



Regular Meeting OF THE BOARD OF DIRECTORS

Thursday, October 15, 2026 - 5:45 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. **Consent Agenda**
 - a. Staff Assignment Report 3
 - b. Minutes from Previous Meeting 5
 - c. Annual Designations Reassignment for 2026-27 School Year 9
4. **Board Action Items**
 - a. Decision Following Executive Session
5. **Items for Information and Discussion**
 - a. Student Report 10
 - b. District Priority: Preserve Financial Sustainability - Financial Update 11
6. **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.
7. **Recess**
8. **Items for Information and Discussion (continued)**
 - a. Superintendent Report: Quarterly Update on Goals 18
 - b. Board/Superintendent Goal: Increase Reading and Mathematics Proficiency 20
 - c. Recess
 - d. Division 22 Assurances for 2025-2026 28
 - e. Budget Committee Vacancies 45
 - f. Revise DLC-AR - Expense Reimbursement for Out-of-District Travel 47
9. **Announcements**
 - a. November 5 - Work Session at Oakdale Middle School
 - b. November 12–14 - Oregon School Boards Association Convention in Portland
10. **Adjournment**



EXECUTIVE SUMMARY

Meeting Date:	October 15, 2026
Agenda Item:	Staff Assignment Report
Item Type:	Report
Administrator:	Michael Campbell
Objective:	Approve new licensed and administrative staff

Background: Under current Board policy, one responsibility of the Board is to approve the hiring of licensed and administrative staff. The Staff Assignment Report includes that information, as well as any retirements or resignations.

Additional Materials: Staff Assignment Report

Recommendation: Administration recommends approval of the new hires.

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

Medford School District Staff Assignment
School Board Meeting, October 15, 2026

Recommendation for election to the position of Temporary Teacher for the 2026-27 school year:

Employee Name	School/Location	Position
Bailon, Melissa	Oak Grove Elementary	Third Grade Teacher *Correction
Bowden, Amanda	Howard Elementary	Special Education Teacher *Correction
Feist, Katy	McLoughlin Middle School	English Language Arts Teacher
Lemke, Cheryl	Roosevelt Elementary	First Grade Teacher
Robertson- Horner, Barbara	Oak Grove Elementary	Special Education Teacher *Correction

Retirements:

Employee Name	School/Location	Position	Effective Date
Schaan, Shellie	Jefferson Elementary	Third Grade Teacher	01-31-2027 (working back through June)



EXECUTIVE SUMMARY

Meeting Date:	October 15, 2026
Agenda Item:	Consideration for approval of minutes from previous meetings
Item Type:	Minutes
Administrator:	Jeanne Grazioli, Jodi Fahy
Objective:	Approve meeting minutes

Background: School Board policies BDDG and BDDC indicate the Board shall provide for the taking of written minutes of all its meetings, and that the minutes shall be available to the public after approval by the Board.

Additional Materials: Draft minutes for the October 1 Work Session.

Recommendation: Approve the minutes included with the consent agenda.

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



Work Session of the Board of Education

Thursday, October 1, 2026 – 5:45 PM
Oakdale Middle School, Room 230
815 S. Oakdale Ave.
Medford, OR 97501

The meeting was video recorded and 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](#). Recording timestamps are provided throughout these minutes to assist in locating presentations and discussions.

1. Call to Order / Pledge of Allegiance / Roll Call

Board Chair Kendell Ferguson called the meeting to order at 5:45 p.m., led the Pledge of Allegiance, confirmed a quorum through roll call, and welcomed attendees.

Board Members Present: Lilia Caballero, Kendell Ferguson, Erik Johnsen, Sandra LaNier McHenry, Sunny Spicer, Michael Williams, and Angela Zbikowski

2. Agenda Adjustments and Approval

The Board approved the agenda by unanimous consent.

3. Consent Agenda

Presentation — Recording timestamp: [10:47]

3.a. Staff Assignment Report

3.b. Minutes from previous Board meetings

The Board approved the Consent Agenda by unanimous consent.

4. Introduction of New MSD Leader

Presentation — Recording timestamp: [11:00]

Chief Operations Officer Kati Falger was introduced to the Board and shared information regarding her professional background and experience.

5. Work Session Items

5.a. Class Size / Enrollment Update

Presentation and Discussion — Recording timestamp: [12:14]

Executive Directors of Teaching and Learning Kirk Kolb and Jennie Snow presented the current class size and enrollment report. The presentation included elementary, middle school, and high school enrollment and class size data, enrollment trends, and transfer information.

Discussion included enrollment changes by grade level and school, transfer patterns, Innovation Academy enrollment and student outcomes, elementary school enrollment, and the relationship between enrollment and staffing.

5.b. District Priority: Preserve Financial Sustainability — School Consolidation/Closure Criteria

Presentation and Discussion — Recording timestamp: [37:33]

Superintendent Jeanne Grazioli presented information regarding declining enrollment, the district's long-term enrollment forecast, financial sustainability, and potential criteria and processes for considering school consolidation or closure.

The Board discussed the importance of a thoughtful, transparent, and student-centered process that considers financial and operational impacts, facility use, transportation, geographic considerations, existing programs, and impacts on students, staff, families, and neighborhoods. The Board identified the need for additional analysis and information, including opportunities to improve resource allocation and enrollment, before considering consolidation or closure. The proposed process includes applying agreed-upon criteria, developing scenarios, conducting an internal feasibility review, engaging the community, and bringing information back to the Board for further consideration.

The meeting was recessed. [1:41:51]

5.c. Board/Superintendent Goal: Increase Reading Proficiency K-8 — Professional Development Update

Presentation and Discussion — Recording timestamp: [1:50:40]

Chief Academic Officer Dr. Doris Ellison provided an update on literacy professional development and the district's instructional model. The presentation reviewed the eight elements of the MSD Instructional Model, research regarding effective instructional practices, current literacy professional learning, classroom implementation activities, and upcoming professional learning opportunities.

6. Announcements

6.a. October 15, 2026 — Board Meeting

The next Board meeting will be held October 15 at Oakdale Middle School, Room 230.

7. Adjournment

With no further business before the Board, the meeting was adjourned at 8:04 p.m.

DRAFT



EXECUTIVE SUMMARY

Meeting Date:	October 15, 2026
Agenda Item:	Annual Designations Reassignment for 2026-27 School Year
Item Type:	Consent Agenda
Administrator:	Jeanne Grazioli
Objective:	Assign designated district authorities and responsibilities to Chief Operations Officer Kati Falger

Background:

On September 3, 2026, the Board temporarily reassigned certain district authorities and responsibilities to Superintendent Jeanne Grazioli following the resignation of Brad Earl.

The district has since filled the position of Chief Operations Officer. The District recommends assigning Chief Operations Officer Kati Falger as Budget Officer and Custodian of Funds, with authority to sign district checks; make payments; accept quotes and award bids; execute interfund loans and/or cash advances in accordance with ORS 294.660, invest district funds, and sign contracts.

Additional Materials:

None

Recommendation:

Approve the assignment of Kati Falger as the district administrator with the authorities and responsibilities outlined in this Executive Summary.

Suggested Motion:

A formal motion is not required if approved as part of the consent agenda.



EXECUTIVE SUMMARY

Meeting Date:	October 15, 2026
Agenda Item:	Student Report
Item Type:	Informational
Administrator:	Jeanne Grazioli
Objective:	To share student perspectives on things going well, and areas that could use more attention or improvement

Background:

As part of our ongoing commitment to hearing from a variety of voices, student leaders were asked to provide updates from time to time to the Board. This is an opportunity to highlight what's working well and suggest ways the Board can continue to offer meaningful support. This month, representatives from Innovation Academy, North Medford and South Medford High Schools will share their perspectives.

Additional Materials: N/A

Recommendation: N/A

Suggested Motion: N/A



EXECUTIVE SUMMARY

Meeting Date:	October 15, 2026
Agenda Item:	District Priority: Preserve Financial Sustainability - Financial Update
Item Type:	Report
Administrator:	Jeanne Grazioli/ Kati Falger
Objective:	Provide a Financial Update Report on the District

Background:

At the October 1 Work Session, the Board engaged in discussion regarding declining enrollment, school consolidation/closure, and criteria for decision making. There were questions for follow up that will be addressed at the meeting.

The September Financial Report is also included in the Board packet for your review.

Additional Materials: [September Financial Report](#)

Recommendation: N/A

Suggested Motion: N/A

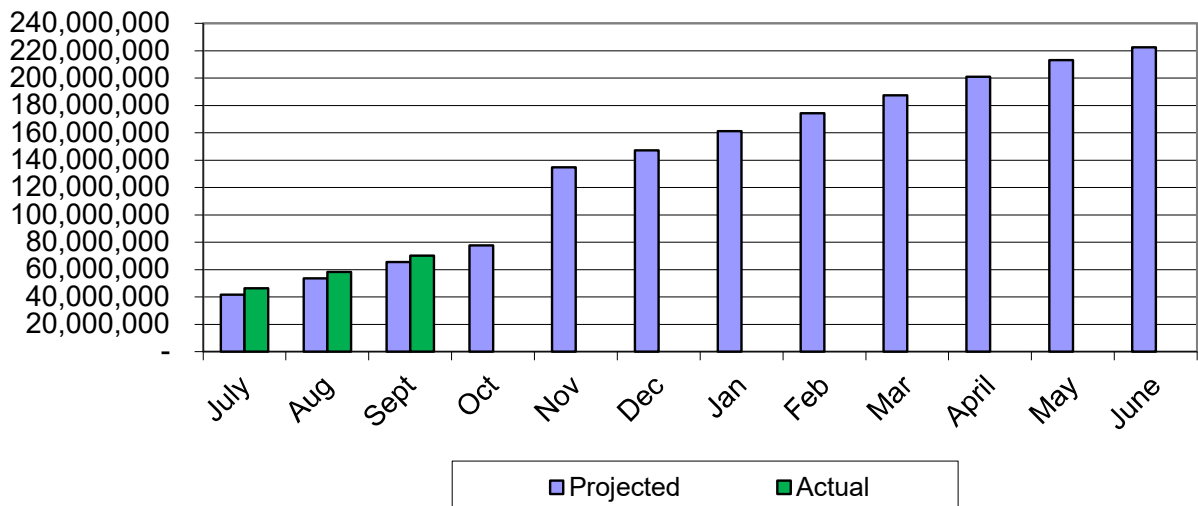
Medford School District 549C
General Fund
Statement of Resources
9/30/2026

	Budget FY 2026-27	Year-to-Date		
		Projected *	Actual 9/30/2026	Over/(under) Projection
Resources				
Local Sources	\$ 56,550,467	\$ 1,086,088	\$ 944,126	(141,962)
Intermediate Sources	\$ 3,650,000	9,500	-	(9,500)
State Sources	\$ 141,366,756	46,200,000	46,199,153	(847)
Federal Sources	\$ 130,000	29,809	89,034	59,225
Transfers In	\$ 550,000	-	-	0
Total Revenue & Transfers In	\$ 202,247,223	47,325,397	47,232,313	(93,084)
Other Income GASB 87 & 96	\$ 1,900,000	-	-	0
Beginning Balance	\$ 18,300,686	18,300,686	20,971,804	2,671,118
Total Resources	\$ 222,447,909	\$ 65,626,083	\$ 68,204,117	2,578,034

* Forecast Projection of budget by month is based on historical average in most cases with some adjustment for recent trends

Revenue is essentially on budget down \$.009 million or 0.20%. Unaudited beginning fund balance is favorable \$2.85 million primarily to favorable spending in the prior year.

Medford School District
2026-27
General Fund Resources



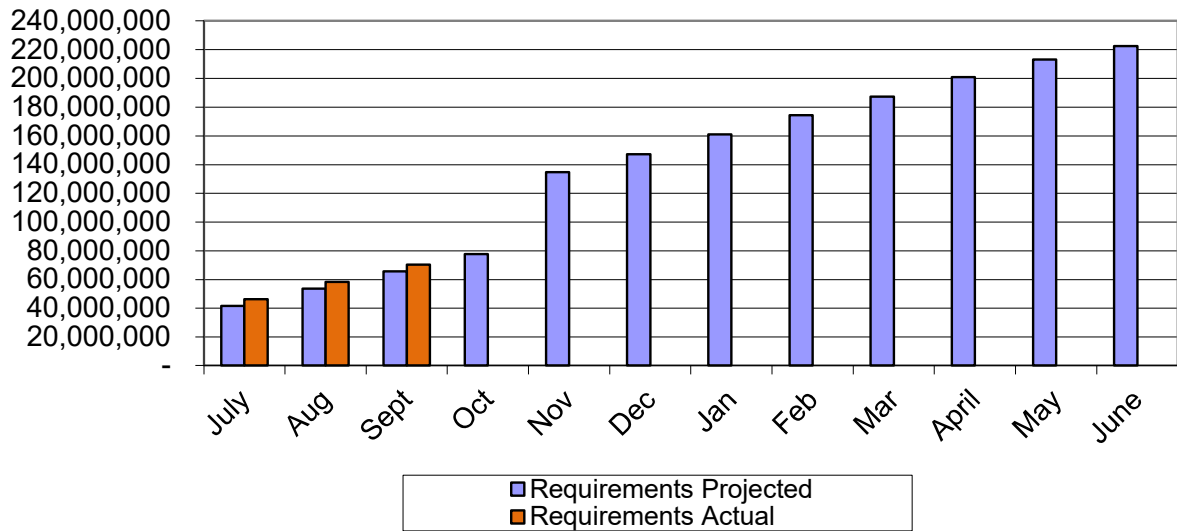
Medford School District 549C
General Fund
Statement of Requirements/Reserves
9/30/2026

	Year-to-Date			
	Budget FY 2026-27	Projected *	Actual 9/30/2026	Over/(under)
				Projection
<u>Requirements</u>				
Salaries	\$ 87,222,695	\$ 11,046,555	\$ 10,657,172	(389,384)
Associated Payroll Costs	\$ 53,237,841	\$ 6,011,974	5,783,666	(228,308)
Purchased Services	\$ 44,932,489	\$ 9,900,000	9,937,489	37,489
Supplies & Materials	\$ 7,768,640	\$ 3,150,000	3,151,866	1,866
Capital Outlay/GASB 87 & 96	\$ 365,000	\$ 79,103	12,600.00	(66,503)
Dues & Fees & NPV GASB 87 and 96	\$ 2,282,557	\$ 2,005,000	2,005,337	337
Transfers Out	\$ 8,488,000	\$ -	-	0
Total Expenditures	\$ 204,297,222	\$ 32,192,632	31,548,130	(644,502)
Other Expense GASB 87 & 96	\$ 1,900,000	\$ -	-	0
Contingency/Reserves	\$ 16,250,687	\$ 38,302,828	36,655,987	(1,646,842)
Total Requirements/Reserves	\$ 222,447,909	\$ 70,495,461	\$ 68,204,117	\$ (2,291,343)

* Forecast Projection of budget by month is based on a historical averages in most cases with some adjustment for recent trends

Expenses are essentially on budget at \$0.68 million or 0.34% favorable due in part to ongoing labor negotiations resulting in MEA COLA not yet agreed to or paid. Contingency is favorable due primarily to beginning fund balance being favorable and that will be adjusted in a future mid-year budget amendment after the audit and annual staffing reconciliation is completed.

Medford School District
2026-27
General Fund Requirements



Medford School District 549C
General Fund Statement of Resources and Requirements
9/30/2026

	Full Year Budget 2026-27	FYTD Actual @ 9/30/2026	% of 26 Budget	Prior Year FYTD Actual @ 9/30/2025	% of '25 Actual
Resources by Source					
State School Fund Formula					
State School Fund	\$ 139,374,923	\$ 46,199,153	33.1%	\$ 45,062,432	35.3%
Property Taxes, Penalties & Interest	51,956,001	288,540	0.6%	320,954	0.7%
Common School Fund	1,961,833	-	0.0%	-	0.0%
Federal Forest Fees	100,000	-	0.0%	-	0.0%
Other State Grants	-	-	-	-	0.0%
					-
Intermediate -					-
SOESD/COUNTY	3,650,000	-	0.0%	15,031	0.4%
					-
Interest on Investments	2,200,966	488,623	22.2%	539,854	17.8%
Juvenile Detention	-	-	0.0%	-	0.0%
Fees Charged to Grants	1,140,000	-	0.0%	-	0.0%
Rentals	100,000	15,074	15.1%	8,615	22.1%
Teen Parent Funding	30,000	-	0.0%	867	4.2%
Transfers In	550,000	-	0.0%	-	0.0%
Other Federal Funding	30,000	89,034	296.8%	234,190	277.3%
Miscellaneous	1,153,500	151,888	13.2%	288,562	24.4%
					-
Subtotal Revenue	\$ 202,247,223	\$ 47,232,313	23.4%	\$ 46,470,506	24.7%
					-
Other Income GASB 87/96	1,900,000	-		-	
Beginning Fund Balance	18,300,686	20,971,804		23,058,686	108.4%
					-
Total Resources	\$ 222,447,909	\$ 68,204,117	30.7%	\$ 69,529,192	32.9%

Uses by Object

Wages	\$ 87,222,695	\$ 10,657,172	12.2%	\$ 11,418,945	14.6%
Associated Payroll Costs	\$ 53,237,841	5,783,666	10.9%	6,451,714	13.9%
Purchased Services	\$ 44,932,489	9,937,489	22.1%	11,176,418	27.0%
Supplies & Materials	\$ 7,768,640	3,151,866	40.6%	3,399,135	69.7%
Capital Outlay Including GASB 87/96 NPV	\$ 365,000	12,600	3.5%	-	0.0%
Other Objects	\$ 2,282,557	2,005,337	87.9%	1,803,617	51.7%
Transfers Out	\$ 8,488,000	-	0.0%	607,700	5.3%
Subtotal Expenditures	\$ 204,297,222	\$ 31,548,130	15.4%	\$ 34,857,529	18.5%
Other Financing Uses	\$ 1,900,000	-		-	
Contingency & Unappropriated Fund Balance	\$ 16,250,687	36,655,987		34,671,663	150.4%
Total Uses	\$ 222,447,909	\$ 68,204,117	30.7%	\$ 69,529,192	32.9%
Beginning Fund Balance	\$ 18,300,686	20,971,804		23,058,686	108.4%
Plus Total Revenue/Other Income	\$ 204,147,223	\$ 47,232,313		\$ 46,470,506	24.5%
Less Total Expenditures ex. Contingencies	\$ 206,197,222	31,548,130		34,857,529	18.5%
Ending Fund Balance Ex. Contingency	\$ 16,250,687	\$ 36,655,987		\$ 34,671,663	
Net Change in Fund Balance	\$ (2,049,999)	\$ 15,684,182		\$ 11,612,977	

Medford School District 549C
General Fund Resources by Object
9/30/2026

Acct	Description	Amended Budget 2026-27	Month Actual	YTD Actual	YTD % of Budget
1111	Current Yr. Taxes	51,067,281	57,194	\$ 177,148	0.3%
1112	Prior Yr. Taxes	848,720	50,446	110,556	13.0%
1114	Payments in lieu of Property Tax	-	-	-	-
1190	Interest & Penalties on taxes	40,000	837	837	2.1%
1312	Tuition	-	-	-	-
1510	Interest on Investments	2,200,966	185,972	488,623	22.2%
1800	Pre-School	65,000	8,689	8,689	13.4%
1900	Other Local Revenue	70,000	-	-	-
1910	Rentals	100,000	4,178	15,074	15.1%
1920	Local Donations	-	-	24	-
1943	Services To Other Districts	40,000	-	-	0.0%
1960	Recovery of Expenditures	5,000	-	79	1.6%
1970	Services to Other Funds	50,000	12,290	14,239	28.5%
1980	Fees Charged to Grants	1,140,000	-	-	0.0%
1990	Miscellaneous revenue	150,000	3,302	17,053	11.4%
1991	Payroll reimbursement	35,000	-	4,588	13.1%
1992	Field Trip reimbursement	15,000	2,482	2,482	16.5%
1994	P-Card Rebate	75,000	-	-	0.0%
1995	Music Inst. Rental	12,500	-	11,500	92.0%
1997	Self Pay Health reimb.	533,000	10,200	93,234	17.5%
1999	E-Rate	103,000	30,472	-	0.0%
Subtotal Local Revenue		56,550,467	\$ 366,062	\$ 944,126	1.7%
2102	SOESD	3,650,000	\$ -	\$ -	0.0%
2199	Other Intermediate Revenue	-	-	-	-
Subtotal Intermediate Revenue		3,650,000	\$ -	\$ -	0.0%
3101	State School Fund	139,374,923	\$ 11,546,323	\$ 46,199,153	33.1%
3103	Common School Fund	1,961,833	-	-	0.0%
3199	State Grants	-	-	-	-
3294	JUV Detention	-	-	-	-
3296	Teen Parent	30,000	-	-	0.0%
3299	Other Grants	-	-	-	-
Subtotal State Revenue		141,366,756	\$ 11,546,323	\$ 46,199,153	32.7%
4202	Medicaid Billing	-	-	\$ 84,982	-
4500	Federal Revenue	-	4,052	4,052	-
4508	Foster Care Transportation	-	-	-	-
4512	Child Care Block Grant	30,000	-	-	0.0%
4801	Federal Forest Fees	100,000	-	-	0.0%
Subtotal Federal Revenue		130,000	\$ 4,052	\$ 89,034	68.5%
5201	Transfers In	550,000	\$ -	\$ -	0.0%
Total Transfers/Other		550,000	\$ -	\$ -	0.0%
Total Revenue		202,247,223	\$ 11,916,437	\$ 47,232,313	23.4%
Other Income/Expense GASB 87/96		1,900,000		\$ -	0.0%
5401	Beginning Fund Balance	18,300,686	21,159,420	21,159,420	115.6%
Total Resources		222,447,909	\$ 33,075,857	\$ 68,391,733	30.7%

Medford School District 549C
Expenses By Object
September 30, 2026

Obj	Description	Budget 2026-27	Month Actual	YTD Actual	YTD Exp % of Budget
111	Certified salaries	\$ 47,983,386	\$ 3,968,790	\$ 3,974,774	8.3%
112	Classified salaries	25,526,262	2,688,458	3,883,627	15.2%
113	Admin salaries	7,311,707	651,580	1,469,576	20.1%
114	Classified Managers	1,506,628	143,029	327,628	21.7%
116	Early Retirement	638,400	24,000	98,000	15.4%
121	Certified subs	23,690	-	-	0.0%
122	Classified subs	150,475	14,274	32,705	21.7%
123	Temp - Certified	630,087	100,965	174,221	27.7%
124	Temp - Classified	479,584	35,148	176,246	36.7%
130	Additional Salary	50,000	12,290	14,238	28.5%
140	Overtime - Classified	432,875	89,091	104,361	24.1%
141	X-Comp	1,782,140	232,492	234,859	13.2%
142	Home Instruction	157,861	1,663	1,663	1.1%
144	Insurance Opt Out	549,600	97,902	165,275	30.1%
Total Salaries		\$ 87,222,695	\$ 8,059,680	\$ 10,657,172	12.2%
210	PERS	26,199,126	2,342,687	2,984,676	11.4%
220	Social Security	5,544,381	485,844	628,443	11.3%
221	Medicare	1,299,107	113,967	137,601	10.6%
231	Worker's Comp	417,491	42,226	43,001	10.3%
232	Unemployment Insurance	898,305	32,223	36,830	4.1%
234	Oregon Paid Leave	337,211	32,126	29,160	8.6%
241	Health Insurance	15,693,988	1,376,903	1,717,468	10.9%
242	Life Insurance	119,981	2,826	(3,830)	-3.2%
243	403b ER Contribution	1,208,899	56,250	80,456	6.7%
244	Long Term Disability	119,233	16,421	15,979	13.4%
245	FSA Match/HSA Match/HC Opt out	677,671	1,612	3,212	0.5%
246	403B Match	216,140	11,001	16,455	7.6%
270	Retiree Medical	506,308	31,142	94,215	18.6%
Total Benefits		\$ 53,237,841	\$ 4,545,227	\$ 5,783,666	10.9%
312	Program Improvement	-	-	-	
313	Student Services	-	850	850	
315	Management Service	70,000	-	9,033	12.9%
318	Professional Growth	264,050	6,075	44,069	16.7%
319	Prof/Tech Service - Instr.	2,376,878	108,325	128,471	5.4%
321	Cleaning Service	1,800	1,810	1,810	100.6%
322	Repair and Maintenance	2,641,300	277,644	701,435	26.6%
324	Rental	667,700	45,820	95,520	14.3%
325	Electricity	2,163,000	169,608	356,036	16.5%
326	Natural Gas/Heating Fuel	490,350	3,818	8,494	1.7%
327	Water/Sewer	859,280	80,154	146,773	17.1%
328	Garbage	325,686	19,148	30,934	9.5%
329	Other Property Service	35,000	306	20,684	59.1%
331	Pupil Transportation	7,284,162	57,012	57,104	0.8%
332	Pupil Trans - Other	89,850	(28,038)	447	0.5%
341	Travel - In District	30,618	1,004	1,176	3.8%
342	Travel - Out of District	161,747	3,726	22,765	14.1%
344	Training - In District	20,000	-	-	0.0%
351	Telephone	360,000	13,031	83,838	23.3%
353	Postage	40,100	20,505	40,521	101.0%
354	Advertising	58,000	1,100	3,733	6.4%
355	Printing	55,000	-	-	0.0%
360	Charter School	21,851,434	1,816,485	7,264,200	33.2%
371	Tuition Payments	53,000	-	540	1.0%
381	Audit	60,000	-	-	0.0%
382	Legal	145,000	13,589	18,442	12.7%
383	Arch/Eng. Svcs	60,000	9,908	13,975	23.3%
384	Negotiations	45,000	5,052	5,230	11.6%
388	Elections	30,000	-	-	0.0%
389	Prof/Tech Service	1,532,450	575,142	649,049	42.4%
391	Licensed Substitutes	2,382,473	144,914	154,066	6.5%
392	Classified Substitutes	778,611	62,086	78,292	10.1%
Total Purchased Services		\$ 44,932,489	\$ 3,409,076	\$ 9,937,489	22.1%

Medford School District 549C
Expenses By Object
September 30, 2026

Obj	Description	Budget 2026-27	Month Actual	YTD Actual	YTD Exp % of Budget
410	Supplies/Materials	2,592,480	202,211	413,737	16.0%
412	Student Rewards	-	-	289	
420	Textbooks	249,500	10,143	97,552	39.1%
430	Library Books	141,700	-	-	0.0%
440	Periodicals	5,907	-	71	1.2%
450	Food	-	24,957	31,420	
451	Travel Meals	-	331	1,750	
460	Non-Consumable	787,681	63,234	174,522	22.2%
470	Computer Software	3,010,185	109,216	2,161,492	71.8%
471	Accelerated Reader Software	2,165	-	-	0.0%
480	Hardware less than 5K	979,022	143,370	271,033	27.7%
Total Supplies and Materials		\$ 7,768,640	\$ 553,462	\$ 3,151,866	40.6%
520	Bldgs. Acquisition	-	-	-	
530	Site Improvement	-	-	-	
541	Equipment over 5K	200,000	-	-	0.0%
542	Replacement Equipment	165,000	-	12,600	7.6%
550	Technology over 5K	-	-	-	
555	SBITA (GASB 96)	1,300,000	-	-	0.0%
556	Lease (GASB 87)	600,000	-	-	0.0%
Total Capital Outlay		\$ 2,265,000	\$ -	\$ 12,600	0.6%
613	Redemption of Principal GASB 87/96	-	-	-	
614	Interest GASB 87/96	-	-	-	
640	Dues/Fees/Memberships	330,417	59,796	105,307	31.9%
651	Liability Insurance	911,343	-	890,175	97.7%
653	Property Insurance	1,010,797	-	1,009,855	99.9%
655	Judgements and Settlements	25,000	-	-	0.0%
690	Indirect Charges	5,000	-	-	0.0%
Total Other Objects		\$ 2,282,557	\$ 59,796	\$ 2,005,337	87.9%
790	Interfund Transfers	8,488,000	-	-	0.0%
Total Transfers		\$ 8,488,000	\$ -	\$ -	0.0%
Subtotal Expenditures and Transfers		\$ 206,197,222	\$ 16,627,241	\$ 31,548,130	15.3%
810	Contingency & Unappropriated Fund Balance	16,250,687	(4,898,420)	36,655,987	225.6%
Total General Fund Requirements/Reserves		\$ 222,447,909	\$ 11,728,821	\$ 68,204,117	30.7%
SPECIAL REVENUE FUND		72,019,400	4,896,287	7,545,868	10.5%
DEBT SERVICE FUND		19,782,469	-	750	0.0%
CAPITAL PROJECTS FUND		581,317	-	-	0.0%
TRUST FUND		714,222	2,400	109,790	15.4%
TOTAL USES EXCLUDING STUDENT BODY FUND		\$ 315,545,317	\$ 16,627,508	\$ 75,860,525	24.0%

EXECUTIVE SUMMARY

Meeting Date:	October 15, 2026
Agenda Item:	Superintendent Quarterly Update on Goals
Item Type:	Information and Discussion
Administrator:	Superintendent Jeanne Grazioli
Objective:	Provide an update on the progress of action steps towards Board/Superintendent Goals

Background: At the July 25 Board Retreat, Board Directors and Superintendent Grazioli reviewed draft goals and participated in an activity to identify and prioritize those that most strongly resonated with the Board and aligned with the district's strategic priorities. The Board identified five shared goals, along with suggested action steps for the Superintendent and Board as well as measures for evaluating progress.

Because we are still early in the year, much of the work is in the implementation stage. Superintendent Grazioli will highlight what is underway, the early information we have available, and the major milestones coming next.

Additional Materials:

[Board / Superintendent Goals & Action Steps](#)

Slide deck provided at the meeting.

Recommendation: Participate in the discussion and provide feedback.

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

Board/Superintendent Goals & Action Steps 2026 – 2027

DISTRICT PRIORITIES



Close Student
Achievement Gaps



Build Trust &
Relationships



Preserve Financial
Sustainability



GOAL 1 Increase Reading Proficiency (K–8)

Superintendent Action Steps

- Provide professional learning for teachers on evidence-based literacy instruction aligned with the Science of Reading.
- Monitor implementation of the district's reading curriculum and instructional best practices, and provide regular progress reports to the Board.
- Regularly review student reading data with district leadership at regular intervals to identify trends and implement responsive supports.

Board Action Steps

- Review reading achievement data at regular intervals.
- Monitor progress toward the goal through Board reports and implementation updates.

Measures: OSAS English Language Arts, iReady Reading Growth and Proficiency



GOAL 2 Increase Mathematics Proficiency (K–8)

Superintendent Action Steps

- Monitor implementation of the district's mathematics curriculum and instructional best practices, and provide regular progress reports to the Board.
- Develop a professional learning plan focused on effective mathematics instruction.
- Regularly monitor student mathematics outcomes and adjust supports as needed.

Board Action Steps

- Review math achievement data at regular intervals.
- Monitor progress toward the goal through Board reports and implementation updates.

Measures: OSAS Mathematics, iReady Mathematics Growth and Proficiency



GOAL 3 Improve Student Attendance

Superintendent Action Steps

- Evaluate the effectiveness of existing attendance recognition programs K-8, and revise or expand them as appropriate.
- Monitor chronic absenteeism, identify barriers, and implement targeted interventions.
- Explore the feasibility of a year-round calendar by presenting multiple models and gathering stakeholder feedback.

Board Action Steps

- Review attendance and chronic absenteeism trends at regular intervals.
- Support and advocate for state policies that promote regular attendance.

Measure: District Attendance Data



GOAL 4 Strengthen Community Engagement

Superintendent Action Steps

- Develop an internal and external communication plan.
- Conduct regular surveys and share results with stakeholders annually.
- Expand community partnerships that increase locally sourced foods while maintaining fiscal responsibility and meeting nutrition standards.
- Keep the Board and community informed regarding district financial conditions and budget development.
- Provide community engagement opportunities on the topic of school consolidation, and make recommendations to the Board by March 2027.
- Promote district engagement opportunities within the community.

Board Action Steps

- Monitor progress toward community engagement goals.
- Review family and student engagement survey results.
- Promote district engagement opportunities within the community.
- Make budget decisions that preserve the district's long-term sustainability.

Measure: YouthTruth Family & Student Survey



GOAL 5 Strengthen Student Safety

Superintendent Action Steps

- Ensure consistent implementation of the districtwide behavior matrix through ongoing calibration with school and student services teams.
- Monitor major behavioral incident data and implement improvement strategies as needed.
- Provide staff training in de-escalation and proactive behavior supports, with emphasis on supporting students with intensive behavioral needs.

Board Action Steps

- Review discipline policies and applicable state law.
- Review behavioral and discipline data to assess district progress.

Measure: Discipline and Behavioral Incident Data, YouthTruth Student Survey



EXECUTIVE SUMMARY

Meeting Date:	October 15, 2026
Agenda Item:	Board/Superintendent Goal: Increase Reading and Mathematics Proficiency
Item Type:	Information
Administrator:	Dr. Doris Ellison
Objective:	Provide an overview of K-8 Beginning-of-Year i-Ready Reading and Mathematics data to establish a baseline of student achievement, identify instructional priorities, and inform strategies to support student growth.

Background:

The K-8 Beginning-of-Year i-Ready Inform (previously titled i-Ready Diagnostic) provides an initial snapshot of student achievement in Reading and Mathematics and establishes a baseline for instructional planning, intervention, and monitoring of student growth throughout the school year.

Based on the Beginning-of-Year data, the district will focus on:

- Strengthening core instruction in Reading and Mathematics.
- Addressing identified prerequisite and foundational skill gaps to support access to grade-level learning.
- Providing timely, targeted intervention for students performing below grade-level expectations.
- Extending learning opportunities for students demonstrating advanced readiness.
- Using diagnostic and progress-monitoring data to inform instruction, allocate supports, and measure student growth throughout the year.

Additional Materials: [Understanding i-Ready Performance Levels](#)
[K-8 Beginning of Year Baseline](#)
[i-Ready Inform Results Math.pdf](#)
[i-Ready Inform Results Reading](#)

Recommendation: N/A- For information only.

Suggested Motion: N/A

Understanding i-Ready Performance Levels

K–8 READING AND MATHEMATICS

Purpose

The i-Ready Inform assessment provides educators with valuable information about students' current academic performance and readiness for instruction in Reading and Mathematics.

Beginning with the 2026–27 school year, i-Ready Diagnostic was renamed i-Ready Inform. The assessment continues to provide criterion-referenced placement information, allowing educators to evaluate student performance against established grade-level expectations.

Beginning-of-year assessment results establish a baseline for student performance and help the district identify instructional priorities, allocate resources and supports, inform improvement planning, and monitor academic growth over time.

How i-Ready Performance Levels Work

i-Ready Inform uses scale scores to measure student performance in Reading and Mathematics. These scores determine placement relative to established grade-level performance expectations. For students in kindergarten through eighth grade, performance is generally reported in the following categories:

PERFORMANCE LEVEL	WHAT IT MEANS
Above Grade Level	Student performance exceeds the expected range for the student's current grade level.
On Grade Level	Student performance falls within the range associated with current grade-level expectations.
One Grade Level Below	Student performance is approximately one grade level below current grade-level expectations.
Two or More Grade Levels Below	Student performance is approximately two or more grade levels below current grade-level expectations.

These placement categories are criterion-referenced: they reflect the relationship between a student's scale score and established grade-level performance ranges, rather than comparisons with other students.

What the Performance Levels Tell Us

Performance levels provide educators and district leaders with a consistent framework for understanding student achievement. The primary question they help answer is:

Where is the student performing relative to grade-level expectations at this point in time?

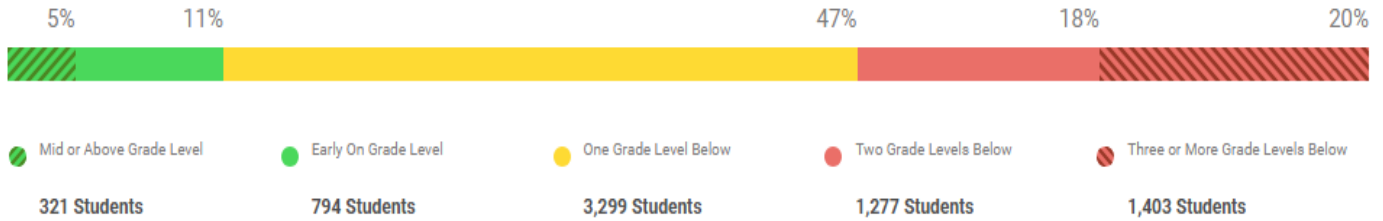
- Identify students demonstrating readiness for grade-level instruction or advanced academic content.
- Determine which students may benefit from additional support to access grade-level instruction.
- Identify foundational knowledge and prerequisite skills requiring targeted instruction.
- Examine patterns across grade levels, schools, student groups, and content areas.
- Establish classroom, school, and district instructional priorities using performance data.

Using Results to Inform Instruction

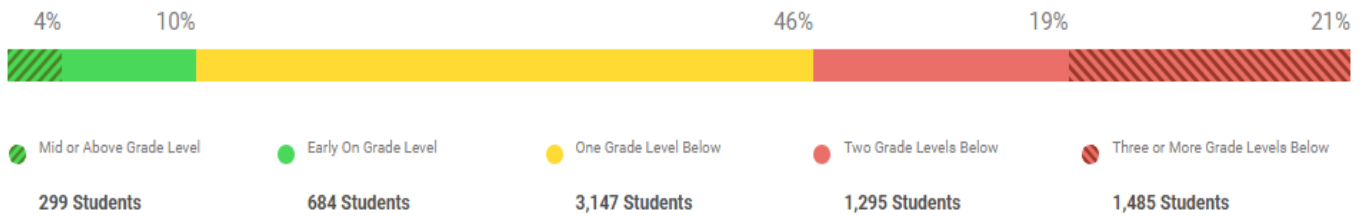
i-Ready Inform results represent a snapshot of student performance at a specific point in time. Consider them alongside classroom assessments, student work, teacher observations, and other relevant evidence of learning.

Together, these data support instructional decision-making, targeted academic support, and ongoing monitoring of student growth. The goal is to ensure every student receives instruction and support aligned with their academic needs.

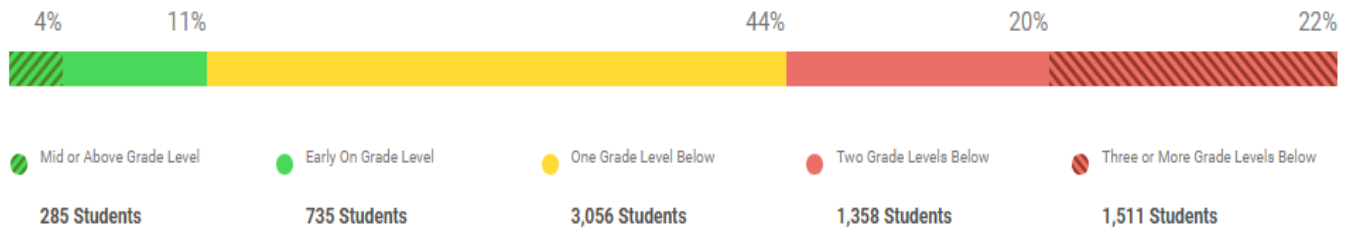
K-8 Beginning-of-Year Baseline Overall Mathematics 2026-27



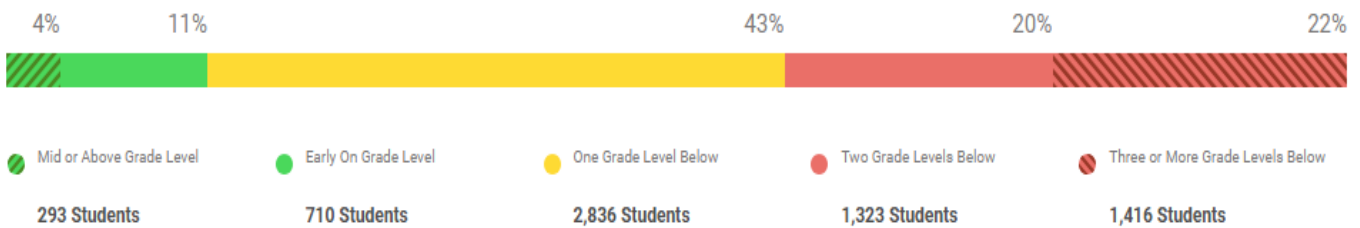
2025-26:



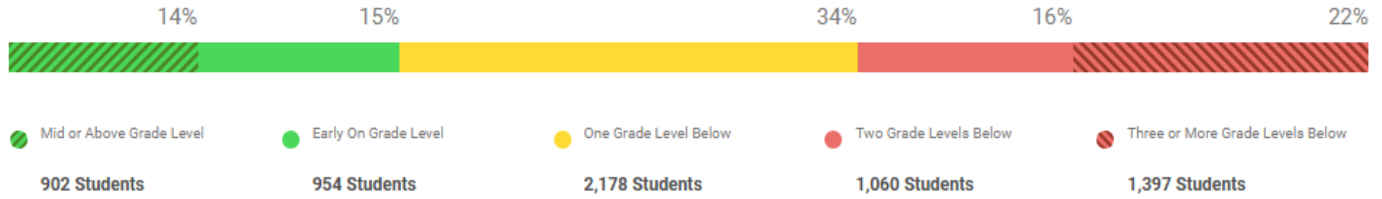
2024-25:



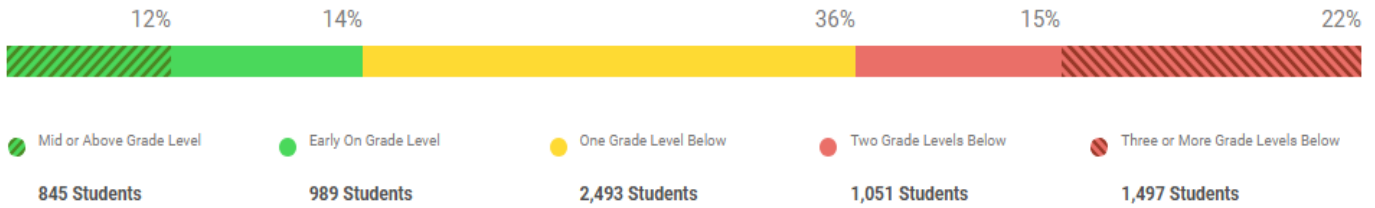
2023-24:



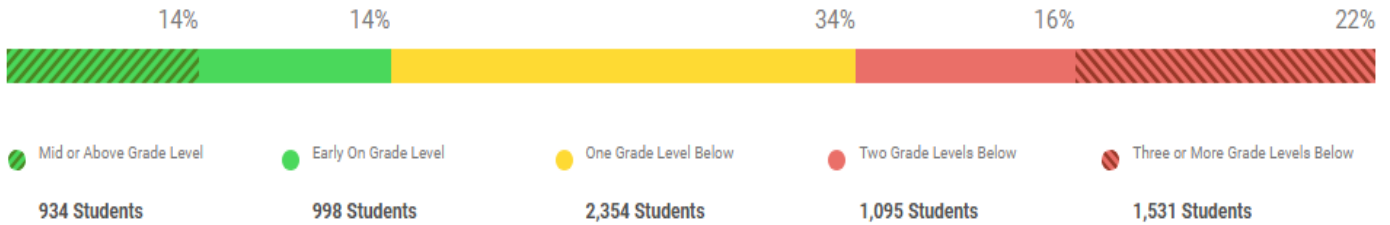
K-8 Beginning-of-Year Baseline Overall Reading 2026-27



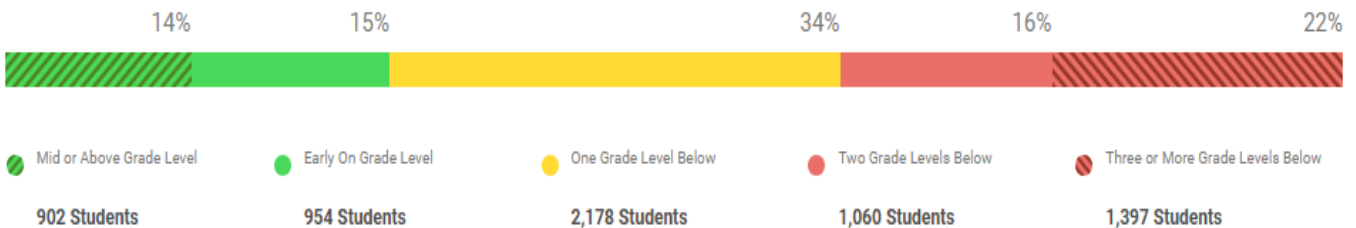
2025-26



2024-25



2023-24

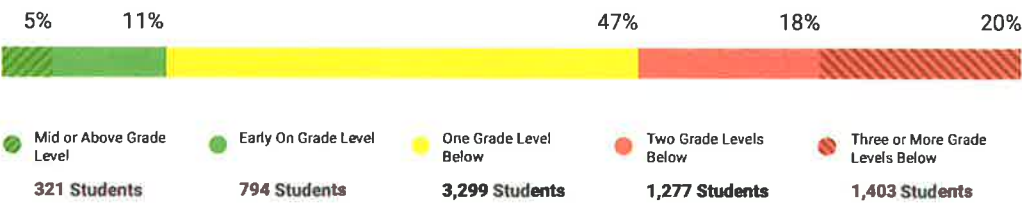


School All Schools
Subject Math
Academic Year 2026 - 2027
i-Ready Inform Assessment Most Recent
Prior i-Ready Inform Assessment None

Criterion Referenced

Overall Placement

Students Assessed/Total: 7,094/10,714



Placement by Domain



Switch Table View

Choose to Show Results By

Placement Summary

Grade

Showing 13 of 13

Grade	Overall Grade-Level Placement						Students Assessed/Total
Grade K		6%	10%	85%	0%	0%	644/697
Grade 1		4%	4%	75%	17%	0%	711/769
Grade 2		4%	8%	50%	38%	0%	744/775
Grade 3		3%	8%	50%	24%	15%	827/852
Grade 4		4%	10%	43%	21%	22%	758/782

i-Ready Inform Results



School All Schools
Subject Math
Academic Year 2026 - 2027
i-Ready Inform Assessment Most Recent
Prior i-Ready Inform Assessment None

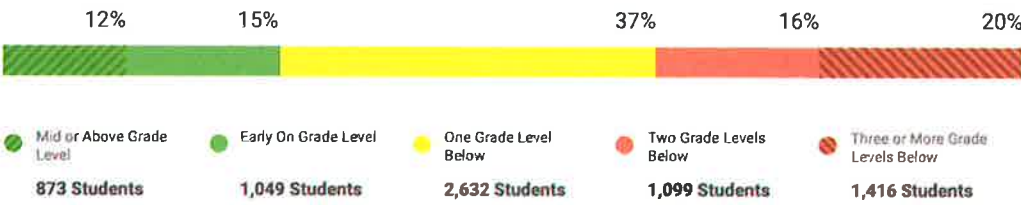
Grade	Overall Grade-Level Placement						Students Assessed/Total
Grade 5		7%	14%	41%	16%	22%	916/938
Grade 6		6%	16%	31%	17%	30%	798/817
Grade 7		4%	15%	30%	16%	35%	826/865
Grade 8		4%	13%	28%	12%	42%	832/865

School All Schools
Subject Reading (English)
Academic Year 2026 - 2027
i-Ready Inform Assessment Most Recent
Prior i-Ready Inform Assessment None

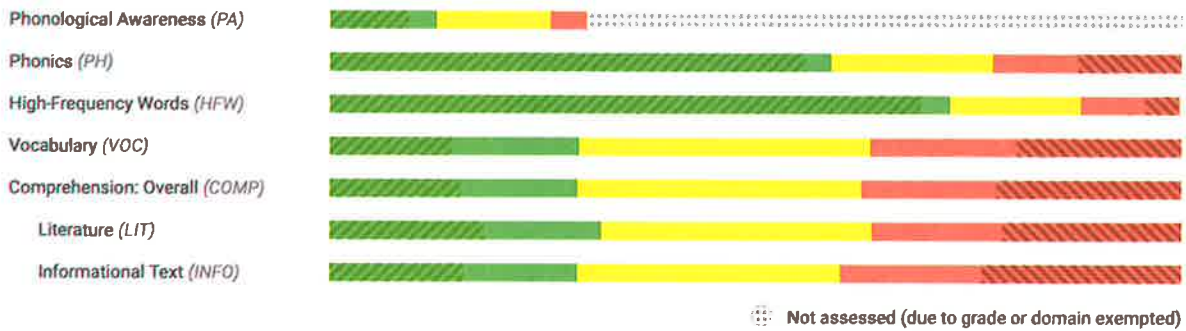
Criterion Referenced

Overall Placement

Students Assessed/Total: 7,069/10,671



Placement by Domain



Not assessed (due to grade or domain exempted)

Switch Table View

Choose to Show Results By

Placement Summary

Grade

Showing 13 of 13

Grade	Overall Grade-Level Placement						Students Assessed/Total
Grade K		4%	13%	83%	0%	0%	654/697
Grade 1		6%	5%	79%	9%	0%	721/769
Grade 2		9%	12%	38%	41%	0%	755/775

i-Ready Inform Results



School

Subject

Academic Year

i-Ready Inform Assessment

Prior i-Ready Inform Assessment

All Schools

Reading (English)

2026 - 2027

Most Recent

None

Grade	Overall Grade-Level Placement						Students Assessed/Total
Grade 3		13%	27%	24%	20%	16%	826/852
Grade 4		13%	13%	40%	12%	23%	760/782
Grade 5		13%	17%	28%	24%	18%	919/938
Grade 6		20%	11%	20%	14%	36%	781/817
Grade 7		14%	16%	20%	10%	40%	804/865
Grade 8		18%	17%	19%	7%	39%	825/865



EXECUTIVE SUMMARY

Meeting Date:	October 15, 2026
Agenda Item:	Division 22 Assurances for 2025-2026
Item Type:	Report
Administrator:	Dr. Doris Ellison
Objective:	Present Division 22 Report to Community

Background: Each year, Oregon’s school districts are required to review the Oregon Administrative Rules (OAR), located in Chapter 581, Division 22, related to Oregon’s standards for public schools. Each district must assess whether the district is in compliance with those standards for the prior school year. On or before November 1st of each school year, school district superintendents are to provide a Community Report to their local school board regarding the district’s standing with respect to all Standards for Public Elementary and Secondary Schools as set forth in Oregon Administrative Rules 581-022-2305. Districts are required to post the report on their district website by November 1, 2026. Districts must then complete and submit the annual Elementary and Secondary Schools Assurance Form to the Oregon Department of Education (ODE) by November 15, 2026.

For the 2025-2026 school year. Districts must identify specific evidence and track each requirement internally.

The final Division 22 Community Report will be posted on [Medford’s Division 22 Assurance website](#).

Additional Materials:
[Division 22 Community Report \(2025-2026\)](#)

Recommendation: N/A

Suggested Motion: N/A

Medford School District 549c

Report on Compliance with Public School Standards

2025-26 School Year

By November 1 of each year, school district superintendents are required by [OAR 581-022-2305: District Assurances of Compliance with Public School Standards](#) to report to their community on the district's status with respect to all of the Standards for Public Elementary and Secondary Schools. The Standards are adopted by the State Board of Education and set out in Oregon Administrative Rules Chapter 581, Division 22.

The table below contains a summary of Medford School District's compliance with each of the requirements of Oregon's administrative rules found in [DIVISION 22 - STANDARDS FOR PUBLIC ELEMENTARY AND SECONDARY SCHOOLS](#) during the 2025-26 school year. For each rule reported as out of compliance, Medford School District has provided an explanation of why the school district was out of compliance and the school district's proposed corrective action plan to come into compliance. The corrective action must be approved by ODE and completed by the district by the beginning of the 2027-28 school year.

What are the requirements of the standards? For a general overview of what each rule/standard requires, consult this high-level [Rules at a Glance summary](#). For specific, comprehensive requirements, use the links below for each individual rule.

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Category: High-Quality Learning Experiences for All Students

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2000 Diploma Requirements	In compliance	Graduation Requirement Board Policy IKF	Not applicable
581-022-2010 Modified Diploma	In compliance	Graduation Requirement Board Policy IKF	Not applicable
581-022-2015 Extended Diploma	In compliance	Graduation Requirement Board Policy IKF	Not applicable
581-022-2020 Certificate of Attendance	In compliance	Graduation Requirement Board Policy IKF	Not applicable

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2050 Human Sexuality Education	In compliance	Included in Health Planned Course Statements MSD Comprehensive Sexuality Education Plan Human Sexuality, AIDS/HIV, Sexually Transmitted Diseases, Health Education** Board Policy IGAI MSD Health K-12 Parent Opt Out & Health Info Health Standards Letter from MSD Board	Not applicable
581-022-2055 Career Education	In compliance	Graduation Requirements Board Policy IKF MPACT Overview MSD Pathways , including CTE Major Clarity & Career Scope & Sequence Postsecondary Options for Credit	Not applicable
581-022-2263 Physical Education Requirements *Elementary Grades	In compliance	Division 22 PE K-8 Minutes	Not Applicable
581-022-2263 Physical Education Requirements *Middle Grades	In compliance	6-8: Per confirmation from all middle school principals, all students are enrolled to meet this requirement this school year.	Not applicable

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Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2340 Media Programs	In compliance	Medford School District has a District Media Specialist that supports Media Technicians at 14 elementary schools, 3 comprehensive middle schools, and 2 comprehensive high schools. One person staffs the Instructional Media Center (IMC) and facilitates distributing physical instructional materials to all schools. The MSD Library Media Center Procedures Manual provides guidance and support for maintaining consistent, equitable, and aligned procedures in K-12 libraries and media centers.	Not applicable
581-022-2350 Independent Adoptions of Instructional Materials	In compliance	All schools use the same core instructional materials, adopted through ODE's IMET process. Curriculum Development and Adoption Board Policy IF	Not applicable
581-022-2355 Instructional Materials Adoption	In compliance	Curriculum and Instructional Materials Development and Adoption Process Adoption Cycle 6-Year Plan	Not applicable
581-022-2360 Postponement of Purchase of State-Adopted Instructional Materials	In compliance	Science: Request for Approval to Postpone Selection and Use of Adopted Instructional Materials Health: Request for Approval to Postpone Selection and Use of Adopted Instructional Materials	Not applicable

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2440 Teacher Training Related to Dyslexia	In compliance	Training to Assistant Principals: Aug 28, 2025 presentation Training to building staff: Oct 8, 2025 presentation	Not applicable
581-022-2500 Programs and Services for TAG Students- Sections (1) and (2) TAG Plan Requirements	In compliance	Medford School District Plan for Talented and Gifted (TAG) Education	Not applicable
581-022-2500 Programs and Services for TAG Students – Sections (3) and (4): Instruction Requirements	In compliance	Medford School District Plan for Talented and Gifted (TAG) Education	Not applicable
581-022-2505 Alternative Education Programs	In compliance	Alternative Education Program** Board Policy IGBHA Establishment of Alternative Education Programs Board Policy IGBHB	Not applicable

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Category: Aligned and Focused Educational Systems

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2025 Credit Options	In compliance	Nontraditional Credit Definitions & Procedures	Not applicable

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2030 District Curriculum	In compliance	Medford School District Curriculum Management Plan District Commitment to Student Learning Board Policy IFAA Curriculum Guides and Course Outlines Board Policy IFE Curriculum Development Board Policy IF English, Science, Math, Social Science, World Languages, Health, Electives, Arts, and CTE Planned Course Statements *Technology: Digital Citizenship Lessons SEL K-5 SEL Instructional Framework MS 6-8 Advisory Calendar HS Guidance Lesson Calendar Personal Finance Higher Education and Career Path Skills	Not applicable
581-022-2060 Comprehensive School Counseling	In compliance	MSD Comprehensive School Counseling Plan 25-26 SEA 25-26 agenda Secondary Counselor 25-26 agenda Student Services Agenda	Not applicable
581-022-2100 Administration of State Assessments	In compliance	26-27 Test Administration Manual 26-27 Oregon Accessibility Manual 26-27 MSD Elementary Assessment Calendar 26-27 MSD Secondary Assessment Calendar 26-27 ELPA Screener training	Not applicable

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Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2110 Exception of Students with Disabilities from State Assessments	In compliance	Board Policy IGBAF-AR (504 falls under IDEA Act, so we don't have to have a separate policy)	Not applicable
581-022-2115 Assessment of Essential Skills: Diploma Requirements	Waived through the end of the 2027-28 school year	Not applicable	Not applicable
581-022-2115(2) Assessment of Essential Skills: Local Performance Assessment Requirement	In compliance	25-26 MSD Work Sample Guidelines.	Not applicable
581-022-2120 Essential Skill Assessments for English Language Learners	Waived through the end of the 2027-28 school year	Not applicable	Not applicable
581-022-2250 District Improvement Plan	In compliance	Aligning for Student Success: Integrated Guidance MSD website	Not applicable
581-022-2260 Records and Reports	In compliance	District processes are in place to submit required records and reports to the Oregon Department of Education in accordance with OAR 581-022-2260(1). The District instructs schools on student body fund use, reviews student body accounts, and conducts annual audits to ensure students spend funds raised by students for students. The District maintains student records in compliance with board policies IGBAB/JO and IGBAB/JO-AR and complies with reporting requirements.	Not applicable

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Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2265 Report on PE Data	In compliance	Division 22 PE K-8 Minutes	Not applicable
581-022-2300 Standardization	In compliance	MSD Division 22 website	Not applicable
581-022-2305 District Assurances of Compliance with Public School Standards	In compliance	MSD Division 22 website	Not applicable
581-022-2315 Special Education for Children with Disabilities	In compliance	The Medford School District provides a continuum of services for all students eligible for special education. Board Policy: Special Education - Procedural Safeguards** IGBAG Special Education - Free Appropriate Public Education (FAPE) IGBAJ Special Education - Individualized Education Program (IEP)** IGBAF	Not applicable
581-022-2320 Required Instructional Time	In compliance	Instructional Minutes Elementary Instructional Minutes Secondary	Not applicable
581-022-2323 Preserving Student Instructional Time	In compliance	MSD did not reduce time during 2025-2026	Not applicable

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Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2325 Identification of Academically Talented and Intellectually Gifted Students	In compliance	Medford School District Plan for Talented and Gifted (TAG) Education Blue Screening Report ODE Training Slide Decks Nomination form Parent Permission to Evaluate Use NNAT3, CogAT, iReady, OSAS for scores as well as state scoring rubrics for evidence collection	Not applicable
581-022-2335 Daily Class Size	In compliance	Public Meeting Agenda: October 1, 2026 at 5:45 PM - Work Session - BoardBook Premier	Not applicable
581-022-2400 Personnel	In compliance	All employees hired into licensed positions must hold licenses before beginning work in that position. For qualified candidates without appropriate licensure, Human Resources reviews and determines whether a provisional/emergency license applies. The District writes a letter to TSPC and waits for TSPC to issue a license before a staff member can begin working. Licensed Staff Positions G/GC Board Policy-GC License Requirements Board Policy-GCA	Not applicable
581-022-2445 Universal Screenings for Risk Factors of Dyslexia	In compliance	From ODE's Department's approved list : iReady Dyslexia assessments Training to Assistant Principals: August 28, 2025 presentation Training to building staff: Oct 8, 2025 presentation	Not applicable

Category: Engaged Partners and Communities

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2005 Veterans Diploma	In compliance	Graduation Requirement Board Policy IKF	Not applicable
581-022-2255 School and District Performance Report Criteria	In compliance	District and School Report Cards website	Not applicable
581-022-2270 Individual Student Assessment, Recordkeeping and Reporting	In compliance	School Board Policies on Grading and Assessment: IKA, IKA-AR Report Cards & Transcripts are shared and recorded for each student 25-26 Report Card Timelines Elementary Assessment Calendar 25-26 Secondary Assessment Calendar 25-26 Credit Retrieval Courses are offered during the school year and during the summer. Teachers provide ongoing performance feedback to students in Canvas, and end-of-term grades are shared with families and students in Synergy Gradebook. Synergy SIS keeps SSID information.	Not applicable

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Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2307 Educational Equity Advisory Committees	In compliance	Reviewed YouthTruth Data Medford School District has a Name, Strength and Need Advisory Committee that serves as the district's Educational Equity Advisory Committee. In alignment with OAR 581-022-2307 and HB 2453 revisions, the committee brings together students, families, staff, and community members—particularly those representing underserved student groups to advise the Superintendent on educational equity. The committee will review data and feedback, identify strengths and needs, and support a two-way communication process around equity and DEI priorities.	Not applicable
581-022-2330 Rights of Parents of TAG Students	In compliance	Talented and Gifted (TAG) Education Parent Notification of TAG Identification Parent TAG Brochure Student Observation Profile for Parents of TAG Students Permission for Services with Opt-out	Not applicable

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Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2370 Complaint Procedures	In compliance	Complaint Procedures are linked at the bottom of the District webpage. Additional policies: Federal Law Title IX Sexual GBN/JBA(2) Harassment Complaint Procedures JFCF-AR/GBNA-AR Hazing/Harassment/Intimidation/Bullying/Menacing Complaint Procedure JFCF-AR Bias Incident Complaint Procedure ACB-AR Workplace Harassment GBEA-AR	Not applicable

Category: Safe & Inclusive Schools

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2045 Substance Use Prevention and Intervention Plan	In compliance	Included in the Great Body Shop curriculum (grades K-8). Substance Abuse and Misuse Lessons Teen Intervene program with Upshift at secondary “Alternative to Suspension” Alex’s Story “Dangers of Fentanyl” in secondary Health Class Planned Course Statements MSD Substance Use Prevention Plan 2/2026	Not applicable

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Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2205 Policies on Reporting of Child Abuse	In compliance	The district has met all of the requirements for this rule. The District has adopted policies on the reporting of Child Abuse: JHFE/GBNAB and JHFE-AR(1), BBFC	Not applicable
581-022-2210 Anabolic Steroids and Performance Enhancing Substances	In compliance	Secondary coaches & AD's - Take the online course through NFHS (every four years). Trainings tracked by high school & middle school ADs: Appearance and Performance Enhancing Drugs and Substances Course Lessons were delivered to secondary students during Red Ribbon Week at SMHS; lessons were provided during Tiger Time and during a health project at Innovation Academy; NMHS covered content during health classes in grades 10 and 12 and/or athletes received the training from their coaches. Oregon Department of Education Anabolic Steroids and Performance-Enhancing Substances Training	Not applicable

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2215 Safety of School Sports – Concussions	In compliance	Coaches & AD's take an annual online course through NFHS . High school ADs track training via the OSAA website and Human Resources. Annually, coaches must also sign that they have read the Secondary Coaches Handbook and agree to follow the expectations outlined, including adhering to training requirements; they must also confirm in Vector that they are in compliance by the end of October. Manage 26/27 NMHS Staff Manage 26/27 SMHS Staff	Not applicable
581-022-2220 Health Services	In compliance	MSD 25-26 Health Services Plan	Not applicable
581-022-2223 Healthy and Safe Schools Plan	In compliance	Health and safe schools plan	Not applicable
581-022-2225 Emergency Plans and Safety Programs	In compliance	Student & Staff Training - Medford School District 549C Standard Response Protocol (SRP) - Medford School District 549C Earthquake Preparedness - Shake Alert - Medford School District 549C	Not applicable
581-022-2230 Asbestos Management Plans	In compliance	We have Asbestos Management Plans for all sites. Custodial and maintenance staff have been trained. MSD Asbestos Management Page .	Not applicable
581-022-2267 Annual Report on Restraint and Seclusion	In compliance	MSD restraint report website .	Not applicable

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2308 Agreements Entered Into with Voluntary Organizations	Not in compliance	See Board Policy Interscholastic Activities IGDJ	SOMSAC does not administer an annual survey, but MSD will work with the conference to create and administer a survey, beginning this year. This affects every middle school in our region that participates in sports, not just MSD. All other aspects are being met.
581-022-2310 Equal Education Opportunities	In compliance	Board Policy JFCF	Not applicable
581-022-2312 Every Student Belongs	In compliance	Board Policy ACB	Not applicable
581-022-2345 Auxiliary Services	In compliance	Transportation Report submitted 8/31/2026; Food Service records are complete in CNPweb. Buildings and grounds are appropriate for educational purposes and are routinely cleaned & maintained. Our liability insurance provider routinely inspects our facilities, and they are considered safe for use by students and staff.	Not applicable
581-022-2430 Fingerprinting of Subject Individuals in Positions Not Requiring Licensure as Teachers, Administrators, Personnel Specialists, School Nurses	In compliance	Criminal History Records Checks/Fingerprinting GCG/GCDA, GDDA	Not applicable

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2510 Suicide Prevention Plan	In compliance	MSD Suicide Pre/Postvention Plan Posted on Student Wellness page School Trauma Assistance Team Manual	Not applicable
581-022-2515 Menstrual Dignity for Students	In compliance	Facilities have verified that all restrooms comply with this standard and are continually stocked.	Not applicable

Category: Committed and Supportive Staff

Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2405 Personnel Policies	In compliance	Board Policies: GBA-Equal Employment Opportunity GBA-AR Veterans' Preference GCC-Recruitment of Licensed and Administrative Staff GCN/GDN-Evaluation of Staff CCG-Evaluation of Administrators GBAA-Educator Equity GCL-Staff Development GBL-Personnel Records	Not applicable

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Rule # and Title	Status	Explanation/Evidence	Corrective Action Plan & Timeline
581-022-2410 Teacher and Administrator Evaluation and Support	In compliance	Teacher Evaluation: Professional Growth and Performance Evaluation Manual Admin Evaluation Handbook: Available upon request Eval of Staff GCN/GDN Eval of the Superintendent CBG	Not applicable
581-022-2415 Core Teaching Standards	In compliance	Teacher Evaluation: Professional Growth and Performance Evaluation Manual Danielson Framework	Not applicable
581-022-2420 Educational Leadership - Administrator Standards	In compliance	MSD uses the most current leadership standards from the Professional Standards for Educational Leaders (PSEL). The standards are aligned to the previous ISLLC standards and expand on the 6 areas of ○ Visionary Leadership ○ Instructional Improvement ○ Effective Management ○ Inclusive Practice ○ Ethical Leadership ○ Socio-political Context Evaluation of Admin Board Policy CCG	6Not applicable

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EXECUTIVE SUMMARY

Meeting Date:	October 15, 2026
Agenda Item:	Budget Committee Vacancies
Item Type:	Items for Information and Discussion
Administrator:	Kati Falger, Jodi Fahy
Objective:	Identify Budget Committee vacancies

Background: School Board Policy DBEA requires the Board to identify vacant budget committee positions at its first regular meeting in October. Currently, Budget Committee terms for Positions 5 (Ilex Brandenberger), 6 (Vacant) and 7 (Brooke Lazzari) have expired.

The Budget Committee consists of seven members appointed by the Board plus the elected Board members. To be eligible for appointment, the appointive member must: 1) live and be registered to vote in the district; and 2) not be an officer, agent or employee of the district. No budget committee member may receive any type of compensation from the district. At the first regular meeting in January, the Board will appoint persons to fill the vacant positions.

Additional Materials: [Budget Committee Members - vacancies](#)

Recommendation: Review the vacancies and direct staff to move forward with posting the application for interested community members on the district website during the month of November.

Suggested Motion: No action is required.



Budget Committee Members (3 year term)

Position 1 Lupe Murillo	Term Expires:	06/30/2027
Position 2 Amanda Olson	Term Expires:	06/30/2027
Position 3 Casey Stine	Term Expires:	06/30/2028
Position 4 Christy Clark	Term Expires:	06/30/2028
Position 5 Ilex Brandenberger	Term Expired:	06/30/2026
Position 6 Kaylee Fugate (resigned 4/6/26)	Term Expired:	06/30/2026
Position 7 Brooke Lazzari	Term Expired:	06/30/2026



EXECUTIVE SUMMARY

Meeting Date:	October 15, 2026
Agenda Item:	Revise DLC-AR Expense Reimbursement for Out-of-District Travel
Item Type:	Information & Discussion
Administrator:	Jeanne Grazioli, Kati Falger
Objective:	Review revisions to administrative regulation

Background:

Board Policy DLC states, “The district will reimburse employees for authorized expenses incurred for professional growth and/or job requirements in accordance with administrative regulations developed by the superintendent and consistent with Internal Revenue Service requirements.”

The administrative regulation associated with this policy, DLC-AR – Expense Reimbursement for Out-of-District Travel, has been reviewed by Business Services. Revisions are proposed to update the meal reimbursement amounts and bring the regulation into alignment with current standards. The district’s current meal reimbursement amounts are:

Breakfast - \$6
Lunch - \$7
Dinner - \$20

The updated AR will reflect meal reimbursement amounts according to the U.S. General Services Administration (GSA) standard rates. As of October 1, 2026 the amounts are:

Breakfast - \$16
Lunch - \$19
Dinner - \$28

Additional revisions are intended to align the administrative regulation with current district procedures for staff expense reimbursement. Due to the extent of the proposed changes, staff recommends deleting the current administrative regulation and replacing it with the updated version. The revised regulation is based on the OSBA sample administrative regulation and has been adapted to reflect the district’s current practices and procedures.

Board approval is not formally required for this administrative regulation, and first and second readings are not necessary. However, consistent with the district’s current practice of bringing administrative regulations to the Board for review and discussion, DLC-AR has been placed on the agenda for the Board’s review and discussion.

Additional Materials:

[DLC-AR - Packet](#)

Recommendation:

Review the proposed revisions to DLC-AR and provide feedback.

Suggested Motion:

No action required.

Medford School District 549C

Code: DLC-AR
Adopted/Readopted: 10/02/01; 01/09/20
Orig. Code(s): DLC-AR

Expense Reimbursement for Out-Of-District Travel

It is the practice of the Board to provide reimbursement of expenses incurred by all personnel performing duties and services on behalf of the district. Such expenses must be in accordance with district guidelines and statutes and be duly authorized by the appropriate supervisor. Frequent flyer miles earned by employees through purchases made by the district are to be used for business purposes only. Record keeping is the responsibility of the employee.

The district will provide for necessary job related transportation costs either through the provision of mileage reimbursement for use of personally owned vehicle, or through payment of common carrier fares.

Request for Travel

A travel advance and expense report form (28-TAER) must be completed and be approved by the employee's immediate supervisor and/or the division head before any out-of-district travel can be confirmed. A group that is traveling together may use one form as long as the travel advance and reimbursement are payable to only one person. That person has complete responsibility for reporting expenses.

Automobile Mileage Allowance

An employee may find it necessary to use his/her private automobile to conduct out-of-district school district business. Such use should occur only with the knowledge and approval of the appropriate supervisor. Reimbursement for actual miles traveled on school district business shall be calculated at the currently approved IRS rate per mile. Insurance, operational, and maintenance expense are included as part of the driver's allowance. Only those miles actually traveled in connection with school district business may be claimed. Ordinarily, automobile reimbursement will not exceed commercial coach airfare.

Insurance Cost

It is the responsibility of the owner or driver of the car to make certain that the vehicle is covered by personal liability and property damage insurance as required by Oregon State Law. District collision and liability insurance covers the business use of a rental vehicle.

Travel Advance

A request for travel advance may be made by completing the left side and the lower portions of the travel advance and expense report form (28-TAER). Both estimated costs and the amount of advance requested are to be noted, and upon approval, the immediate supervisor will submit the original copy of form 28-TAER to the business office. The cost of travel tickets will not be included in a cash advance but will be paid directly to the travel agent of record through the district's account.

Travel Accounting – General Instructions

Immediately following return from travel, the employee will complete and submit the second copy of

Form 28-TAER to the business office. If the completed report is less than the travel advance, the difference must be returned to the business office with the report. If expenditures are in excess of the cash advance, reimbursement will be made within 15 days after the approved report is received.

Receipts required as follows:

1. All lodging expenses claimed. Lodging shall be at a reasonable commercial rate.
2. Expenses for meals, including gratuity, which exceed breakfast (\$6.00), lunch (\$7.00), and dinner (\$20.00). No receipts are required if expenses do not exceed these amounts.
3. Registration, conference, and workshop fees if not paid in advance by the district.
4. When it is necessary to rent a car, a copy of the rental agreement is to be attached to the travel expense report.
5. Expenses which consist primarily of the cost of furnishing meals require a statement identifying guests by name, the organization affiliation, if any, and the business discussed.

In the absence of a receipt, a signed statement of expenses attesting to the amount and purpose of the expenditure may be submitted for the aforementioned and other expenses including toll charges, parking fees, tips, and business related expenses not elsewhere specified. Other non-business related expenses are not reimbursable.

Combining Official and Vacation Travel

When official and vacation travel are combined, delineation of costs are to be determined with the supervisor prior to the trip.

Travel By Air

Travel by air should be conducted in the most expeditious and effective way. Economy, coach, tourist fare, or other similar accommodations should be used for all airline travel. Any circumstances (i.e., emergency, availability, etc.) necessitating first-class air travel must be explained on a separate sheet and accompany the travel expense report. Airline reservations will be made by designated district staff. If an individual decides to drive rather than travel by air, the lesser of the mileage or air costs, as determined by the district, will be provided.

Travel & Miscellaneous Expenses Paid By Others

If both the district and an outside organization make payment, the employee must reimburse the district for any duplicate payment.

Credit Cards

The district may wish to assign a district-owned credit card for expenses to an employee when he or she is traveling. Such an assignment will be made by the business manager when it is deemed appropriate.

Medford School District 549C

Code: DLC-AR
Revised/Reviewed: xx/xx/xx

Staff Expense Reimbursement

Expense reimbursement for staff traveling on approved district business will be governed by the following procedures. Travel expenses include travel fares, meals and lodging and expenses incident to travel. Only travel expenses as are ordinary and necessary in the conduct of approved travel for district business purposes and directly attributable to it will be reimbursed. As used in this regulation an “ordinary” expense means one that is common and accepted in the profession; a “necessary” expense means one that is essential and appropriate in order to conduct district business. Reimbursement procedures established by the district will also apply to Board members traveling on district business, as applicable.

In-District Travel – Use of Private Vehicles

1. Travel in a private vehicle for the purpose of conducting district business may be approved when:
 - a. A district vehicle is not available;
 - b. The destination is not conveniently accessible by commercial carrier;
 - c. Various points must be visited and commercial carrier schedules are such that the use of commercial carrier transportation is not practical;
 - d. Carrying articles by commercial carrier would not be feasible;
 - e. Commercial travel is deemed to be less economical.

Out-of-District Travel (In-state) – Use of Private Vehicles

Private vehicles may be used only with prior approval from the employee’s supervisor. Out-of-district travel approval may be granted by the superintendent or designee for individual trips or by blanket approval, as deemed appropriate.

Out-of-State Travel

Out-of-state travel requires prior approval from the Superintendent or designee.

Insurance Coverage

1. Insurance costs are included as part of the mileage reimbursement for employees authorized to use a private vehicle to conduct district business. It is the responsibility of the owner or driver of the vehicle to be certain that the vehicle is adequately covered by insurance in accordance with Oregon statutes.
2. The responsibility of the district for damages resulting from vehicle accidents is not the same as set forth in the district’s general liability insurance policy. The employee’s insurance coverage provides primary coverage when the employee is driving the employee’s own vehicle on approved district business.

Meals and Meetings

1. Reimbursement will be made for ordinary and necessary meal expenses incurred in the course of approved travel for district business. Meals include amounts spent for food, beverage, taxes and related gratuities. Alcoholic beverages will not be reimbursed by the district. See **Expense Reimbursement Request and Accounting Procedures** below.
2. Expenses in excess of the district's established **per diem** limit(s) are ordinarily the responsibility of the employee and may be reimbursed only with approval from the superintendent or designee. Receipts for all meal expenses must be secured and attached to the claim if the employee is requesting reimbursement in excess of per diem.

Travel Advances

1. A travel advance may be requested when the estimated cost for meals, lodging, etc., exceeds \$50. The travel advance may be requested by completing the **Travel Authorization and Expense Report (TAER)** form provided by the district. This form must be approved by the employees supervisors in advance of getting the advance or traveling.
2. The cost of commercial travel tickets will not be included in a cash advance request.
3. In the event of loss, the employee is personally responsible for cash advances issued and for any third party use of a district-provided credit card.
4. At least 15 working days are required for processing an advance check after the approved request is received by the business office.
5. Only one cash advance may be outstanding to any employee at any time.

Reservations, Commercial Carrier and Lodging

1. Travel must be conducted in the most expeditious and cost-effective manner, as determined by the district.
2. Each employee is responsible for making their own reservations ~~by obtaining a purchase order number from the business office and furnishing that number to the local travel agency or commercial carrier.~~ only after getting their TAER form approved.

Vehicle Rentals

1. Rental vehicles may be used only when use will affect a savings or otherwise be more advantageous to the district or when the use of other transportation is not feasible.
2. Rental of a compact vehicle is recommended when suitable for approved district business because of the lower initial rate and the guaranteed rate. Certain rental agencies guarantee the compact rate in all owned stations and in most licensee stations, which means that if a reservation for a compact vehicle is accepted and one is not available, a standard-sized vehicle will be substituted at the compact rate

3. Rental vehicles will be used only for official travel or in lieu of taxi for necessary travel. Any additional costs incurred for other usage will be the personal responsibility of the traveler.
4. Employees will be informed if the district carries the rental car endorsement as part of its insurance coverage. In the event the district does not carry the rental car endorsement the employee will be authorized to purchase insurance coverage from the rental agency.

Cancelled Trips

1. If an employee cannot leave at the scheduled time, it is the employee's responsibility to call the travel agency or carrier and arrange to have the tickets cancelled or exchanged.
2. Commercial carrier reservation cancellations must be made at least 24 hours before departure time, whenever possible.
3. Lodging reservations must be cancelled by the employee as soon as possible to avoid a cancellation charge.
4. If a trip is cancelled after an advance and/or tickets have been issued, the advance and tickets must be returned to the business office immediately.

Personal Travel Combined with District Business Travel

1. If an individual traveling on approved district business engages in both business and personal activities, travel expenses incurred will be reimbursed only for expenses that are ordinary and necessary in the conduct of district business. Expenses incurred as a part of personal business are the sole responsibility of the traveler. **There should be a clear delineation of costs between business and personal approved by the supervisor prior to travel**
2. When personal travel is combined with approved district business travel and the individual is traveling by less than the most expeditious and cost-effective manner, any additional costs must be paid by the traveler.
3. Time away from work caused by traveling by less than the most expeditious means available for personal purposes must be charged to vacation or other appropriate leave.
4. Vacation or other personal leave may be taken in conjunction with approved district travel subject to the following:
 - a. Time delays related to approved district business are charged as working time even if no work is performed;
 - b. If the employee travels by less than the most cost-effective manner, as determined by the district, for approved district business or for personal travel combined with travel for district business purposes, the employee must pay the additional cost (e.g., increased fare, meals, lodging expenses, etc.) incurred as a result of the personal travel;
 - c. All subsistence and local transportation (e.g., taxi, vehicle fare) while on vacation status or other appropriate leave must be paid by the employee;
 - d. The traveler will not be required to pay any of the basic transportation costs incurred as a part of the approved district business, even though the traveler spends a substantial part of the total

- time away from home on vacation or other personal leave, provided the employee was traveling on approved district business;
- e. A traveler who decides on their own to conduct district business without prior approval, while on vacation or other personal leave, cannot then use this as a justification to have the district pay basic transportation cost from the district to the location visited, or submit a request for other expense reimbursement.

Expense Reimbursement Request and Accounting Procedures

1. Reimbursement requests detailing actual expenditures must be submitted on the district's **Travel Authorization and Expense Report (TAER) form** and approved by **their supervisor** in writing. Receipts and supporting documentation must accompany all expense reimbursement requests. This includes, but is not limited to, receipts for transportation, lodging, meals, registration, conference and workshop fees. All requests must be submitted to the district office within 10 working days of the conclusion of the trip.
 - a. If the completed travel expense report totals less than the travel advance, the difference must be returned within 10 working days to the business office with the report.
 - b. Reimbursement for expenditures in excess of a travel advance, or where no travel advance has been requested, will be made within 30 working days after the approved travel expense report is received by the business office.
2. Expenses which consist primarily of the cost of furnishing meals for others will be reimbursed upon submission of a TAER form which includes:
 - a. Names of guests;
 - b. Organizations involved;
 - c. Full explanation of the district business purpose of the meeting.
3. In the event a vehicle was rented, a copy of the rental agreement must be attached to the travel expense report. The rental charge should be paid from the amount advanced, as applicable. Purchase of gas and oil which have been deducted from the rental charge by the rental agency must be included.
4. Any claim for mileage reimbursement only may be submitted at the end of each month in which reimbursement is to be claimed. A claim must be submitted no later than 90 calendar days of incurring the expense. Reimbursement claims later than 90 calendar days of the expense will be denied.
5. Mileage for approved district business travel in a private vehicle will be reimbursed at the current rate per mile established by the district, collective bargaining agreement or Internal Revenue Service (IRS), as applicable. Reimbursement that exceeds the IRS rate will be included as income to the employee in accordance with IRS regulations.
6. Meal expenses for approved district business travel purposes may be reportable as income to the employee in accordance with IRS regulations. Generally, meal expenses incurred for approved district business purposes in which district business is conducted with at least one or more other persons or that is incurred on approved district business for a trip that is overnight, or long enough

that the individual needs to stop for sleep or rest to properly perform assigned duties, as defined by the IRS, will not be reportable as income to the employee.

7. In the event the total of the amount charged to, and/or received from, the district by the employee as advances, reimbursement or otherwise, exceeds the ordinary and necessary business expenses, the excess must be reported as income in accordance with IRS requirements.

Reimbursable Expense Limitations

1. ~~The district may establish a daily per diem rate that covers all meal expenses.~~ Meal expenses may be reimbursed subject to the Standard Rate as published by the U.S. General Services Administration (GSA) annually, typically October 1st of each year. Current rates can be found at this link.

https://www.gsa.gov/travel/plan-book/per-diem-rates/per-diem-rates-results?action=perdiems_report&fiscal_year=2027&state=OR&city=&zip=

2. Incidental Expense include:
 - a. Fees and tips for porters and baggage carriers
 - b. Tips for hotel staff (such as bellhops or housekeepers)
 - c. No receipts are need for incidentals
3. Gratuities must not exceed 15 percent and must be included as a part of the receipt. Gratuities in excess of 15 percent are the responsibility of the employee and will not be reimbursed by the district.
4. Other expenses such as toll charges, parking fees, valet services, cleaning, pressing and laundry may be reimbursed if length of trip or circumstances demand.
5. Mileage reimbursement for actual miles traveled on district business, may be approved subject to the following limitations:
 - a. In-district mileage reimbursement will not be granted to an employee, other than a district-approved tutor, for traveling from the employee's residence to the place where work begins for the day or for returning home from the last place worked during the day; In-district mileage reimbursement is limited to actual miles traveled between district worksites or other locations while conducting authorized district business. Commuting mileage between an employee's residence and the first or final work location of the day is not reimbursable.
 - b. Reimbursement will be made only for those miles actually traveled in the course of completing approved district business. When chauffeured, mileage for two round trips and short-term parking will be reimbursed if not greater than the cost of one round trip plus economy parking;
 - c. Group travel may be requested on one travel request form for a group traveling together as long as advance and reimbursement is payable to one person who has complete responsibility for reporting expenses;
 - d. In the event a private vehicle is approved for use from home, to or from airport or railroad station, mileage for one round trip and economy parking will be reimbursed. Parking receipts are required;
 - e. Individuals requesting reimbursement for use of a private vehicle on approved district business must meet insurance requirements. See **Insurance Coverage** above.

6. Lodging will be reimbursed at reasonable, cost effective commercial rates.
7. Local taxi, shuttle, bus fares and vehicle rentals may be reimbursed, subject to the district's requirement that travel selected is by the most expeditious, cost-effective manner, as determined by the district.
8. An employee may not receive duplicate payment or reimbursement for the same expense. If another organization pays or reimburses an expense that has also been paid or reimbursed by the district, the employee must promptly notify the district and return any duplicate amount to the district.

Medford School District 549C

Code: DLC-AR
Revised/Reviewed: xx/xx/xx

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 - c. Various points must be visited and commercial carrier schedules are such that the use of commercial carrier transportation is not practical;
 - d. Carrying articles by commercial carrier would not be feasible;
 - e. Commercial travel is deemed to be less economical.

Out-of-District Travel (In-state) – Use of Private Vehicles

Private vehicles may be used only with prior approval from the employee’s supervisor. Out-of-district travel approval may be granted by the superintendent or designee for individual trips or by blanket approval, as deemed appropriate.

Out-of-State Travel

Out-of-state travel requires prior approval from the Superintendent or designee.

Insurance Coverage

1. Insurance costs are included as part of the mileage reimbursement for employees authorized to use a private vehicle to conduct district business. It is the responsibility of the owner or driver of the vehicle to be certain that the vehicle is adequately covered by insurance in accordance with Oregon statutes.
2. The responsibility of the district for damages resulting from vehicle accidents is not the same as set forth in the district’s general liability insurance policy. The employee’s insurance coverage provides primary coverage when the employee is driving the employee’s own vehicle on approved district business.

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2. The cost of commercial travel tickets will not be included in a cash advance request.
3. In the event of loss, the employee is personally responsible for cash advances issued and for any third party use of a district-provided credit card.
4. At least 15 working days are required for processing an advance check after the approved request is received by the business office.
5. Only one cash advance may be outstanding to any employee at any time.

Reservations, Commercial Carrier and Lodging

1. Travel must be conducted in the most expeditious and cost-effective manner, as determined by the district.
2. Each employee is responsible for making their own reservations only after getting their TAER form approved.

Vehicle Rentals

1. Rental vehicles may be used only when use will affect a savings or otherwise be more advantageous to the district or when the use of other transportation is not feasible.
2. Rental of a compact vehicle is recommended when suitable for approved district business because of the lower initial rate and the guaranteed rate. Certain rental agencies guarantee the compact rate in all owned stations and in most licensee stations, which means that if a reservation for a compact vehicle is accepted and one is not available, a standard-sized vehicle will be substituted at the compact rate

3. Rental vehicles will be used only for official travel or in lieu of taxi for necessary travel. Any additional costs incurred for other usage will be the personal responsibility of the traveler.
4. Employees will be informed if the district carries the rental car endorsement as part of its insurance coverage. In the event the district does not carry the rental car endorsement the employee will be authorized to purchase insurance coverage from the rental agency.

Cancelled Trips

1. If an employee cannot leave at the scheduled time, it is the employee's responsibility to call the travel agency or carrier and arrange to have the tickets cancelled or exchanged.
2. Commercial carrier reservation cancellations must be made at least 24 hours before departure time, whenever possible.
3. Lodging reservations must be cancelled by the employee as soon as possible to avoid a cancellation charge.
4. If a trip is cancelled after an advance and/or tickets have been issued, the advance and tickets must be returned to the business office immediately.

Personal Travel Combined with District Business Travel

1. If an individual traveling on approved district business engages in both business and personal activities, travel expenses incurred will be reimbursed only for expenses that are ordinary and necessary in the conduct of district business. Expenses incurred as a part of personal business are the sole responsibility of the traveler. There should be a clear delineation of costs between business and personal approved by the supervisor prior to travel
2. When personal travel is combined with approved district business travel and the individual is traveling by less than the most expeditious and cost-effective manner, any additional costs must be paid by the traveler.
3. Time away from work caused by traveling by less than the most expeditious means available for personal purposes must be charged to vacation or other appropriate leave.
4. Vacation or other personal leave may be taken in conjunction with approved district travel subject to the following:
 - a. Time delays related to approved district business are charged as working time even if no work is performed;
 - b. If the employee travels by less than the most cost-effective manner, as determined by the district, for approved district business or for personal travel combined with travel for district business purposes, the employee must pay the additional cost (e.g., increased fare, meals, lodging expenses, etc.) incurred as a result of the personal travel;
 - c. All subsistence and local transportation (e.g., taxi, vehicle fare) while on vacation status or other appropriate leave must be paid by the employee;
 - d. The traveler will not be required to pay any of the basic transportation costs incurred as a part of the approved district business, even though the traveler spends a substantial part of the total

- time away from home on vacation or other personal leave, provided the employee was traveling on approved district business;
- e. A traveler who decides on their own to conduct district business without prior approval, while on vacation or other personal leave, cannot then use this as a justification to have the district pay basic transportation cost from the district to the location visited, or submit a request for other expense reimbursement.

Expense Reimbursement Request and Accounting Procedures

1. Reimbursement requests detailing actual expenditures must be submitted on the district's Travel Authorization and Expense Report (TAER) form and approved by their supervisor in writing. Receipts and supporting documentation must accompany all expense reimbursement requests. This includes, but is not limited to, receipts for transportation, lodging, meals, registration, conference and workshop fees. All requests must be submitted to the district office within 10 working days of the conclusion of the trip.
 - a. If the completed travel expense report totals less than the travel advance, the difference must be returned within 10 working days to the business office with the report.
 - b. Reimbursement for expenditures in excess of a travel advance, or where no travel advance has been requested, will be made within 30 working days after the approved travel expense report is received by the business office.
2. Expenses which consist primarily of the cost of furnishing meals for others will be reimbursed upon submission of a TAER form which includes:
 - a. Names of guests;
 - b. Organizations involved;
 - c. Full explanation of the district business purpose of the meeting.
3. In the event a vehicle was rented, a copy of the rental agreement must be attached to the travel expense report. The rental charge should be paid from the amount advanced, as applicable. Purchase of gas and oil which have been deducted from the rental charge by the rental agency must be included.
4. Any claim for mileage reimbursement only may be submitted at the end of each month in which reimbursement is to be claimed. A claim must be submitted no later than 90 calendar days of incurring the expense. Reimbursement claims later than 90 calendar days of the expense will be denied.
5. Mileage for approved district business travel in a private vehicle will be reimbursed at the current rate per mile established by the district, collective bargaining agreement or Internal Revenue Service (IRS), as applicable. Reimbursement that exceeds the IRS rate will be included as income to the employee in accordance with IRS regulations.
6. Meal expenses for approved district business travel purposes may be reportable as income to the employee in accordance with IRS regulations. Generally, meal expenses incurred for approved district business purposes in which district business is conducted with at least one or more other persons or that is incurred on approved district business for a trip that is overnight, or long enough

that the individual needs to stop for sleep or rest to properly perform assigned duties, as defined by the IRS, will not be reportable as income to the employee.

7. In the event the total of the amount charged to, and/or received from, the district by the employee as advances, reimbursement or otherwise, exceeds the ordinary and necessary business expenses, the excess must be reported as income in accordance with IRS requirements.

Reimbursable Expense Limitations

1. Meal expenses may be reimbursed subject to the Standard Rate as published by the U.S. General Services Administration (GSA) annually, typically October 1st of each year. Current rates can be found at this link.

https://www.gsa.gov/travel/plan-book/per-diem-rates/per-diem-rates-results?action=perdiems_report&fiscal_year=2027&state=OR&city=&zip=

2. Incidental Expense include:
 - a. Fees and tips for porters and baggage carriers
 - b. Tips for hotel staff (such as bellhops or housekeepers)
 - c. No receipts are need for incidentals
3. Gratuities must not exceed 15 percent and must be included as a part of the receipt. Gratuities in excess of 15 percent are the responsibility of the employee and will not be reimbursed by the district.
4. Other expenses such as toll charges, parking fees, valet services, cleaning, pressing and laundry may be reimbursed if length of trip or circumstances demand.
5. Mileage reimbursement for actual miles traveled on district business, may be approved subject to the following limitations:
 - a. In-district mileage reimbursement will not be granted to an employee, other than a district-approved tutor, for traveling from the employee's residence to the place where work begins for the day or for returning home from the last place worked during the day; In-district mileage reimbursement is limited to actual miles traveled between district worksites or other locations while conducting authorized district business. Commuting mileage between an employee's residence and the first or final work location of the day is not reimbursable.
 - b. Reimbursement will be made only for those miles actually traveled in the course of completing approved district business. When chauffeured, mileage for two round trips and short-term parking will be reimbursed if not greater than the cost of one round trip plus economy parking;
 - c. Group travel may be requested on one travel request form for a group traveling together as long as advance and reimbursement is payable to one person who has complete responsibility for reporting expenses;
 - d. In the event a private vehicle is approved for use from home, to or from airport or railroad station, mileage for one round trip and economy parking will be reimbursed. Parking receipts are required;
 - e. Individuals requesting reimbursement for use of a private vehicle on approved district business must meet insurance requirements. See **Insurance Coverage** above.

6. Lodging will be reimbursed at reasonable, cost effective commercial rates.
7. Local taxi, shuttle, bus fares and vehicle rentals may be reimbursed, subject to the district's requirement that travel selected is by the most expeditious, cost-effective manner, as determined by the district.
8. An employee may not receive duplicate payment or reimbursement for the same expense. If another organization pays or reimburses an expense that has also been paid or reimbursed by the district, the employee must promptly notify the district and return any duplicate amount to the district.

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