicate among participants. Such communications among Board members shall be limited to: messages not involving deliberation, debate, decision-making or gathering of information on which to deliberate.

Communications outside of a Board meeting may contain:

- a. Communications to, between or among members of a governing body that are:

- (1) Purely factual or educational in nature and that convey no deliberation or decision on any matter that might reasonably come before the Board (including agendas and information concerning agenda items);
- (2) Not related to any matter that, at any time, could reasonably be foreseen to come before the Board for deliberation and decision; or
- (3) Nonsubstantive in nature, such as communication relating to scheduling, leaves of absence and other similar matters; or

b. Individual responses to questions posed by community members, subject to other limitations in Board policy.

3. Private or Social Meetings

Private or social meetings of a quorum of the Board for the purpose of making a decision or to deliberate toward a decision on any matter are prohibited by the Public Meetings Law.

4. Work Sessions

The Board may use regular or special meetings for the purpose of conducting work sessions to provide its members with opportunities for planning and thoughtful discussion. Work sessions will be conducted in accordance with the state law on public meetings, including notice and minutes. Generally, Boards do not take official action during work sessions, although there is no legal prohibition to do so.

5. Executive Sessions

Executive sessions may be held as an agenda item during regular, special or emergency meetings for a reason permitted by law. (See Board policy BDC - Executive Sessions)

Complaints regarding public meetings laws can be filed with the Board in accordance with Board Policy KL – Public Complaints. The Board will respond and provide a copy of the complaint and response to the Oregon Government Ethics Commission within 21 days in accordance with state law.⁶

Mandatory Training

Every member of the Board shall attend or view a training on public meetings law prepared or approved by the Oregon Government Ethics Commission (OGE) at least once during the Board member's term of office and shall verify attendance in accordance with OGE procedures.

END OF POLICY

Legal Reference(s):

⁶ See House Bill 2805 (2023) Section 5(2) for requirements of the response.

[ORS Chapter 192](#)

[ORS 255.335](#)
[ORS 332.040](#) - 332.061

[ORS 433.835](#) - 433.875

Americans with Disabilities Act of 1990, 42 U.S.C. §§ 12101-12213 (2018); 29 C.F.R. Part 1630 (2020); 28 C.F.R. Part 35 (2020).

Americans with Disabilities Act Amendments Act of 2008, 42 U.S.C. §§ 12101-12133 (2018).

OR. ATTY. GEN. Public Records and Meetings Manual.

[House Bill 2805](#) (2023).

Cross Reference(s):

ACA - Americans with Disabilities Act

BDC - Executive Sessions

DELETED

Medford School District 549C

Code: BDC
Adopted: 12/12/16
Revised/Readopted: 3/11/19; 1/22/20; 10/19/23
Orig. Code(s): BDC

Executive Sessions

The Board may, with appropriate notice, meet in executive session to discuss subjects allowed by statute but may not take final action except for the expulsion of a student and matters pertaining to or examination of the confidential records of the student.

An executive session may be included as an agenda item of an existing meeting or held as its own meeting. Proper notice is required.

If open session is held prior to the executive session, the presiding officer will announce the executive session by identifying the authorization under Oregon Revised Statute (ORS) 192.660 or ORS 332.061 for holding such session and by noting the subject of the executive session.

The Board may hold an executive session:

1. To consider the employment of a public officer, employee, staff member or individual agent.¹ (ORS 192.660(2)(a))
2. To consider the dismissal or disciplining of, or to hear complaints or charges brought against, a public officer², employee, staff member or individual agent who does not request an open hearing. (ORS 192.660(2)(b))
3. To conduct deliberations with persons designated by the governing body to carry on labor negotiations. (ORS 192.660(2)(d))
4. To conduct deliberations with persons designated by the governing body to negotiate real property transactions. (ORS 192.660(2)(e))
5. To consider information or records that are exempt by law from public inspection. (ORS 192.660(2)(f))

¹ This provision does not apply to the filling of a vacancy in elective office or on any public committee, commission or other advisory group; or for the consideration of general employment policies. Prior to holding an executive session under ORS 192.660(2)(a), the Board must ensure

- a. The vacancy has been advertised;
- b. Regular hiring procedures have been adopted;
- c. If hiring an officer, the public has had the opportunity to comment on the employment of the officer; and
- d. If hiring a chief executive officer, the Board has adopted hiring standards, criteria and policy directives in meetings open to the public in which the public has had the opportunity to comment on the standards, criteria and policy directives.

² To determine whether the individual involved is considered a public officer, consult with legal counsel.

6. To consult with counsel concerning the legal rights and duties of a public body with regard to current litigation or litigation likely to be filed. (ORS 192.660(2)(h))
7. To review and evaluate the employment-related performance of the chief executive officer of any public body, a public officer, employee or staff member who does not request an open hearing. (ORS 192.660(2)(i))
8. To consider matters relating to school safety or a plan that responds to safety threats made toward a school. (ORS 192.660(2)(k))
9. To consider matters relating to the safety of the governing body and of public body staff and volunteers and the security of public body facilities and meeting spaces. (ORS 192.660(2)(o))
10. To consider matters relating to cyber security infrastructure and responses to cyber security threats. (ORS 192.660(2)(p))
11. To review the expulsion of a minor student from a public elementary or secondary school. (ORS 332.061(1)(a))
12. To review matters pertaining to or examination of the confidential records of a student. (ORS 332.061(1)(b))

Members of the press may attend executive sessions except those matters pertaining to:

1. Deliberations with persons designated by the Board to carry on labor negotiations;
2. Hearings on the expulsion of a minor student; or examination of the confidential records of a student; and
3. Current litigation or litigation likely to be filed if the member of the news media is a party to the litigation or is an employee, agent or contractor of a news media organization that is a party to the litigation.

If an executive session is held pursuant to ORS 332.061, the following shall not be made public: the name of the minor student; the issue, including the student's confidential records; the discussion; and each Board member's vote on the issue.

Minutes shall be kept for all executive sessions.

Content discussed in executive sessions is confidential except as provided by law. Board members and the media are instructed not to disclose information obtained in executive session except when specifically authorized to do so or as required by law.

END OF POLICY

Legal Reference(s):

[ORS 192.660](#)

[ORS 332.045](#)

[ORS 332.061](#)

OR. ATTY. GEN. Public Records and Meetings Manual.

Oregon Government Ethics Commission, [Staff Advisory Opinion](#) No. 22-106S

[House Bill 2806](#) (2023)

Cross Reference(s):

BDDG - Minutes of Board Meetings

CBG - Evaluation of the Superintendent

DELETED

Medford School District 549C

Code: BDC
Adopted: xx/xx/xx

Executive Sessions

The Board may meet in executive session to discuss subjects allowed by statute under Oregon Revised Statute (ORS) 192.660 or ORS 332.061 but may not take final action in executive session except for the expulsion of a student and matters pertaining to or examination of the confidential records of the student in accordance with ORS 332.061.

An executive session may be included as an agenda item of a meeting open to the public in accordance with Board policy BDDC - Board Meeting Agenda or held as its own meeting. Public notice is required as outlined in Board policy BD – Board Meetings, Notices and Communications.

If an executive session is held as part of a meeting open to the public, the Board chair will announce the executive session in compliance with Board policy BD – Board Meetings, Notices and Communications and include and identify the appropriate statutory citation, appropriate subsection and the paragraph authorizing the session under ORS 192.660 or ORS 332.061 for holding such session and by noting the general subject of the executive session.

Example:

“The Board will now meet in executive session under ORS 192.660(2)(a) to consider the employment of a public officer, employee, staff member or individual agent.”

Prior to or at the beginning of the executive session, the Board chair may read the following¹:

“Representatives of the news media and designated staff shall be allowed to attend the executive session. All other members of the audience are asked to leave the room. Representatives of the news media are specifically directed not to report on or otherwise disclose any of the deliberations or anything said about these subjects during the executive session, except to state the general subject of the session as previously announced. No decision may be made in executive session. At the end of the executive session, we will return to open session and welcome the audience back into the room.”

The Board may hold an executive session:

1. To consider the employment of a public officer, employee, staff member or individual agent; may not include a discussion or negotiation of compensation (including salaries and benefits).²

¹ This statement should be amended if ORS 192.660 does not require that representatives of the news media be allowed to attend, ORS 332.061 allows the Board to vote in executive session, or the Board will not be returning to open session following the executive session. This statement can also be included on the agenda.

² This provision does not apply to the filling of a vacancy in elective office or on any public committee, commission or other advisory group; or for the consideration of general employment policies. It also does not apply to the employment of the chief executive officer, other public officers, employees and staff members of the district unless:

(ORS 192.660(2)(a))

2. To consider the dismissal or disciplining of, or to hear complaints or charges brought against, a public officer³, employee, staff member or individual agent who does not request an open hearing⁴; may not include a discussion or negotiation of compensation (including salaries and benefits). (ORS 192.660(2)(b))
3. To conduct deliberations with persons designated by the governing body to carry on labor negotiations. (ORS 192.660(2)(d))
4. To conduct deliberations with persons designated by the governing body to negotiate real property transactions. (ORS 192.660(2)(e))
5. To consider information or records that are exempt by law from public inspection.⁵ (ORS 192.660(2)(f))
6. To consult with counsel concerning the legal rights and duties of a public body with regard to current litigation or litigation likely to be filed.⁶ (ORS 192.660(2)(h))
7. To review and evaluate the employment-related performance of the chief executive officer of any public body, a public officer, employee or staff member who does not request an open hearing⁷; may

-
- a. The vacancy has been advertised;
 - b. Regular hiring procedures have been adopted;
 - c. If hiring an officer, the public has had the opportunity to comment on the employment of the officer; and
 - d. If hiring a chief executive officer, the Board has adopted hiring standards, criteria and policy directives in meetings open to the public in which the public has had the opportunity to comment on the standards, criteria and policy directives.

³ To determine whether the individual involved is considered a public officer, consult with legal counsel.

⁴ Notice must be provided to the public officer, employee, staff member or individual agent in accordance with OAR 199-0040-0030. The public official must receive written notice of the meeting no less than one business day or 24 hours, whichever is greater, in advance of the meeting. The notice must include:

- a. Identification of the governing body before which the matter will be considered (the Board);
- b. The time, date and location of the meeting;
- c. The purpose for which the governing body proposes to convene the executive session, including the citation to the applicable section of ORS 192.660 and the fact that the governing body will be considering the dismissal or disciplining of, hearing complaints or charges against, or reviewing and evaluating the performance of the public official receiving the notice; and
- d. Information on how the public official may make a request for an open hearing.

⁵ Consider including a reference to the law that exempts the information or records from public inspection in the notice.

⁶ Legal counsel must be present in the executive session, either in-person or via electronic or telephonic communications.

⁷ Notice must be provided to the chief executive officer, public officer, employee or staff member in accordance with OAR 199-0040-0030. The public official must receive written notice of the meeting no less than one business day or 24 hours, whichever is greater, in advance of the meeting. The notice must include:

- a. Identification of the governing body before which the matter will be considered (the Board);
- b. The time, date and location of the meeting;

not include a discussion or negotiation of compensation (including salaries and benefits or a general evaluation of an agency, goal, objective or operation or any directive to personnel concerning agency goals, objectives, operations or programs.
(ORS 192.660(2)(i))

8. To consider matters relating to school safety or a plan that responds to safety threats made toward a school. (ORS 192.660(2)(k))
9. To consider matters relating to the safety of the governing body and of public body staff and volunteers and the security of public body facilities and meeting spaces. (ORS 192.660(2)(o))
10. To consider matters relating to cyber security infrastructure and responses to cyber security threats. (ORS 192.660(2)(p))
11. To review the expulsion of a minor student from a public elementary or secondary school. (ORS 332.061(1)(a))
12. To review matters pertaining to or examination of the confidential records of a student. (ORS 332.061(1)(b))

Members of the press may attend executive sessions except those matters pertaining to:

1. Deliberations with persons designated by the Board to carry on labor negotiations;
2. Hearings on the expulsion of a minor student or examination of the confidential records of a student; and
3. Current litigation or litigation likely to be filed if the member of the news media is a party to the litigation or is an employee, agent or contractor of a news media organization that is a party to the litigation.

If an executive session is held pursuant to ORS 332.061, the following shall not be made public: the name of the minor student; the issue, including the student's confidential records; the discussion; and each Board member's vote on the issue.

Recordings or minutes shall be kept for all executive sessions in accordance with state law and Board policy – BDDG – Recordings and Minutes of Board Meetings.

Content discussed in executive sessions and recordings or minutes for executive sessions are confidential except as provided by law. Board members, district employees and the media are instructed not to disclose information obtained in executive session except when specifically authorized to do so or as required or allowed by law.

-
- c. The purpose for which the governing body proposes to convene the executive session, including the citation to the applicable section of ORS 192.660 and the fact that the governing body will be considering the dismissal or disciplining of, hearing complaints or charges against, or reviewing and evaluating the performance of the public official receiving the notice; and
 - d. Information on how the public official may make a request for an open hearing.

END OF POLICY

Legal Reference(s):

[ORS 192.660](#)
[ORS 192.685](#)
[ORS 192.705](#)
[ORS 332.045](#)

[ORS 332.061](#)
[OAR 199-040-0015 - 0060](#)
[OAR 199-050-0015](#)
[OAR 199-050-0040](#)

[OAR 199-050-0050](#)
[OAR 199-050-0060](#)

OR. ATTY. GEN. *Public Records and Meetings Manual*.

OREGON GOVERNMENT ETHICS COMMISSION, [Staff Advisory Opinion](#) No. 22-106S

DRAFT

Medford School District 549C

Code: BDD
Adopted: 9/15/09
Revised/Readopted: 3/11/19
Orig. Code(s): BDD

Board Meeting Procedures

1. Quorum

A quorum will consist of the majority of the Board members.

2. Vote Needed for Exercise of Powers

The affirmative vote of a majority of Board members will be necessary for exercising any of the Board's powers.

3. Board Member Voting

Each member's vote on all motions will be recorded in the minutes.

4. Abstaining From Vote

If a Board member chooses to abstain from voting, such abstention and reason for abstaining will be recorded.

5. Parliamentary Procedure

Official Board business will be transacted by motion or resolution at duly called regular, special or emergency meetings.

Except as otherwise provided by state law and/or Board policy, the rules of parliamentary procedure comprised in *Robert's Rules of Order, Newly Revised*, "Procedure in small boards" will govern the Board in its deliberation. Modifications will include the following:

- a. Motions to close or limit debate will be acceptable;
- b. Motions will all be seconded prior to consideration for discussion by the Board.

The chair will decide all questions relative to points of order, subject to an appeal to the Board.

END OF POLICY

Legal Reference(s):

[ORS 192.650](#)
[ORS 244.120\(2\)](#)

[ORS 332.045](#)
[ORS 332.055](#)

[ORS 332.057](#)
[ORS 332.107](#)

38 OR. ATTY. GEN. OP. 1995 (1978)
41 OR. ATTY. GEN. OP. 28 (1980)

DELETED

Medford School District 549C

Code: BDD
Adopted: xx/xx/xx

Board Meeting Procedures

1. Quorum

A quorum of the Board is [four^{1}] Board members.

2. Vote Needed for Exercise of Powers

The affirmative vote of [four^{2}] Board members will be necessary for exercising any of the Board's powers. All votes of the Board shall be taken by public vote, except when authorized in executive session under Oregon Revised Statute (ORS) 332.061.

3. Board Member Voting

The results of all votes shall be recorded, including the vote of each member's vote by name, on all votes taken by the Board. A written ballot, if used, shall identify the individual Board member by name and their vote, and shall be announced during the meeting at which the vote occurred. Secret ballots are prohibited.

4. Abstaining from Vote

Any conflicts of interest will be handled in accordance with ORS 244.120 and Board policy BBFA – Board Member Ethics and Conflicts of Interest. Board member abstentions will be documented in the meeting minutes or recording.

5. Parliamentary Procedure

Official Board business will be transacted by motion or resolution at properly noticed³ meetings.

Except as otherwise provided by state law and/or Board policy, the rules of parliamentary procedure comprised in *Robert's Rules of Order Newly Revised*, "Procedure in Small Boards"⁴ as modified by the Board will govern the Board in its deliberation. Modifications include the following: Motions

¹ {ORS 332.055 establishes the quorum as a majority. If the Board has five members, three constitute a quorum. If the Board has seven members, four constitute a quorum. If the Board has nine members, five constitute a quorum.}

² {ORS 332.055 provides "the affirmative vote of the majority of members of the board is required to transact any business." If the Board has five members, three votes are required. If the Board has seven members, four votes. If the Board has nine members, five votes.}

³ See ORS 192.640, OAR 199-050-0040 and Board policy BD/BDA – Board Meetings for notice requirements. {In the June 2026 policy update, OSBA will be recommending policy BD/BDA be recoded and renamed: BD – Board Meetings, Notices and Communications.}

⁴ See *Robert's Rules of Order*, 12th Edition, § 49:21.

will all be seconded prior to consideration for discussion by the Board and motions to close or limit debate will be acceptable.

The Board chair will decide all questions relative to points of order, subject to an appeal to the Board.

Failure to follow *Robert's Rules of Order* will not invalidate a lawful Board decision.

END OF POLICY

Legal Reference(s):

[ORS 192](#).650

[ORS 244](#).120(2)

[ORS 332](#).045

[ORS 332](#).055

[ORS 332](#).057

[ORS 332](#).107

[OAR 199](#)-050-0005 (9)

[OAR 199](#)-050-0055

38 OR. ATTY. GEN. OP. 1995 (1978)

41 OR. ATTY. GEN. OP. 28 (1980)

Medford School District 549C

Code: BDD
Adopted: xx/xx/xx

Board Meeting Procedures

1. Quorum

A quorum of the Board is four Board members.

2. Vote Needed for Exercise of Powers

The affirmative vote of four Board members will be necessary for exercising any of the Board's powers. All votes of the Board shall be taken by public vote, except when authorized in executive session under Oregon Revised Statute (ORS) 332.061.

3. Board Member Voting

The results of all votes shall be recorded, including the vote of each member's vote by name, on all votes taken by the Board. A written ballot, if used, shall identify the individual Board member by name and their vote, and shall be announced during the meeting at which the vote occurred. Secret ballots are prohibited.

4. Abstaining from Vote

Any conflicts of interest will be handled in accordance with ORS 244.120 and Board policy BBFA – Board Member Ethics and Conflicts of Interest. Board member abstentions will be documented in the meeting minutes or recording.

5. Parliamentary Procedure

Official Board business will be transacted by motion or resolution at properly noticed¹ meetings.

Except as otherwise provided by state law and/or Board policy, the rules of parliamentary procedure comprised in *Robert's Rules of Order Newly Revised*, "Procedure in Small Boards"² as modified by the Board will govern the Board in its deliberation. Modifications include the following: Motions will all be seconded prior to consideration for discussion by the Board and motions to close or limit debate will be acceptable.

The Board chair will decide all questions relative to points of order, subject to an appeal to the Board.

Failure to follow *Robert's Rules of Order* will not invalidate a lawful Board decision.

¹ See ORS 192.640, OAR 199-050-0040 and Board policy BD/BDA – Board Meetings for notice requirements.

² See *Robert's Rules of Order*, 12th Edition, § 49:21.

END OF POLICY

Legal Reference(s):

[ORS 192.650](#)
[ORS 244.120\(2\)](#)
[ORS 332.045](#)

[ORS 332.055](#)
[ORS 332.057](#)
[ORS 332.107](#)

[OAR 199-050-0005 \(9\)](#)
[OAR 199-050-0055](#)

38 OR. ATTY. GEN. OP. 1995 (1978)
41 OR. ATTY. GEN. OP. 28 (1980)

DRAFT

Medford School District 549C

Code: BDDC
Adopted: 9/15/09
Revised/Readopted: 3/11/19
Orig. Code(s): BDDC

Board Meeting Agenda

The Board chair and the superintendent will prepare an agenda for all regular meetings of the Board. Items of business may be suggested by any Board member, staff member, student or community member by notifying the superintendent or Board chair at least 10 working days prior to the meeting.

A consent agenda may be used by the Board for noncontroversial business. The consent agenda will consist of routine business that requires action but not necessarily discussion. These items may all be approved at the same time. A Board member may ask that any item be removed from the consent agenda. The removed item will then be placed on the action agenda.

The agenda will follow a general order established by board resolution. Opportunities for the audience to be heard may be included. The Board will follow the order of business set up by the agenda unless the order is altered by a consensus of the Board.

Items of business not on the agenda may be discussed and acted upon if the majority of the Board agrees to consider them.

The agenda, together with supporting materials, will be distributed to Board members at least three days prior to the meeting. The agenda will be available to the press and to interested patrons through the superintendent's office at the same time it is available to the Board members. Copies of the agenda for the press and public will not contain any confidential information included in the Board members' packets.

A copy of the agenda will be posted on the district website on the day of the meeting. Members of the public may request a copy of the agenda at the superintendent's office. Minutes from board work sessions and from regular or special board meetings shall be available at the district office and on the district website after approval by the Board.

The district will ensure equally effective communications are provided to qualified persons with disabilities upon request as required by the Americans with Disabilities Act.

Appropriate auxiliary aids and services may include, but are not limited to, qualified interpreters, assistive listening systems, note takers, large print, Braille materials, audio recordings, and readers. Primary consideration will be given to the request of the person with a disability in the selection of the appropriate auxiliary aid and/or service.

Should the Board demonstrate that such a request would result in a fundamental alteration in the service, program, or activity, or an undue financial and administrative burdens, an alternate equally effective communications will be used.

Auxiliary aids and services for persons with disabilities will be available at no charge to the individual.

END OF POLICY

Legal Reference(s):

[ORS 192.630](#)

[ORS 192.640](#)

Americans with Disabilities Act of 1990, 42 U.S.C. §§ 12101-12213 (2012); 29 C.F.R. Part 1630 (2015); 28 C.F.R. Part 35 (2015).

Americans with Disabilities Act Amendments Act of 2008.

DELETED

Medford School District 549C

Code: BDDC
Adopted: xx/xx/xx

Board Meeting Agenda

{¹} The Board chair will direct the preparation of an agenda for all meetings of the Board. The Board chair may seek assistance from the superintendent or another Board member. Items of business may be suggested by any Board member, staff member, student or patron of the district by notifying the Board chair or superintendent at least 10 working days prior to the meeting. The agenda will include the principal subjects anticipated to be considered at the meeting and be specific enough to permit the public to recognize the matters in which they are interested. When the agenda includes an executive session, the agenda shall identify the specific statutory citation and appropriate subsection and paragraph authorizing the executive session, as well as a general description of the statutory authorization. (See Board policy BDC – Executive Sessions for additional information.)

The Board chair may direct an amendment to the agenda until it is posted, including adding or removing items. The Board may also amend the agenda during a meeting by a majority vote of the Board. This includes adding items to the agenda during the meeting.

A consent agenda may be used by the Board. The consent agenda will consist of routine business that requires action but not necessarily discussion. These items may all be voted on and approved at the same time. An item on the consent agenda will be removed from the consent agenda upon request of a Board member prior to the consent agenda's consideration. The item removed from the consent agenda will then be placed on the regular agenda.

The agenda, together with supporting materials, will be distributed to Board members at least three full working days prior to the meeting. A copy of the agenda will be posted on the district website at least 48 hours prior to any regular meeting and 24 hours prior to any special meeting.

Copies of the agenda for the press and public will not contain any confidential information included in Board member packets.

END OF POLICY

Legal Reference(s):

¹ {The Board is encouraged to review current practices for agenda preparation and Public Meetings Law.}

[ORS 192.630](#)

[ORS 192.640](#)

[OAR 199-050-0040](#)

Americans with Disabilities Act/Americans with Disabilities Act Amendments Act, 42 U.S.C. §§ 12101-12213 (2018); 29 C.F.R. Part 1630 (2020); 28 C.F.R. Part 35 (2020).

Medford School District 549C

Code: BDDC
Adopted: xx/xx/xx

Board Meeting Agenda

The Board chair will direct the preparation of an agenda for all meetings of the Board. The Board chair may seek assistance from the superintendent or another Board member. Items of business may be suggested by any Board member, staff member, student or patron of the district by notifying the Board chair or superintendent at least 10 working days prior to the meeting. The agenda will include the principal subjects anticipated to be considered at the meeting and be specific enough to permit the public to recognize the matters in which they are interested. When the agenda includes an executive session, the agenda shall identify the specific statutory citation and appropriate subsection and paragraph authorizing the executive session, as well as a general description of the statutory authorization. (See Board policy BDC – Executive Sessions for additional information.)

The Board chair may direct an amendment to the agenda until it is posted, including adding or removing items. The Board may also amend the agenda during a meeting by a majority vote of the Board. This includes adding items to the agenda during the meeting.

A consent agenda may be used by the Board. The consent agenda will consist of routine business that requires action but not necessarily discussion. These items may all be voted on and approved at the same time. An item on the consent agenda will be removed from the consent agenda upon request of a Board member prior to the consent agenda's consideration. The item removed from the consent agenda will then be placed on the regular agenda.

The agenda, together with supporting materials, will be distributed to Board members at least three full working days prior to the meeting. A copy of the agenda will be posted on the district website at least 48 hours prior to any regular meeting and 24 hours prior to any special meeting.

Copies of the agenda for the press and public will not contain any confidential information included in Board member packets.

END OF POLICY

Legal Reference(s):

[ORS 192.630](#)

[ORS 192.640](#)

[OAR 199-050-0040](#)

Americans with Disabilities Act/Americans with Disabilities Act Amendments Act, 42 U.S.C. §§ 12101-12213 (2018); 29 C.F.R. Part 1630 (2020); 28 C.F.R. Part 35 (2020).

Medford School District 549C

Code: BDDG
Adopted: 12/04/79
Readopted: 11/03/09; 3/11/19; 1/22/20

Minutes of Board Meetings

The Board shall provide for the taking of written minutes of all its meetings. Neither a full transcript nor a recording of the meeting is required, except as otherwise provided by law, but the written minutes must give a true reflection of the matters discussed at the meeting and the views of the participants.

All minutes shall be available to the public within a reasonable time after the meeting, and shall include at least the following information:

1. All members of the governing body present;
2. All motions, proposals, and resolutions and their disposition;
3. The results of all votes, and the vote of each member by name;
4. The substance of any discussion on matter;
5. Any other information required by law (Oregon Revised Statute (ORS) 192.410 - 192.500).

Minutes of executive sessions will be kept in accordance with the requirements of Oregon's Public Meetings Law with essentially the same level of detail as for public sessions. If disclosure of material in the executive session minutes would be inconsistent with the purpose for which executive session was held under ORS 192.660, the material may be withheld from disclosure.

If an executive session is held pursuant to ORS 332.061, the following shall not be made public: the name of the minor student; the issue, including a student's confidential records; the discussion; and each Board member's vote on the issue.

END OF POLICY

Legal Reference(s):

[ORS 192.610](#) to [-192.710](#)
[ORS 332.061](#)
House Bill 2514 (2019)

Letter Opinion, Office of the OR Attorney General (Nov. 20, 1970).

Medford School District 549C

Code: BDDG
Adopted: xx/xx/xx

Recordings and Minutes of Board Meetings

{¹} The Board will ensure a {²} video recording is made of all of its meetings and portions of meetings that are not held in executive session. These recordings will be posted on the district's website or social media site within seven days following the meeting.

A video or audio recording of a meeting can be kept as the official record as long as all required content is included and it is kept in an allowable format³. Alternatively, the district may create written minutes. Written minutes do not need to be a verbatim transcript and can be kept in hard copy or electronic form⁴.

The official record must give a true reflection of the matters discussed at the meeting and the views of the participants, and must include the following information:

1. All members of the Board present;
2. All motions, proposals, resolutions, orders, ordinances and measures proposed and their disposition;
3. The results of all votes and the vote of each member by name for all actions taken⁵;
4. The substance of any discussion on any matter; and
5. A reference to any document discussed at the meeting.

If written minutes are created for meetings which do not take place in executive session, those minutes shall be available to the public within a reasonable time {⁶} after the meeting. These minutes will be published to the district website and may be requested from the district office.

¹ {ORS 192.655 requires districts with an ADMr of 50 or more to record board meetings, and post the recording within seven days. Districts with fewer than 50 ADMr are exempt from this requirement and do not need to adopt this language.}

² {If the district lacks broadband internet, an audio recording is sufficient. See ORS 192.655.}

³ Oregon Administrator Rule (OAR) 166-017-0045(4) requires moving images or audio recordings be kept in MP2, MP3, MP4, or WAVE formats.

⁴ Oregon Administrator Rule (OAR) 166-017-0045(4) requires textual data or still images be kept in XML, ODT, TXT, PDF, RTF, PREG, JFIF, PNG, or TIFF formats.

⁵ If minutes are kept in a recorded form, all voting will use a roll call vote and if minutes are kept in written form the minutes will identify the vote of each member by name under each board action.

⁶ {The Oregon Attorney General's *Public Records and Meetings Manual* says, "three weeks arguably is within the reasonable time allowed by statute."}

Recordings or minutes⁷ of executive sessions will be kept in the same manner as other meetings of the Board. If disclosure of material from executive session recordings or minutes would be inconsistent with the purpose for which executive session was held under Oregon Revised Statute (ORS) 192.660, the material may be withheld from disclosure. Executive session minutes of a hearing held under ORS 332.061 shall contain only material not excluded under ORS 332.061(2) and information⁸ will not be disclosed in accordance with ORS 332.061.

Either the recording or minutes of Board meetings will be kept permanently. If written minutes are created for any meetings of the Board, any recordings will be kept for at least one year after the minutes are created.

END OF POLICY

Legal Reference(s):

⁷ “...a record of any executive session may be kept in the form of a sound or video tape or digital recording, which need not be transcribed unless otherwise provided by law.” ORS 192.650(2)

⁸ ORS 332.061 prohibits the disclosure of:

1. The name of the minor student;
2. The issue, including a student’s confidential records;
3. The discussion; and
4. The school board member’s vote on the issue.

[ORS 192](#).610 - 192.705
[ORS 332](#).061

[OAR 166](#)-017-0005 - 0095
[OAR 166](#)-400-0010(9)

[OAR 199](#)-050-0060

Attorney General's PUBLIC RECORDS AND MEETINGS MANUAL.

Medford School District 549C

Code: BDDG
Adopted: xx/xx/xx

Recordings and Minutes of Board Meetings

The Board will ensure a video recording is made of all of its meetings and portions of meetings that are not held in executive session. These recordings will be posted on the district's website or social media site within seven days following the meeting.

A video or audio recording of a meeting can be kept as the official record as long as all required content is included and it is kept in an allowable format¹. Alternatively, the district may create written minutes. Written minutes do not need to be a verbatim transcript and can be kept in hard copy or electronic form².

The official record must give a true reflection of the matters discussed at the meeting and the views of the participants, and must include the following information:

1. All members of the Board present;
2. All motions, proposals, resolutions, orders, ordinances and measures proposed and their disposition;
3. The results of all votes and the vote of each member by name for all actions taken³;
4. The substance of any discussion on any matter; and
5. A reference to any document discussed at the meeting.

If written minutes are created for meetings which do not take place in executive session, those minutes shall be available to the public within a reasonable time after the meeting. These minutes will be published to the district website and may be requested from the district office.

Recordings or minutes⁴ of executive sessions will be kept in the same manner as other meetings of the Board. If disclosure of material from executive session recordings or minutes would be inconsistent with the purpose for which executive session was held under Oregon Revised Statute (ORS) 192.660, the material may be withheld from disclosure. Executive session minutes of a hearing held under ORS

¹ Oregon Administrator Rule (OAR) 166-017-0045(4) requires moving images or audio recordings be kept in MP2, MP3, MP4, or WAVE formats.

² Oregon Administrator Rule (OAR) 166-017-0045(4) requires textual data or still images be kept in XML, ODT, TXT, PDF, RTF, PREG, JFIF, PNG, or TIFF formats.

³ If minutes are kept in a recorded form, all voting will use a roll call vote and if minutes are kept in written form the minutes will identify the vote of each member by name under each board action.

⁴ "...a record of any executive session may be kept in the form of a sound or video tape or digital recording, which need not be transcribed unless otherwise provided by law." ORS 192.650(2)

332.061 shall contain only material not excluded under ORS 332.061(2) and information⁵ will not be disclosed in accordance with ORS 332.061.

Either the recording or minutes of Board meetings will be kept permanently. If written minutes are created for any meetings of the Board, any recordings will be kept for at least one year after the minutes are created.

END OF POLICY

Legal Reference(s):

⁵ ORS 332.061 prohibits the disclosure of:

1. The name of the minor student;
2. The issue, including a student's confidential records;
3. The discussion; and
4. The school board member's vote on the issue.

[ORS 192](#).610 - 192.705
[ORS 332](#).061

[OAR 166](#)-017-0005 - 0095
[OAR 166](#)-400-0010(9)

[OAR 199](#)-050-0060

Attorney General's PUBLIC RECORDS AND MEETINGS MANUAL.

DRAFT

Medford School District 549C

Code: BG
 Adopted: 2/16/10
 Revised/Readopted: 3/11/19; 10/17/24; xx/xx/xx
 Orig. Code(s): BG

Board-Staff Communications

The Board desires to maintain open channels of communication between itself and the district staff. The basic line of communication will, however, be through the superintendent.

Staff Communications to the Board

All formal communications or reports to the Board or any Board committee from staff members should be submitted through the superintendent. This procedure will not be construed as denying the right of any employee to address the Board about issues which are neither part of an active administrative procedure, nor disruptive to the operation of the district. In addition, this procedure does not restrict protected labor relations communications of bargaining unit members. Staff members are invited to Board meetings which provide an opportunity to observe the Board's deliberations on matters of district operation.

Board Communications to Staff

All official communications, policies, and directives of staff interest and concern will be communicated to staff members through the superintendent. The superintendent will provide appropriate communication to keep staff fully informed of the Board's policies, priorities and actions.

Visits to Schools

Official school visits by Board members shall be regarded as informal expressions of interest in school affairs and not as "inspections" or visits for supervisory or administrative purposes. Board members will coordinate with the Board secretary 24 hours in advance and provide the estimated amount of time expected for the visit ([not to exceed 1.5 hours](#)), as well as the purpose. The Board secretary will notify the principal as soon as possible, prior to school visits. [The Board secretary will inform the other Board members of the request and attempt to coordinate the requested visit so that two to three Board members are able to attend the requested visit, if possible. This does not include officially scheduled Board events organized by the superintendent.](#)

END OF POLICY

Legal Reference(s):

[ORS 332.107](#)

[OAR 581-022-2405](#)

Anderson v. Central Point Sch. Dist., 746 F.2d 505 (9th Cir. 1984).

Connick v. Myers, 461 U.S. 138 (1983).

Lebanon Education Association/OEA v. Lebanon Community School District, 22 PECBR 323 (2008).

Cross Reference(s):

GBD - Board-Staff Communications

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Cross Reference(s):

GBD - Board-Staff Communications

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EXECUTIVE SUMMARY

Meeting Date:	June 18, 2026
Agenda Item:	Board Officer Elections
Item Type:	Action
Administrator:	Kendell Ferguson
Objective:	Elect Board Chair and Vice Chair for the 2026-27 school year

Background: Policy BCB states “the Board will elect one of its members to serve as chair and one to serve as vice chair for a term of one year.” A majority of votes (four) is required for the nominee to be elected.

Additional Materials: None

Recommendation: Open the floor for nominations and elect Board Chair and Vice Chair of the Medford School Board for the 2026-27 school year.

Suggested Nomination: “I nominate _____ for the office of **School Board Chair** for the 2026-27 school year.” (no second required)

“I nominate _____ for the office of **School Board Vice Chair** for the 2026-27 school year.” (no second required)

2026-2027 Board Meeting Calendar

DRAFT

www.medford.k12.or.us

Phone: 541-842-3636

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July 2026						
Su	M	Tu	W	Th	F	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

July 3 Independence Day (Observed) - District Closed

August 2026						
Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Aug 20 & 21 New Teacher Pre-Inservice Days
Aug 24-27 Inservice & Planning- No Students
Aug 28 Some staff per contracts - No Students
Aug 31 First Day of Instruction for designated students*
Aug 31 KG Soft Start Week Begins

September 2026						
Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Sep 1 First Day of Instruction for 7th, 8th, 10th - 12th
Sep 1-3 Kindergarten Soft Start Week Continues
Sep 4 Schools Closed - Some staff per contracts
Sep 7 Labor Day - District Closed
Sep 8 Full Day for Kindergarten Begins

October 2026						
Su	M	Tu	W	Th	F	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Oct 2 Mid-Quarter - No Students
Oct 9 Statewide Inservice Day - Schools Closed
Oct 30 End of First Quarter

November 2026						
Su	M	Tu	W	Th	F	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Nov 2 Grading Day - No Students
Nov 11 Veterans Day - District Closed
Nov 23-24 Conference Days - No Students
Nov 25-27 Thanksgiving Break - District Closed

December 2026						
Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Dec 11 Mid-Quarter - No Students
Dec 21-Jan 1 Winter Break - Schools Closed
Dec 24 Christmas Eve - District Closed
Dec 25 Christmas Day - District Closed

January 2027						
Su	M	Tu	W	Th	F	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Jan 1 New Year's Day - District Closed
Jan 4 Classes Resume
Jan 18 Martin Luther King Jr. Day - District Closed
Jan 22 End of Second Quarter
Jan 25 Grading Day - No Students

February 2027						
Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28						

Feb 15 President's Day - District Closed

March 2027						
Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Mar 1 Mid-Quarter - No Students
Mar 22-26 Spring Break - Schools Closed

April 2027						
Su	M	Tu	W	Th	F	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Apr 2 End of Third Quarter
Apr 5 Grading Day - No Students
Apr 23 Schools Closed - Some staff per contracts
& Snow Make-Up Day (if needed)

May 2027						
Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

May 10 Mid-Quarter - No Students
May 31 Memorial Day - District Closed

June 2027						
Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Jun 2 IA Graduation Ceremony
Jun 3 NMHS Graduation Ceremony
Jun 4 SMHS Graduation Ceremony
Jun 10 End of Fourth Quarter/ Last Day of School
Jun 11 Grading/Pack-up Day - No Students
Jun 14-15 Snow Make-up Days (if needed)
Jun 18 Juneteenth (Observed) - District Closed

No Students - Offices Open
Schools Closed - Some staff per contracts
District Closed - Holiday/Non-Contract Day
Conference Days - Non-School Day
*Elementary grades 1-5. Kindergarten Soft Start and Orientation Day for 6th and 9th grade

Inservice / New Teacher Orientation Days
Reserved for Snow Make-up Day & Some staff per contracts
First Day for designated students / Last Day of School
Mid-Quarter - Grading/Professional Development Day
End of Quarter

EXECUTIVE SUMMARY

Meeting Date:	June 18, 2026
Agenda Item:	Board Meeting Calendar
Item Type:	Action
Administrator:	Jeanne Grazioli, Kendell Ferguson
Objective:	Review and approve the Board meeting calendar

Background: Board policy BC/BCA requires adoption of the Board meeting calendar in a public meeting. It is recommended to keep the work sessions and regular meetings on Thursdays, with a work session the first meeting of the month, and a Board meeting the second meeting of the month, September 2026 through June 2027. The months of December and January will only include a regular meeting and no work session. Suggested dates are indicated with a green border on the date.

The proposed meeting dates are indicated with a green square on the first and third Thursday of each month with the exception of December and January. Due to holidays in those months, one regular meeting is proposed in the middle of each month.

Additional Materials: [Draft Board Meeting Calendar for 2026-27](#)

Recommendation: Approve the Board Meeting Calendar.

Suggested Motion: *“I move to approve the School Board meeting calendar for the 2026-27 school year as presented.”*

EXECUTIVE SUMMARY

Meeting Date:	June 18, 2026
Agenda Item:	OSEA Contract Ratification
Item Type:	Action
Administrator:	Michael Campbell
Objective:	Approve contract ratification for classified staff

Background: The current OSEA Collective Bargaining Agreement (CBA) expires on June 30, 2026. We entered into negotiations this spring and successfully came to a tentative agreement in May. The new proposed CBA's duration is from July 1, 2026-June 30, 2028.

Highlights of the contract include:

- 2-year agreement (July 1, 2026 – June 30, 2028)
- 6.25% salary schedule increase in Year 1; 0% in Year 2
- Enhanced recruitment flexibility through experience-based wage-scale placement
- Clarified emergency closure and essential employee provisions
- Updated payroll overpayment language for legal compliance
- Limited operational and procedural updates throughout the agreement

The bargaining experience with OSEA was very professional and collaborative and we appreciate our outstanding working relationship. We look forward to our continued collaboration and the shared commitment of placing students at the center of our work.

Additional Materials: OSEA final contract pending approval and signatures (To be provided prior to the meeting if ratified.)

Recommendation: Approve the contract as ratified.

Suggested Motion: *“I move to approve the July 1, 2026 - June 30, 2028 OSEA Collective Bargaining Agreement as presented.”*