

Board of Directors Meeting
School District 4J, Lane County
Hybrid Meeting (virtual and in-
person)
200 North Monroe Street
Eugene, Oregon 97402
Tuesday, March 11, 2025

<https://4j-lane-edu.zoom.us/j/93827537746?pwd=ama3HHMyt903mKTYRNq25FWt1pSNAo.1>

Passcode: 8675309

Meeting ID: 938 2753 7746

6:00 PM

Budget Informational Meeting

- I. Introductions
- II. Presentation 2
 - 1. Budget Roles and Dates
 - 2. Budget Roadshow
 - 3. 2025-2026 Budget Preparation
 - 4. Questions & Discussion
- III. Adjourn

INTERPRETERS FOR THE DEAF AND HARD OF HEARING:

To request interpreter services for this meeting, please call (541) 790-7850 or TDD (541) 790-7712 or the TDD Relay Number 1 (800) 735-2900

3/11/25
6:00 PM

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Budget Committee Informational Meeting





AGENDA

- ❖ Introductions
- ❖ Budget Roles and Dates
- ❖ Budget Roadshow (*Updated*)
- ❖ FY26 Budget
- ❖ Questions & Discussion

Questions Along The Way...



- Please ask questions, but let's be conscious about our time. Tonight we will share a lot of information and there may not be adequate time to answer all questions.
- If there is time at the end, we can respond to some questions or discussion.
 - Written/emailed questions can always be sent to brown_mat@4j.lane.edu
 - Questions/Responses will be shared with the entire committee prior to the next meeting and will be shown as an agenda topic item.

Budget Committee Basics



Budget Committee Members

Composed of the School Board &
an equal number of electors appointed by the School Board

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Budget Committee Member Requirements

- Cannot be officers, agents, or employees of the district
- Must be registered voters within the district boundary
- All members are appointed to staggered 3-year terms
- 1 Member must be on the equity advisory committee

Budget Committee Basics



Legislative Intent of Oregon's Local Budget Law (ORS 294.321)

- Establish standard procedures and process
- Describe programs and policies
- Estimate revenues and expenditures
- Transparency with community input/involvement
- Provide control from overspending
- Tell the financial story in a standardized format
- Budget law is all about appropriations
- Budget laws are built with transparency in mind
- Statutes and Administrative Rules are the guide

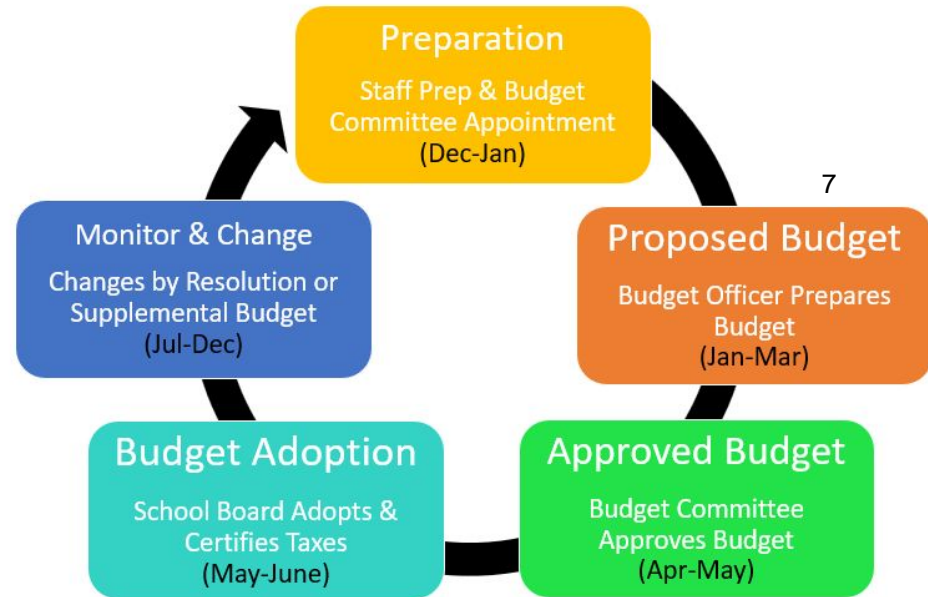
Budget Committee Basics



Who Creates a Budget?

The budget is

- > **Proposed** by Staff
- > **Approved** by Budget Committee
- > **Adopted** by School Board



Budget Committee Goals



- ❖ Budget Message
 - Did the message explain the document and cover important topics?
 - Did the message explain major changes and reasoning?
 - Did the message explain forecasting and trends that helped build the budget?

- ❖ Balanced Budget
 - Do revenues = expenditures?

- ❖ Does the budget reflect the goals of the School Board?
 - Does the budget reflect the values of the school board?
 - If not, what recommendations would you make to the school board?

- ❖ At the end of the day, the Budget Committee approves 2 motions
 - Property tax rates for Debt Service payments
 - Approving the FY 2026 Budget

Last Year Recommendations 4J

- 1) Seek clarity from the Board on budget/spending priorities
- 2) Initiate a Board discussion and approval of an updated reserve policy
- 3) Review and improve the budget process for the next budget cycle
 - a) Align presentations to budget/spending priorities
 - b) Deliver Proposed Budget Document at the first Budget Committee Meeting
 - c) Clarify purpose, scope, authority of the Committee and Board

Budget Committee Dates



03/11 - Tues - Informational Meeting

04/04 - Fri - Proposed Budget Finalized and sent out to committee members

04/15 - Tues - Budget Committee Meeting 1

(Areas: Private Trust, Insurance Reserves, Debt Service, Capital, Special Purpose)

04/22 - Tues - Budget Committee Meeting 2

(Areas: Special Purpose and General Fund)

04/29 - Tues - Budget Committee Meeting 3

(Areas: General Fund & Budget Approval)

05/07 - School Board Public Hearing

05/21 - School Board Adoption

Input & Discussion

Starting @ 5:00, 5:30, or 6:00 PM

Food & Snacks for members

Public Comment



2025 Budget Roadshow

Updated

Budget Buckets



100 General Fund

Property Taxes
State Rev.
Local Levy

General operating
expenses

50% of
FY25 Budget

200s Special Purpose

Grants, IDEA, IG,
Nutrition, Student
Body

Mainly Grant
expenses

11% of
FY25 Budget

300s Debt Service

Debt Payments

Bond Payments

9% of
FY25 Budget

400s Capital Projects

Bonds and
Capital Funds

New buildings,
improvements and
maintenance

22% of
FY25 Budget

600s Insurance Reserves

Internal Funds

Insurance,
Workers Comp,
Unemployment

8% of
FY25 Budget

780 Private Trust

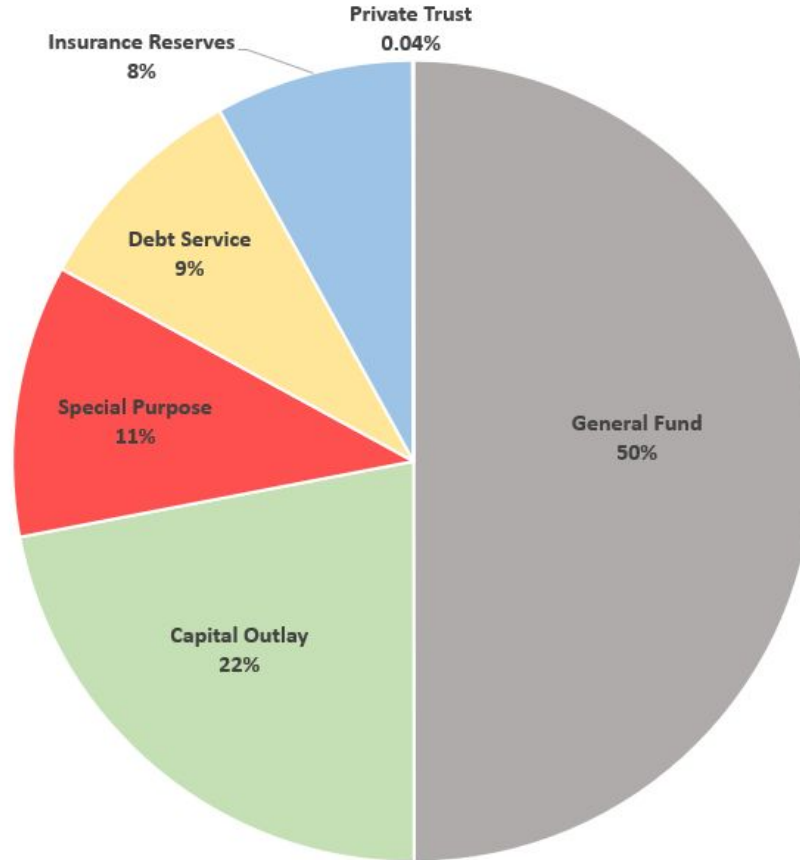
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Private Donations

Targeted expenses

0.04% of
FY25 Budget

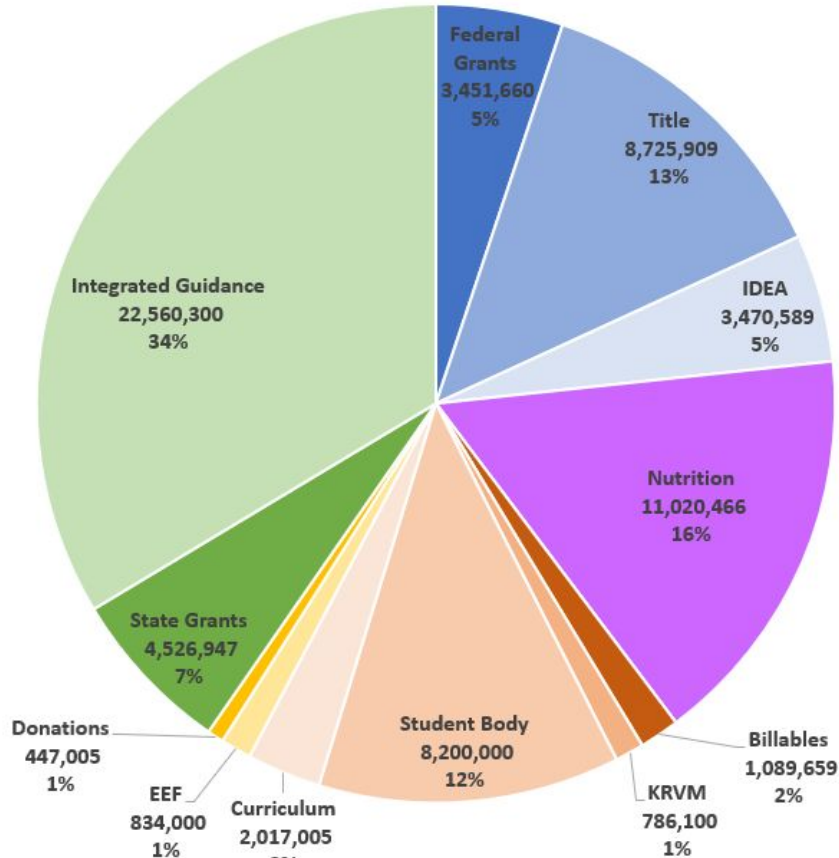
FY25 Budget Breakdown



FY25 Budget
\$602 M

General Fund
\$299 M

FY25 Special Purpose



200 Funds FY25

Federal	15.6M
State	27.1M
Private	1.3M
Other	12.1M
<u>Nutrition</u>	<u>11.0M</u>
Total	67.1M

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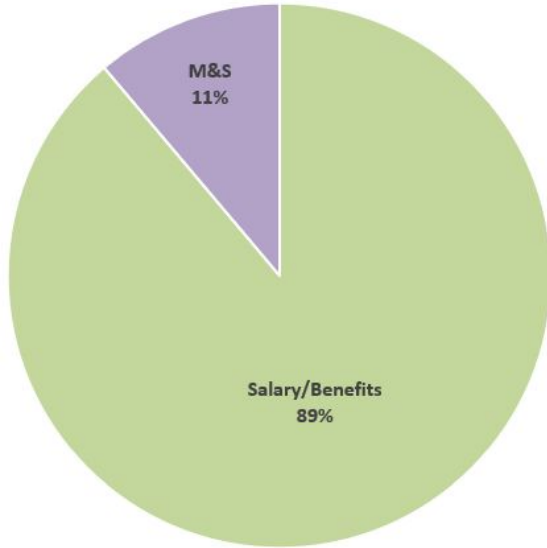
Nutritional Services

Federal	5.7M
State	1.1M
Cater/Other	0.2M
Beg. Bal.	0.8M
<u>General</u>	<u>3.2M</u>
Total	11.0M

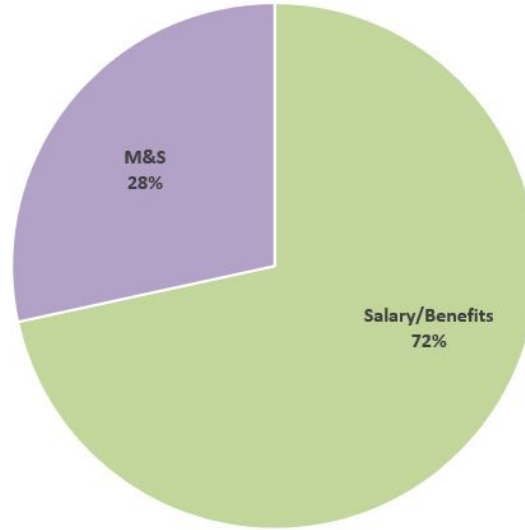
How we Spend Money



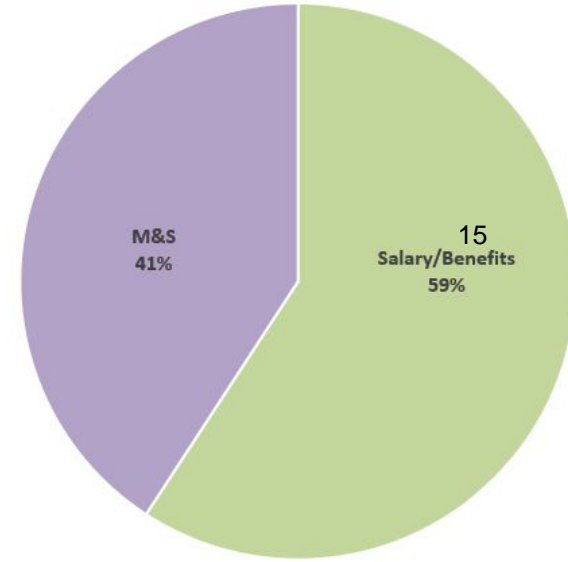
General Fund



200 Funds



All Funds



State School Fund



District 2 drops 50%

All Districts drop evenly

BASE SCENARIO			
SSF = \$1,000,000			
	Enrollment	%	SSF Amt
District 1	1,000	33%	333,333
District 2	800	27%	266,667
District 3	600	20%	200,000
District 4	400	13%	133,333
District 5	200	7%	66,667
	3,000	Total State Enrollment	

SCENARIO - 1 School Drops			
SSF = \$1,000,000			
	Enrollment	%	SSF Amt
District 1	1,000	38%	384,615
District 2	400	15%	153,846
District 3	600	23%	230,769
District 4	400	15%	153,846
District 5	200	8%	76,923
	2,600	Total State Enrollment	

SCENARIO - All Schools Drop			
SSF = \$1,000,000			
	Enrollment	%	SSF Amt
District 1	800	33%	333,333
District 2	640	27%	266,667
District 3	480	20%	200,000
District 4	320	13%	133,333
District 5	160	7%	66,667
	2,400	Total State Enrollment	

Primary GF Revenue Sources



State School Fund Formula

General Purpose Grant (GPG)

$((TE*25)+4500)*Extnd\ ADMw*funding\ ratio$

Total Formula Revenue (TFR)

(GF revenue coming to the District)

GPG + Transportation Grant

State School Fund Grant

TFR - Local Revenue

TFR is Approx. \$203M in FY 25

Local Option Revenue

Renews Every 5 Years

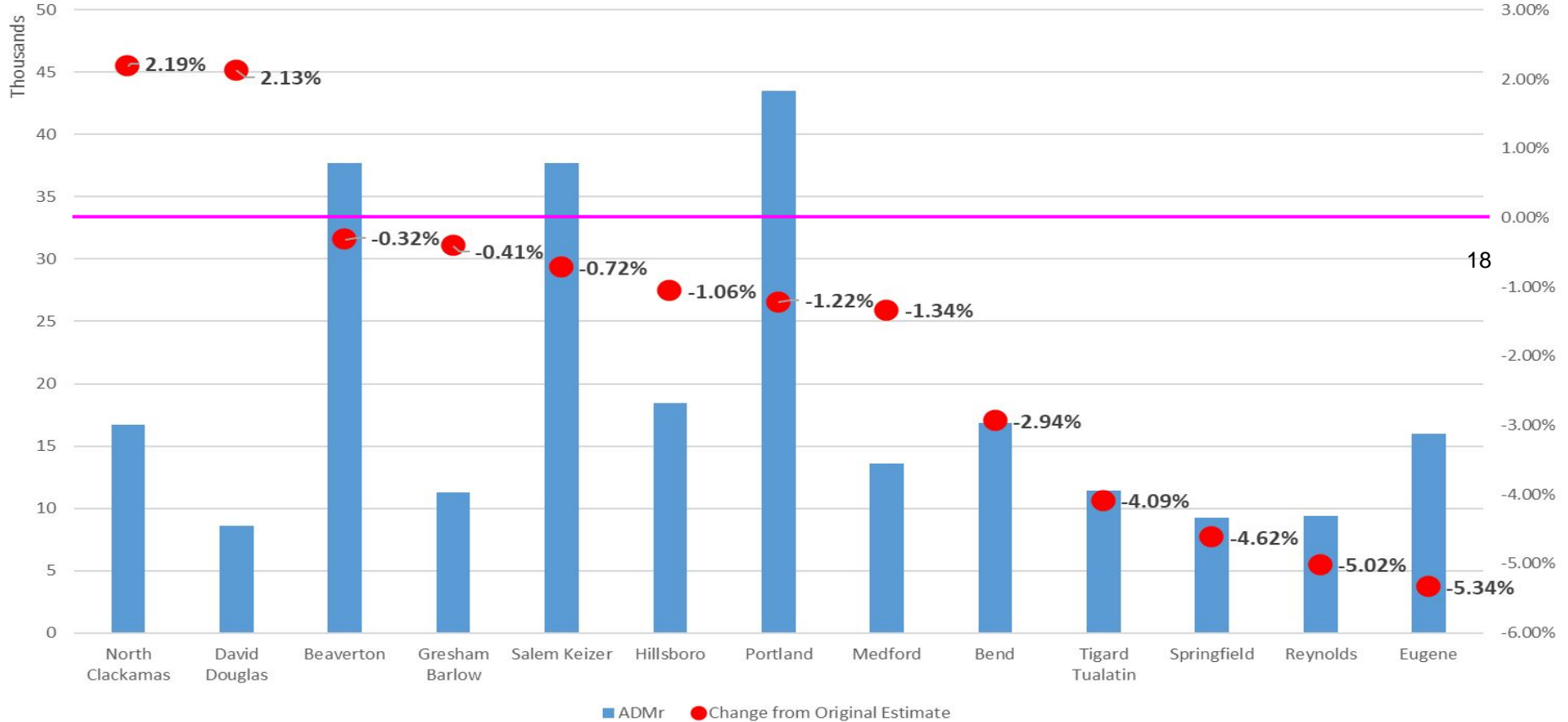
- ❖ Voter approved for years ending in 5 and 0.
- ❖ Not included in the local revenue calculation for SSF.

Currently provides about \$27M

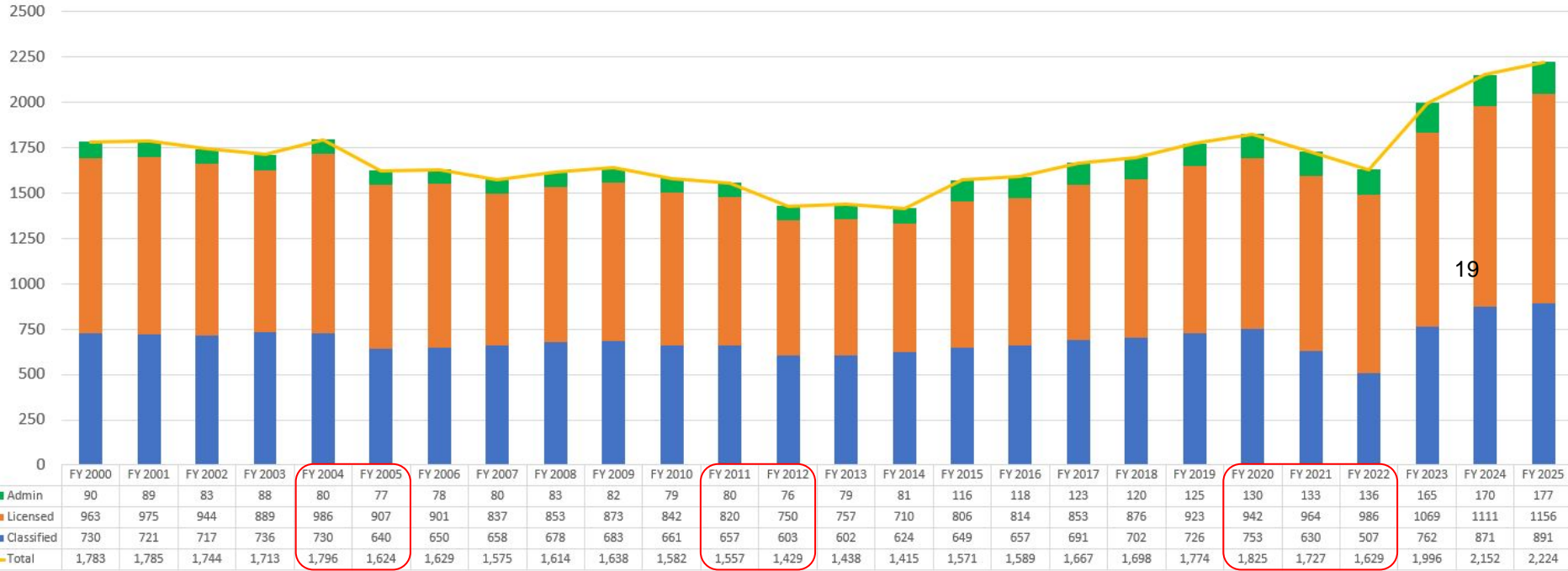
17

\$0.89 of every \$1.00 pays for people.

FY24 Enrollment



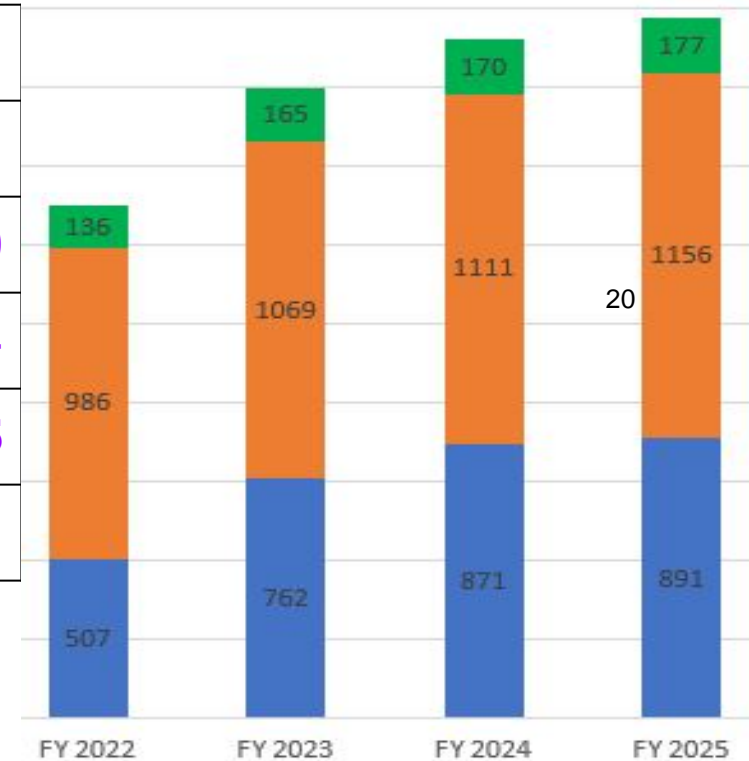
25 Years of Staffing



The Last Quadrennium

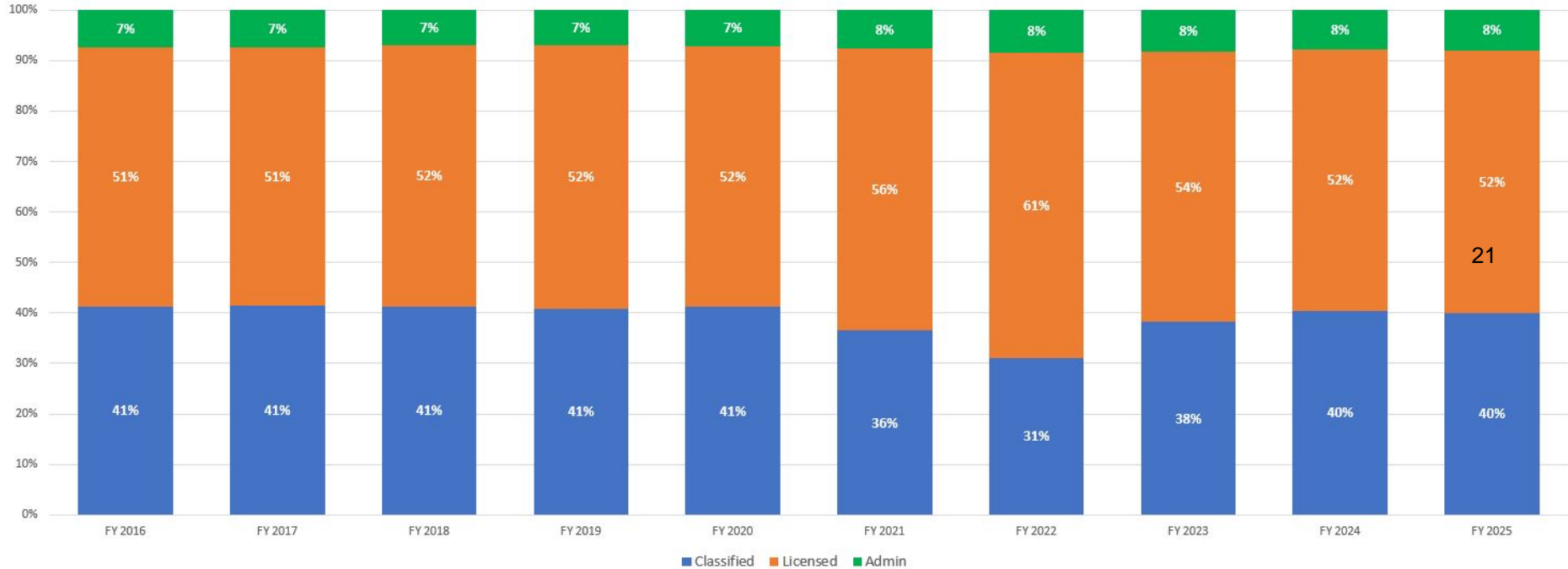


FTE	<u>21/22</u>	<u>22/23</u>	<u>23/24</u>	<u>24/25</u>	
MAPS/Adm	136	165	170	177	+41
Licensed	986	1,069	1,111	1,156	+170
Classified	507	762	871	891	+384
TOTAL	1,629	1,996	2,152	2,224	+595
		+367	+156	+72	



❖ Does not include vacancies

10 Year Staffing Breakout



Vacancies within 4J



<u>Licensed Vacancies</u>	<u>FTE</u>
Counselor	1.0
Teacher	6.0
Special Education	13.2
Total Vacancies	20.2

<u>Classified Vacancies</u>	<u>FTE</u>
Nutrition	7.9
Safety	1.0
Business Operations	6.0
Special Education	37.8
Transportation	33.5
Facilities	17.7
Technology	5.0
School Allocations & Other	12.6
Total Vacancies	121.5

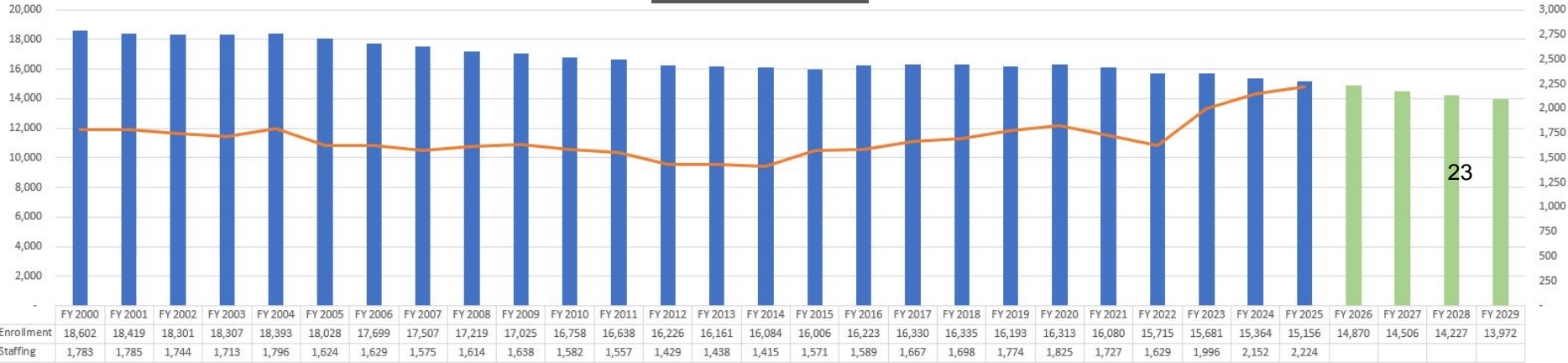
<u>MAPS Vacancies</u>	<u>FTE</u>
Fac/Tech/Transp.	5.0
District Ops (HR/Fin/Supt)	4.0
Special Education	2.0
School MAPS	²² 1.0
Total Vacancies	12.0

Snapshot in Nov 2024

Enrollment and Staffing



Last 25 Years



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ESSER Effects



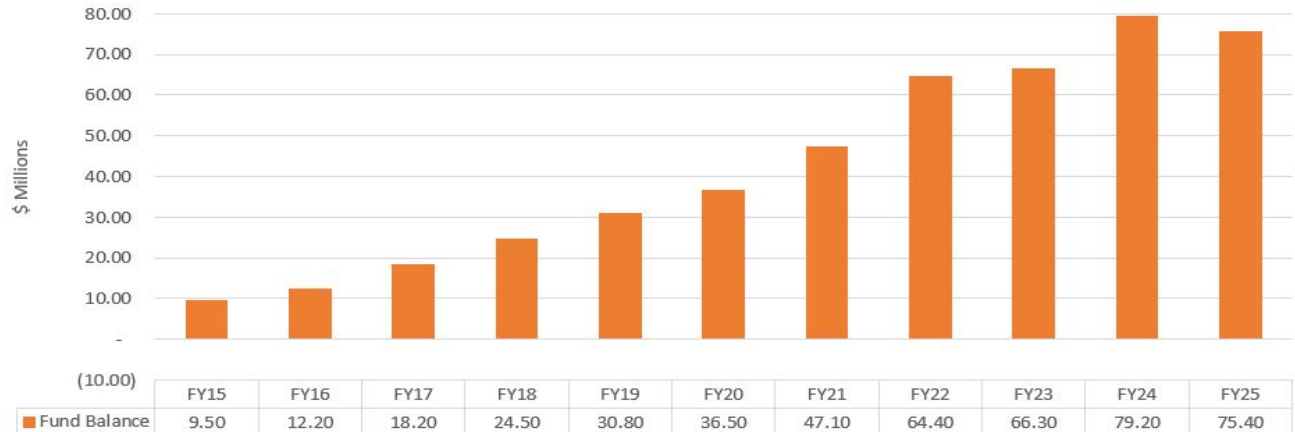
ESSER Funding

Esser I	3.2M
Esser II	16.5M
<u>Esser III</u>	<u>36.9M</u>
Total	56.6M

<u>ESSER Spending</u>	<u>21/22</u>	<u>22/23</u>	<u>23/24</u>	<u>24/25</u>	<u>Totals</u>	<u>%</u>
Salaries/Benefits	8.0	6.3	10.4	1.9	26.6	47%
M&S & Capital	11.7	8.1	9.3	0.9	30.0	53%
TOTALS	19.7	14.4	19.7	2.8	56.6	

ESSER Transfers from GF

- Salaries/Benefits
- Materials/Services
- Utilities
- Contracts
- Supplies





The Economy From an Economist Point of View

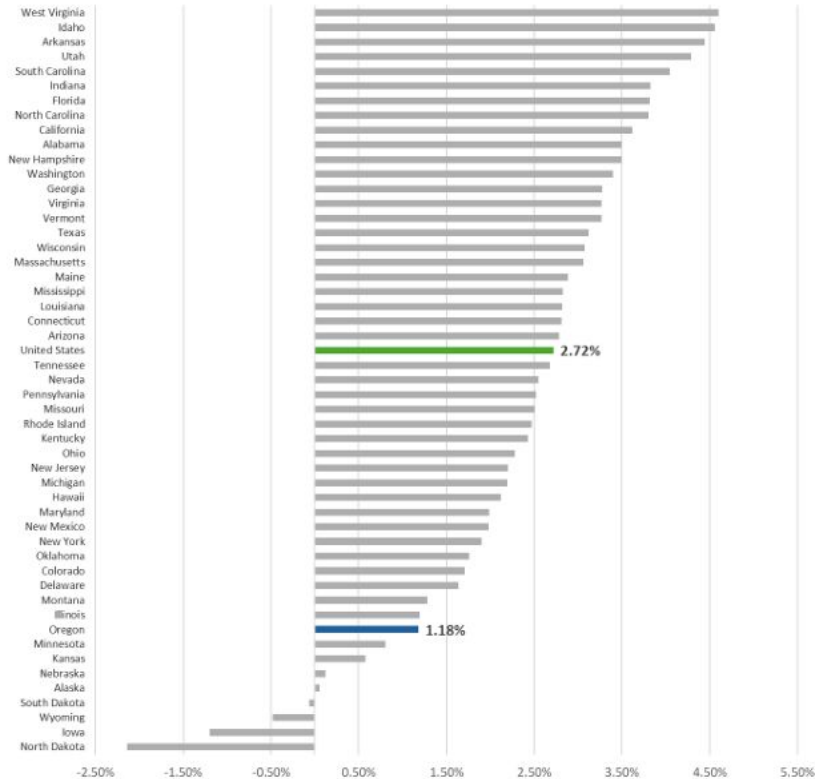
Oregon

Oregon Economist



Quarterly GDP Growth in All Industries

Oregon vs. U.S and other states, (SAAR, Chn.2017\$) % Change - Year to Year



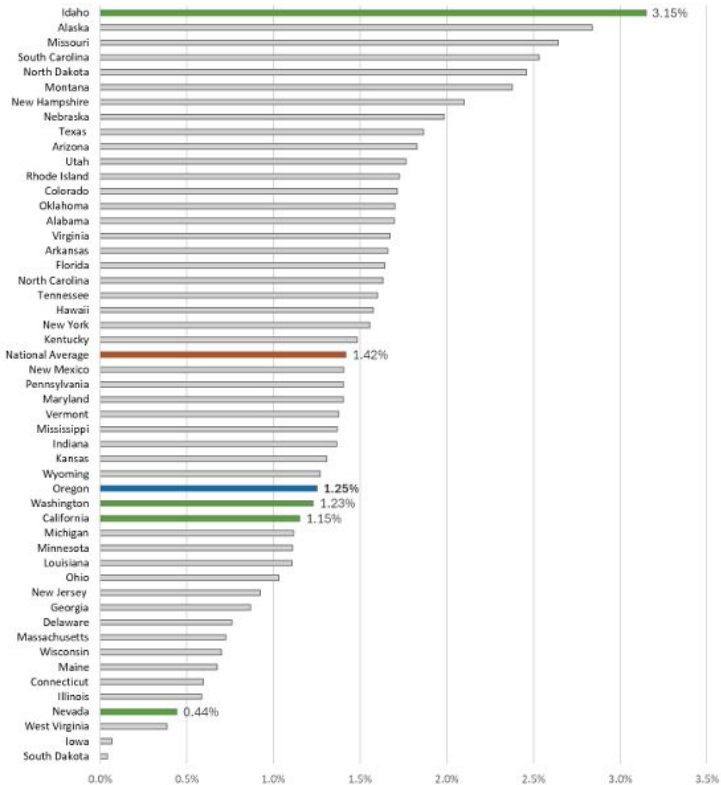
2024Q3: GDP growth
OR ranks **42nd**

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Oregon Economist



Total Nonagricultural Employment Growth (November 2024)
Oregon vs. Other States, Non-seasonally adjusted, % Change - Year to Year



Oregon ranks **32nd** in job creation

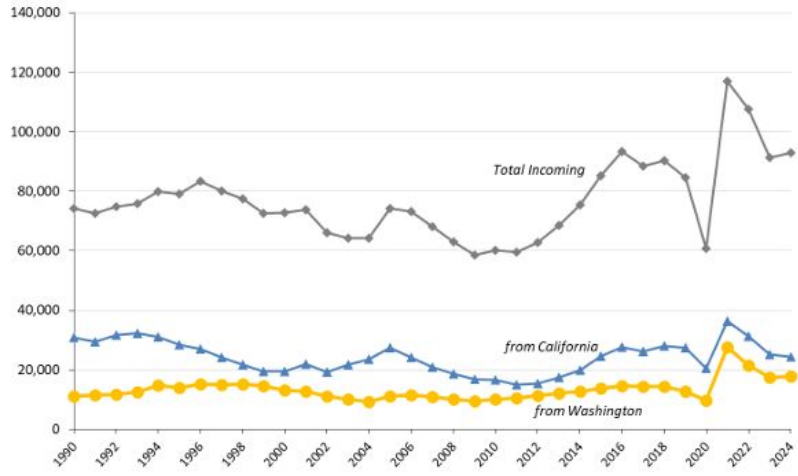
Data: Nov 2024 | Source: BLS, Haver Analytics, Oregon Office of Economic Analysis

Oregon Economist



Who's coming to Oregon?

Out-of-State Driver Licenses Surrendered in Oregon
Calendar Year Totals for **California** and **Washington**



Data: Dec '24 | Source: Oregon Driver and Motor Vehicle Services

California and **Washington** residents make up the largest portion of people surrendering licenses in Oregon

45% of total incoming licenses surrendered

Oregon Economist

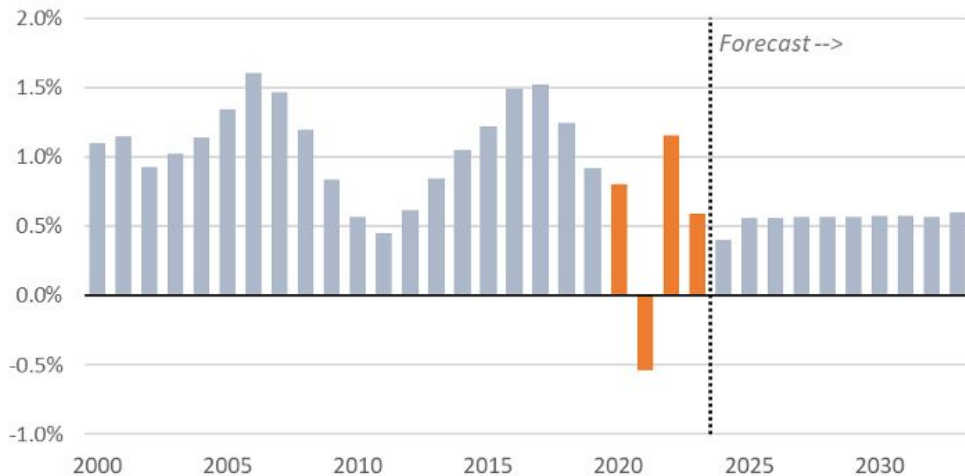


Population growth slowly returns

Oregon Population Growth

Annual change in total state population

History/Forecast and PSU Estimates



Oregon is growing slower than the U.S

- Total growth slower in part due to deaths outnumbering birth
- As the number of deaths exceeds the number of births, Oregon's entire population growth will come from net migration
- Migration has historically been pro-cyclical

Forecast - reflects PSU's estimates

- Update expected in April 2025
- Population expected to grow by average of 0.6% through 2033.

Oregon Economist

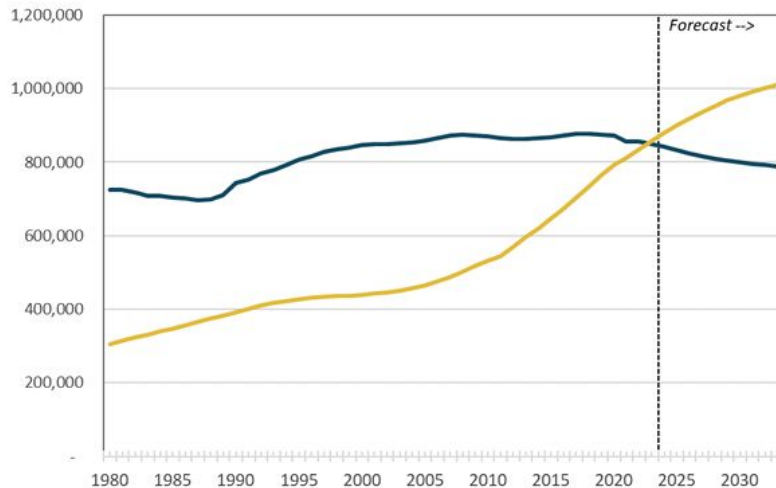


Demographic shift ahead



Oregon Demographic Shift

School-age and 65+ Population



Source: Oregon Office of Economic Analysis
Note: School-age refers to the population 0-17 years

- In 1980, the number of children were over twice the number of people 65yrs +.
- Now, the number of people 65+ outnumber the number of children. This is due to:
 - A continuing low birth rate
 - baby-boomers maturing to older age group
 - improving life expectancy

General Fund

Forecasting The Future

Increases From Last to Current Year



Decision-Based Increases

● Nutrition Services Transfer	Free meals across district	\$ 900,000
● ESSER Staffing moved to GF	Continuing 17 FTEs	\$ 2,000,000
● New Staffing	Added 57 FTEs	\$ 7,500,000
● Curriculum Transfer	Increased transfer	\$ 1,000,000
● General M&S increases	General M&S increase	\$ 2,200,000

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Cost-Based Increases

● Compensation (COLA/Steps)		\$ 7,500,000
● Utilities		\$ 700,000
● Unemployment & PLO		\$ 750,000
● PACE Insurance		\$ 1,600,000

Total

\$24,150,000

General Fund FY25 Continued Staffing



<u>ESSER Continued Staffing</u>	<u>Amount</u>
Student Success Coordinators at High Schools (4 FTE)	475,000
District Interpreter (1 FTE)	80,000
Technology Support Specialists (5 FTE)	925,000
Campus Monitors (2 FTE)	120,000
SSD Staffing - Multiple positions (5 FTE)	400,000
17 FTE Positions	\$2,000,000

General Fund FY25 Staffing Increases



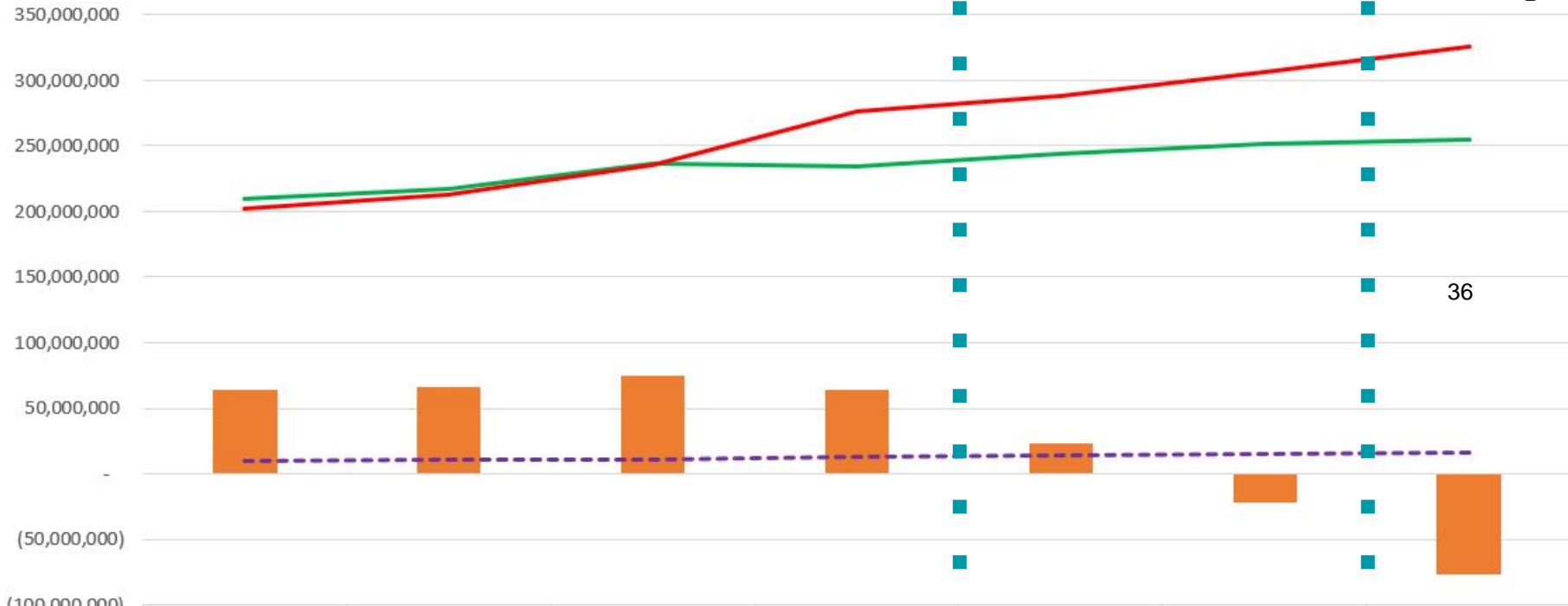
<u>New Staffing</u>	<u>Amount</u>
Middle School Schedule (19 FTE)	2,520,000
Librarians (8 FTE)	1,050,000
Student Success Coordinators (4 FTE)	525,000
Assistant Principals at Large Elementary Schools (3 FTE)	625,000
Custodians (6 FTE)	510,000
Other Staffing (17 FTE)	2,240,000
57 Total Positions	\$7,500,000

Forecast Assumptions



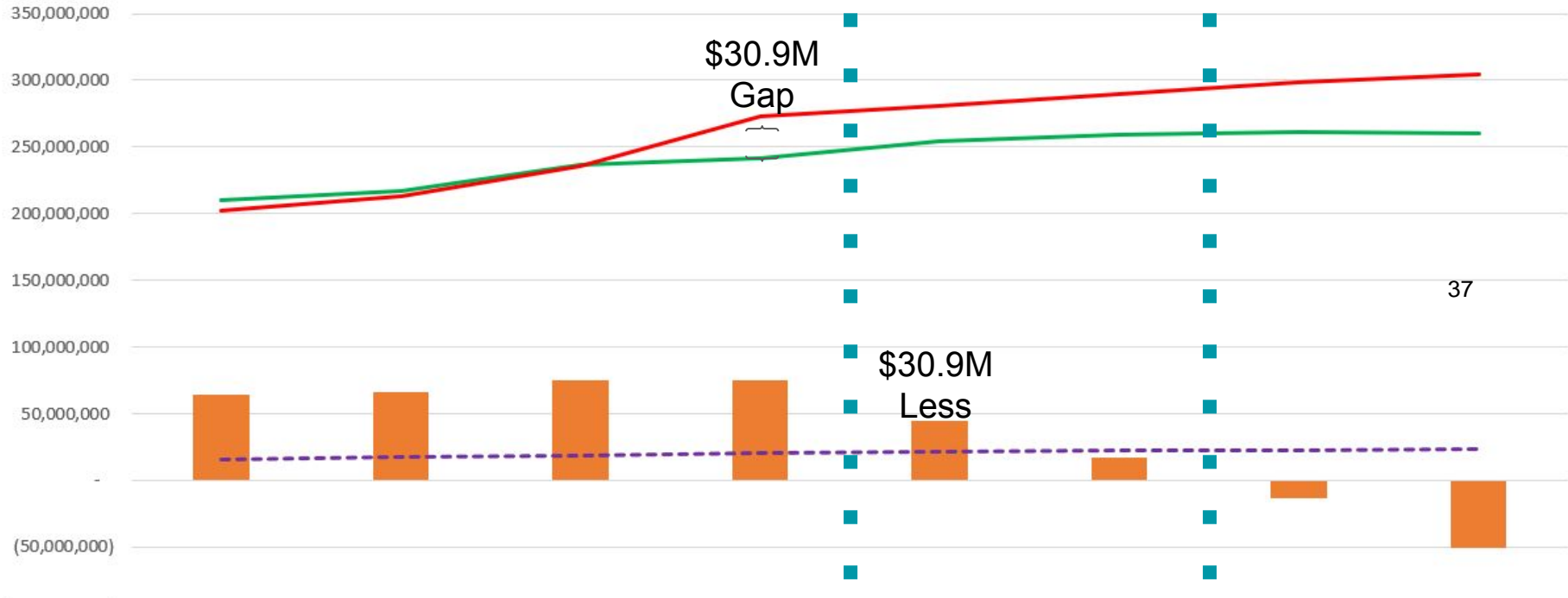
- PERS +24% Increase in PERS cost
- Enrollment -1.78% Decrease each year
- State School Fund +8.98% Assumption \$11.3B Gov. Budget 2025-2027
- State School Fund +4.00% Assumption for 2027-2029 Biennium
- Employee COLA Based on current CBAs
- Reserve Policy 8.00% Reserve Policy
- Transfers Out Facilities, Nutrition, and Curriculum

General Fund - May 2024 Forecast



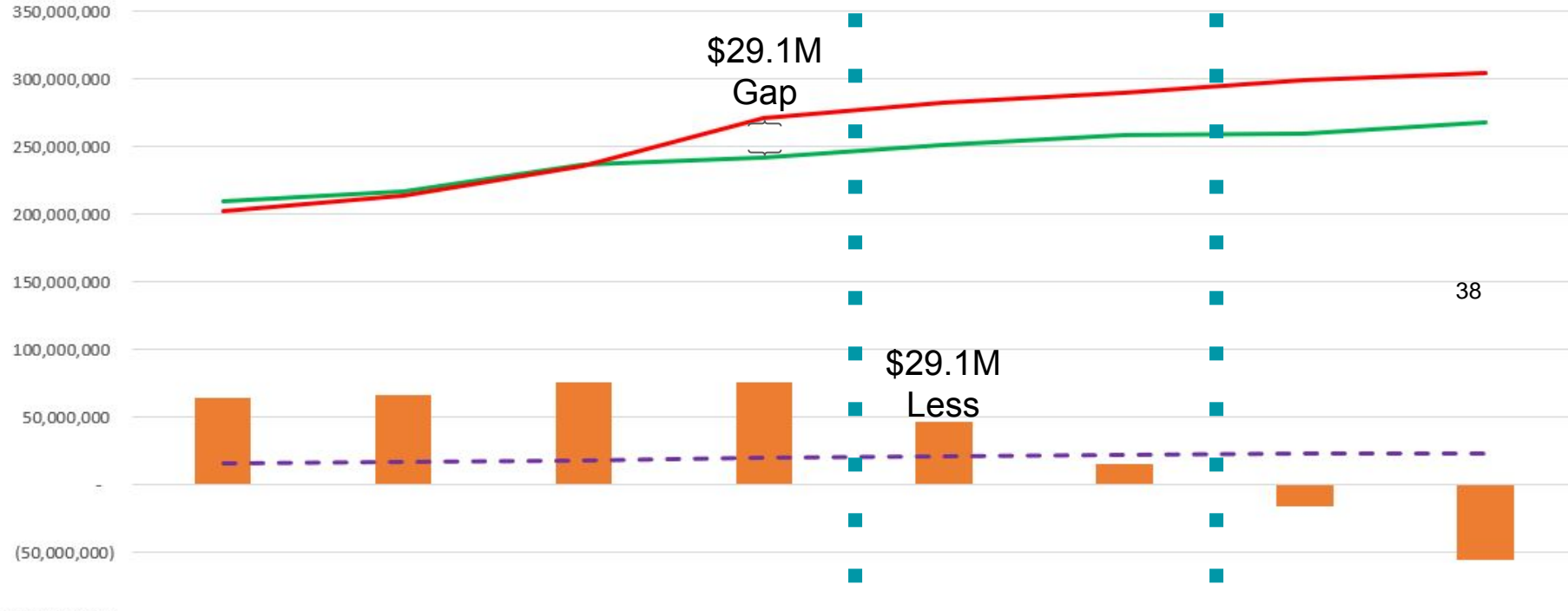
	21/22 Actual	22/23 Actual	23/24 Actual	24/25 Budget	25/26 Forecast	26/27 Forecast	27/28 Forecast
Beginning Balance	64,457,721	66,353,437	75,217,020	64,000,000	22,706,647	(21,853,152)	(76,598,427)
Actual Revenue	209,794,000	217,131,000	236,666,000	234,857,000	243,943,910	251,823,777	254,916,653
Total Expenditures	202,054,000	213,324,000	235,215,000	276,150,353	288,503,709	306,569,052	325,845,721
Reserve Policy 5%	9,826,050	10,666,200	11,322,050	12,932,668	14,425,185	15,328,453	16,292,286

General Fund - Jan 2025 Forecast



	21/22 Actual	22/23 Actual	23/24 Actual	24/25 Forecast	25/26 Forecast	26/27 Forecast	27/28 Forecast	28/29 Forecast
Beginning Balance	64,457,721	66,353,437	75,217,020	75,200,000	44,219,000	16,975,000	(13,335,000)	(51,152,500)
Actual Revenue	209,794,000	217,131,000	236,666,000	241,793,000	253,812,000	259,350,000	260,789,000	260,287,000
Total Expenditures	202,054,000	213,324,000	235,215,000	272,774,000	281,056,000	289,660,000	298,606,500	304,464,751
Reserve Policy 8%	15,721,680	17,065,920	18,115,280	20,430,480	21,244,480	21,906,800	22,593,920	23,031,120

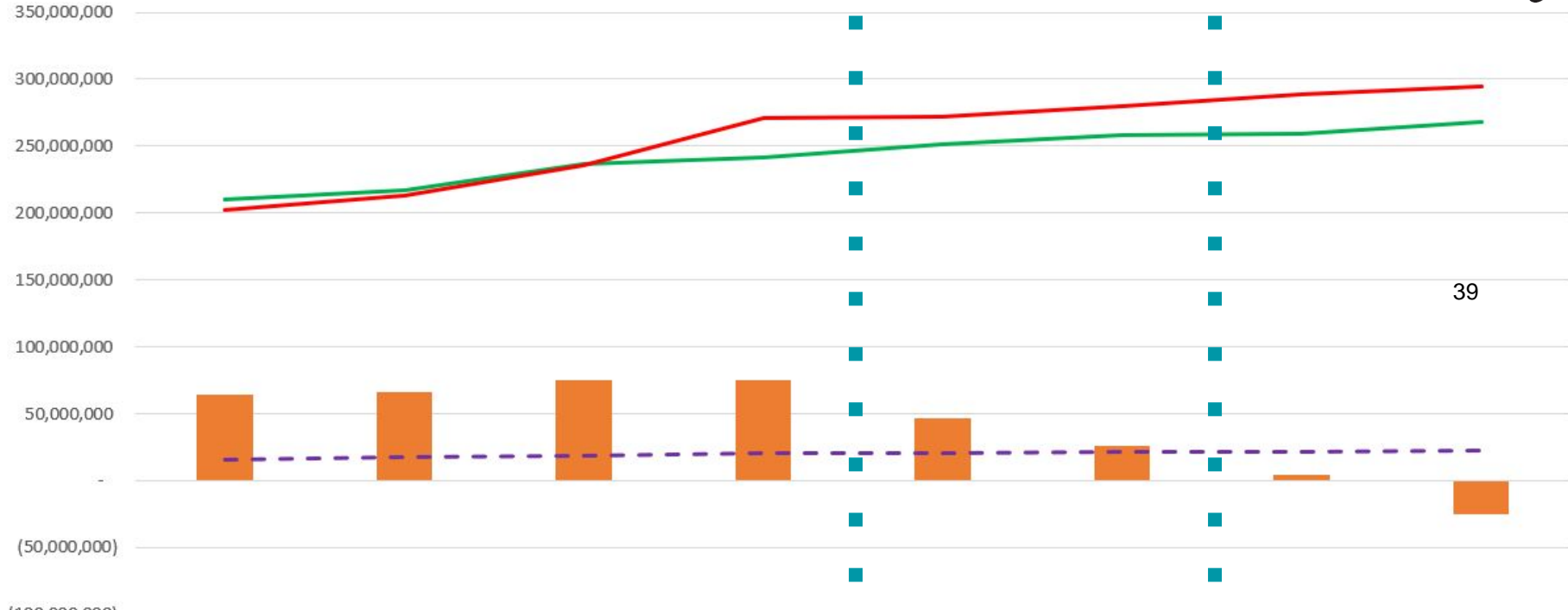
General Fund - Feb 2025 Forecast



	21/22 Actual	22/23 Actual	23/24 Actual	24/25 Forecast	25/26 Forecast	26/27 Forecast	27/28 Forecast	28/29 Forecast
Beginning Balance	64,457,721	66,353,437	75,217,020	75,409,000	46,307,000	15,477,000	(16,281,000)	(55,722,000)
Actual Revenue	209,794,000	217,131,000	236,666,000	241,699,000	251,424,000	258,404,000	259,457,000	267,803,000
Total Expenditures	202,054,000	213,324,000	235,215,000	270,801,000	282,254,000	290,162,000	298,898,000	304,624,000
Reserve Policy 8%	15,721,680	17,065,920	18,115,280	20,272,640	21,243,200	21,894,160	22,569,440	23,001,760

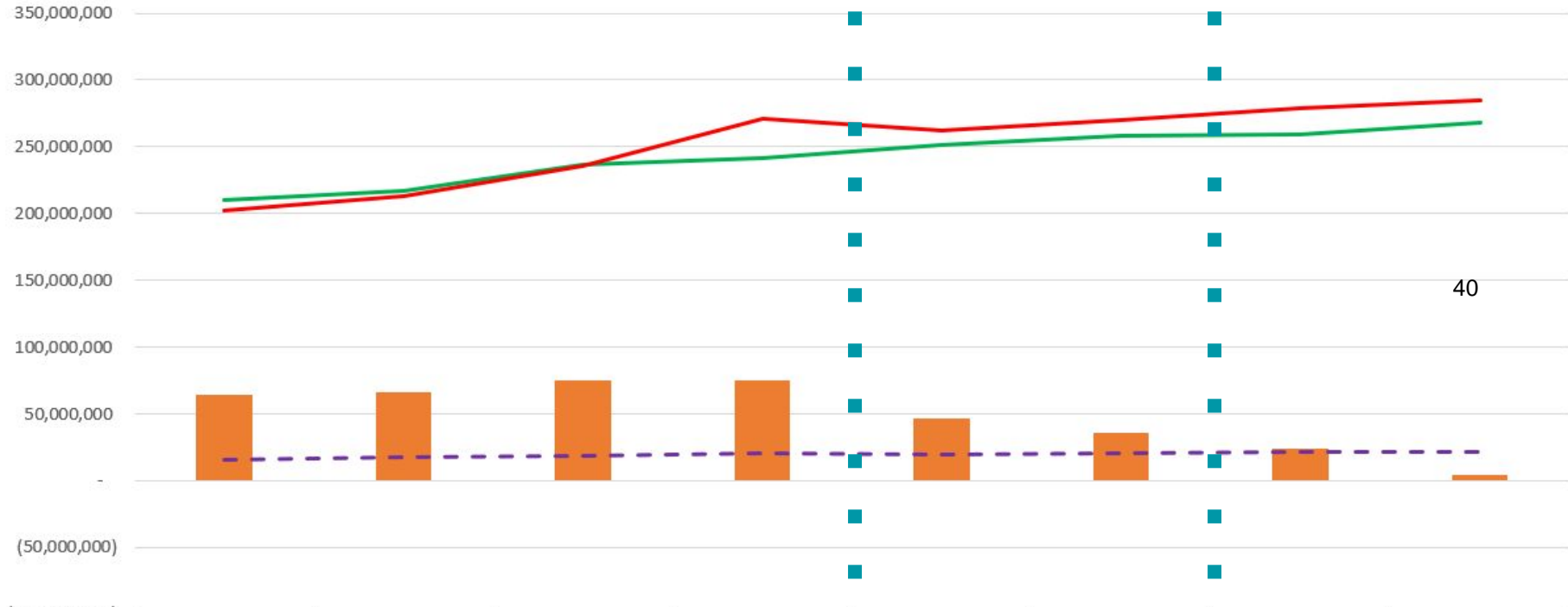
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\$10M in General Fund Reductions



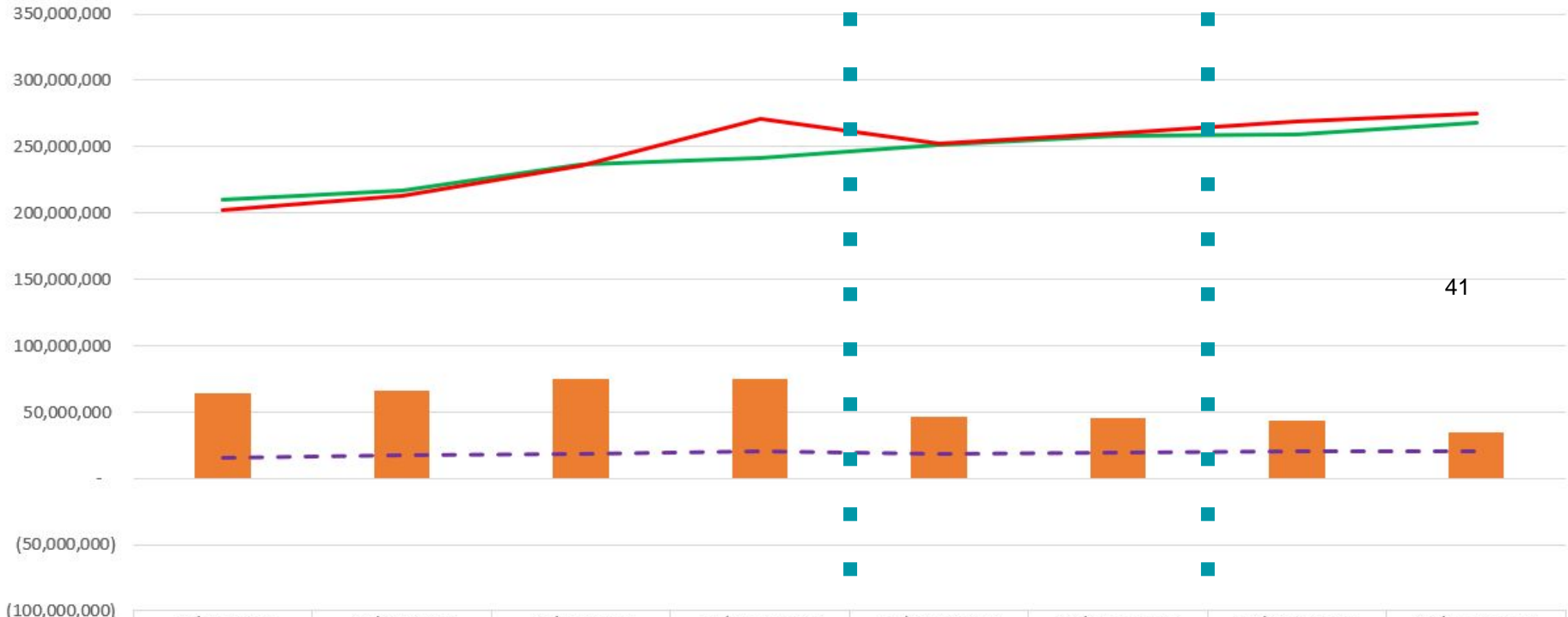
	21/22 Actual	22/23 Actual	23/24 Actual	24/25 Forecast	25/26 Forecast	26/27 Forecast	27/28 Forecast	28/29 Forecast
Beginning Balance	64,457,721	66,353,437	75,217,020	75,409,000	46,307,000	25,477,000	3,719,000	(25,722,000)
Actual Revenue	209,794,000	217,131,000	236,666,000	241,699,000	251,424,000	258,404,000	259,457,000	267,803,000
Total Expenditures	202,054,000	213,324,000	235,215,000	270,801,000	272,254,000	280,162,000	288,898,000	294,624,000
Reserve Policy 8%	15,721,680	17,065,920	18,115,280	20,272,640	20,443,200	21,094,160	21,769,440	22,201,760

\$20M in General Fund Reductions



	21/22 Actual	22/23 Actual	23/24 Actual	24/25 Forecast	25/26 Forecast	26/27 Forecast	27/28 Forecast	28/29 Forecast
Beginning Balance	64,457,721	66,353,437	75,217,020	75,409,000	46,307,000	35,477,000	23,719,000	4,278,000
Actual Revenue	209,794,000	217,131,000	236,666,000	241,699,000	251,424,000	258,404,000	259,457,000	267,803,000
Total Expenditures	202,054,000	213,324,000	235,215,000	270,801,000	262,254,000	270,162,000	278,898,000	284,624,000
Reserve Policy 8%	15,721,680	17,065,920	18,115,280	20,272,640	19,643,200	20,294,160	20,969,440	21,401,760

\$30M in General Fund Reductions



	21/22 Actual	22/23 Actual	23/24 Actual	24/25 Forecast	25/26 Forecast	26/27 Forecast	27/28 Forecast	28/29 Forecast
Beginning Balance	64,457,721	66,353,437	75,217,020	75,409,000	46,307,000	45,477,000	43,719,000	34,278,000
Actual Revenue	209,794,000	217,131,000	236,666,000	241,699,000	251,424,000	258,404,000	259,457,000	267,803,000
Total Expenditures	202,054,000	213,324,000	235,215,000	270,801,000	252,254,000	260,162,000	268,898,000	274,624,000
Reserve Policy 8%	15,721,680	17,065,920	18,115,280	20,272,640	18,843,200	19,494,160	20,169,440	20,601,760

What does it all Mean



	<u>\$10M Reductions</u>	<u>\$20M Reductions</u>	<u>\$30M Reductions</u>
Licensed Staff, or	80 FTE	160 FTE	240 FTE
Classified Staff, or	117 FTE	234 FTE	351 FTE
MAPS/Admin, or	68 FTE	136 FTE	Not Enough
Materials & Services, or	37%	74%	Not Enough
Transfers, or	57%	Not Enough	Not Enough
School Days (furloughs)	7	14	21

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★ It costs \$1.45 million per day just for staffing.

What does it all mean



<u>Reductions in 2026-27</u>	<u>Beginning 2025-26</u>	<u>Beginning 2026-27</u>	<u>Beginning 2027-28</u>	<u>Beginning 2028-29</u>
No Reductions	\$46M	\$15M	-\$16M	-\$55M
\$10M Cuts	\$46M	\$25M	\$3M	-\$25M
\$15M Cuts	\$46M	\$30M	\$13M	\$10M
\$20M Cuts	\$46M	\$35M	\$23M	\$4M
\$25M Cuts	\$46M	\$40M	\$33M	\$19M
\$30M Cuts	\$46M	\$45M	\$43M	\$34M

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★ This assumes all reductions made in 25/26 then status quo into the future

Looking Ahead



Upcoming Challenges

- What does it mean to “right size the ship”?
- Known and unknown upcoming increases...
 - PERS, COLA, and Insurance
 - Future bargaining with EEA & OSEA and determinations with MAPS
 - Legislation mandates
 - Federal funding changes
 - Lower enrollment

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How do we balance 4J goals & values with lower enrollment and resources?

General Fund

FY26 Budget

A Note on Federal Funds



- ESEA - Title IA, IC, ID, IIA, III, IV, VI
- McKinney Vento
- IDEA
- BEST
- Family Resource Center
- Teacher Pathways
- Youth Transition Program (YTP)
- Perkins/CTE
- Safe Routes to School
- Fresh Fruit and Vegetable Program
- Farm to School
- School Breakfast, Lunch Supper
- Early Learning
- [Protecting Children From Chemical And Surgical Mutilation](#)
- [Expanding Educational Freedom and Opportunity for Families](#)
- [Ending Radical Indoctrination in K-12 Schooling](#) ⁴⁶
- [Additional Measures to Combat Anti-Semitism](#)
- [Keeping Men Out of Women's Sports](#)
- [Tariffs and Duties](#)
- [Access to Database of Immigrant Minors](#)
- [Dear Colleague Letter](#)

Why Are We Here?



There are a number of factors that contribute to the budget shortfall:

- **Declining enrollment** - 4J is getting smaller. Declining birth rates mean smaller kindergarten classes are entering the district while bigger senior classes exit. Schools are funded based on the number of students they serve, fewer students means less funding from the state. 47
- **Increasing Staffing** - While enrollment has been falling, staffing has increased by 37 percent over the last 4 years.
- **PERS costs are increasing** - retirement costs are increasing by 24%.
- **Loss of federal COVID relief funds** - ESSER funds came to an end on September 30, 2024. Federal funds were used to provide needed mental and behavioral health supports, counseling, and summer learning programs.

Are Other Districts Experiencing Reductions?



- Many districts in Oregon have shared that they will be reducing spending next year.
- Across the state districts are making budget reductions for the same reasons (PERS increases, declining enrollment).
- Last year many more made significant cuts due to the loss of federal COVID-Relief funds.
- Thankfully, the 4J has maintained a strong ending fund balance that will create a cushion and reduce the impact of needed spending cuts. However, this year alone 4J spent approximately \$30 million more than it received in revenue from the state. The reserves will not last long at that rate of spending.

Recognition



- The last significant reductions in 4J came during the Great Recession of 2008 (about 15 years ago).
- Goals:
 - Clarity and transparency
 - Empathy and compassion
 - Grace and space for feelings and emotion
 - Recognize impacts and challenges: All reductions lessen our ability to produce the best outcomes and experiences for students and staff, but recommendations should protect priorities
- Tracking, learning, correcting...



“Thank you so much for taking the time to communicate this information while trying to make this matter less stressful. I’ve been with the district for over 15 years with stellar attendance, skills and flexibility, I am now wondering what’s going to happen to me, my family and my livelihood. I wanna keep my hopes high⁵⁰ but please understand that our morale is at ground level. I am optimistic about what’s about to come, but can’t say that I am also scared.”

Margaret Jacqueline Solares

Bilingual Educational Assistant-Pre-K | Asistente Bilingüe de Educación-Pre-K

Revenue Variables



- Local:
 - Student enrollment
- State:
 - Governor Kotek's State School Fund (SSF) target: \$11.36 Billion
 - SB 819 reducing the PERS rate by approximately 1.68 percentage points.
 - Funding a proposal to lift the cap on students with disabilities in the SSF and increase the funds for high cost disabilities by \$200 million
- Federal:
 - Administration changes to funds or access to funds
 - Health of the economy

No Single Answer...

Barring an economic downturn, loss of federal funding, or extreme enrollment decline...



- The District does not need to make any reductions to operate at the same level of services next school year.
 - It would drop below the 8% reserve level (by about \$5 million)
 - It would need to make more significant reductions for the 2026-27 budget
- The District could make significant reductions this year and not need⁵² to make reductions for the next several years
 - A \$30 million reduction now, would keep the district well over the 8% reserve level for two biennia (4 years)
- The District could make a series of small adjustments (\$5-10 million) over the next 4-8 years.
- The District could make a moderate adjustment now and review again for the 2027-29 biennium - based on Legislative allocations.

What does it all mean



<u>Reductions in 2026-27</u>	<u>Beginning 2025-26</u>	<u>Beginning 2026-27</u>	<u>Beginning 2027-28</u>	<u>Beginning 2028-29</u>
No Reductions	\$46M	\$15M	-\$16M	-\$55M
\$10M Cuts	\$46M	\$25M	\$3M	-\$25M
\$15M Cuts	\$46M	\$30M	\$13M	\$10M
\$20M Cuts	\$46M	\$35M	\$23M	\$4M
\$25M Cuts	\$46M	\$40M	\$33M	\$19M
\$30M Cuts	\$46M	\$45M	\$43M	\$34M

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★ This assumes all reductions made in 25/26 then status quo into the future

Budget Values Framework



The School Board and Budget Committee will base budget decisions on a framework based on Board goals and the district's equity lens.

GOAL # 1: Increasing equitable outcomes and achievements

- Equity: Making it so that a student's demographic characteristics and where a student begins life doesn't negatively determine or limit that student's success in school/life.
- Public Education plays an important role in setting each student up for success in their life. Accordingly, our district must allocate efforts and resources in ways that support equitable student access and opportunity. Our district will take a proactive approach, rather than waiting for complaints or failure, including with literacy, SPED (special education), and racial harassment issues.

GOAL # 2: Safety and Well Being of Students and Staff

- We will cultivate the safety, belonging and wellness of our students and staff in our schools.

GOAL # 3: Proactively engaging our community

- The quality of communication and engagement with our district is integral to the success of our shared work, and in order to maximize success, we will improve our communication and engagement.

Budget Values Framework



Value	Funding Priority	Maintenance Funding	Value-Related Activities Funded in 2024-25
Increasing equitable outcomes and achievements	<ul style="list-style-type: none"> Inclusion model, including improving and implementing timely, proactive identification and relationship-based support of disabled students. Ensure that the inclusion model prioritizes input from those with lived experience. Literacy efforts – implementation and improvement Bullying and harassment prevention and response Professional development and training for staff to support these efforts 	<ul style="list-style-type: none"> Classroom materials that are inclusive and representative DEI efforts and leadership Affinity groups District Equity Committee Equity Lens and Equity Budgeting 	<ul style="list-style-type: none"> Curriculum/Program Adoption Federal Programs (Title I, II, III, IV, VI, IDEA) NATIVES Program Equity Managers Welcome Center Early Learning 504 Support Principal academy AVID MTSS 55 Data Research & Planning McKinney Vento & 15th Night Programming English Language Development Grow Your Own Program Free Meals for All Restorative and transformational justice efforts - Student Support Matrix
Safety and Well Being of Students and Staff	<ul style="list-style-type: none"> Exit data for staff with information compiled and reviewed on a regular basis Safe and effective report structure for staff, students and families for complaints or issues Safety planning with feedback from the community, including extreme incident planning 	<ul style="list-style-type: none"> School Based Health Centers Mental and Behavioral Health support and efforts A focus on being fully staffed Access by all employees to options for quality professional development 	<ul style="list-style-type: none"> Title IX and Civil Rights Safe Routes to School Risk Management Behavioral threat assessment Restorative and transformational justice efforts - Student Support Matrix Resolution 2024-10 Reaffirming Commitment to a Safe, Inclusive and Supportive School Environment for Each Student, Welcoming Students of All National Origins, Without Immigration or Documentation Status Barriers School safety and emergency management

Budget Values Framework



Value	Funding Priority	Maintenance Funding	Value-Related Activities Funded in 2024-25
Proactively engaging our community	<ul style="list-style-type: none"> • District Website – make it accessible with timely, meaningful content • Create community engagement events that are well attended in each region, including among historically disadvantaged groups • Consider alternative forms of communication (not just newsletters or written content) 	<ul style="list-style-type: none"> • Useful newsletters • Ombudsperson • Podcast 	<ul style="list-style-type: none"> • EEF Support • Athletics
Maintaining District Functions			<ul style="list-style-type: none"> • Nutrition Services <ul style="list-style-type: none"> ◦ Catering • Transportation Services • Technology Services <ul style="list-style-type: none"> ◦ Network improvements ◦ Phone and website upgrades • Finance - payroll, accounts payable, budget monitoring, audit support, procurement, grant management • Human Resources - employee benefits, bargaining support, support & supervision • Nursing Services • Custodial Services • Grounds and facility improvements • State & Federal reporting • Warehouse distribution • District Registrar • School Choice Coordinator and System • Bis Team <p style="text-align: right;">56</p>

Budget Values Framework:

Budget Decision Tool



4J Leadership, School Board, and Budget Committee will consider the following questions:

1. If a new investment is presented, is there new revenue to support it?
If not, what will be cut to pay for this investment?
2. If we make adjustments, does it align with the Budget Values Framework?
3. Review programs/services with the 4J Equity Lens:
 - a. What is the goal of the investment, reduction, or budget change?
 - b. Who will be impacted and have they being included in the decision process?
 - c. How might this impact equitable services?
 - d. What outcomes will this accomplish?
 - e. What are the unintended consequences?

Position-by-Position Review



Key Essential Questions for Evaluating Position Reductions

1. Student Impact & Equity Considerations-Goal #1: Increasing Equitable Outcomes and Achievements

Will eliminating this role create a gap in services that directly affect student outcomes? (e.g., literacy, math, special education, multilingual learners, behavioral support)

Does this role support students across multiple schools or just one site? Would a reduction disproportionately impact certain schools more than others?

How does reducing this position affect equity in access to resources, instruction, or specialized programming?

If this position is reduced, how will the district ensure continuity in services for students who rely on this support?

2. Instructional & Curriculum Implementation-Goal #1: Increasing Equitable Outcomes and Achievements

What are the short-term and long-term instructional consequences of eliminating this position?

Is there an active curriculum adoption, professional development initiative, or instructional program tied to this role?

Can the responsibilities of this position be absorbed by existing staff without overburdening teachers and administrators?

Does this position help fulfill compliance requirements (e.g., Title I, state mandates, special education laws)?

3. Budgetary & Grant Considerations-Goal #3: Proactively Engaging Our Community

Is this position fully funded by the district, or does it receive support from grants, ESD funding, or external partnerships?

If a grant funds this position, is that funding expected to continue beyond the current cycle? If not, what are the options for sustainability?

Are there alternative funding sources that could support this position if district funding is reduced?

Are there alternative funding sources that could support this position if district funding is reduced?

If this position is eliminated, what are the actual cost savings, and do they justify the potential impact on students and staff?

Would shifting someone from this position to a classroom role still meet contractual and funding requirements?

4. Organizational Structure & Reallocation-Goal #3: Proactively Engaging Our Community

If this position is eliminated, which department or individual will absorb the responsibilities?

Are there overlapping roles in other departments that can take on these tasks without overburdening staff?

Can this role be consolidated with another position to maintain its function while reducing overall FTE?

Is this position supporting a district-wide need, or would it make more sense to decentralize responsibilities to school-based roles?

If this position is eliminated or reduced, is there a clear transition plan to ensure a smooth shift in responsibilities?

5. Community & Stakeholder Input-Goal #2: Safety and Well-Being of Students and Staff

Have we gathered feedback from school leaders, teachers, and staff who work directly with this position?

Have we communicated potential changes to those who will be impacted? Do we have a plan to support staff morale and the transition process?

Would reducing this role create a perception of decreased investment in a key area? (e.g., STEM, literacy, equity, special education)

6. Legal, Policy, and Contractual Obligations-Goal #1: Increasing Equitable Outcomes and Achievements

Does this position fulfill a legal or policy requirement that we must maintain for compliance?

Are there labor agreements that require certain positions to be maintained or reallocated in specific ways?

If this role is reduced, will it impact staffing ratios, collective bargaining agreements, or workload distribution?

7. Alternative Solutions & Workforce Planning-Goal #2: Safety and Well-Being of Students and Staff

Are there alternative ways to address budget concerns without eliminating or reducing this position? (e.g., restructuring, seeking additional grants, shared services with other districts)

If multiple positions are being reduced, are we ensuring that cuts are balanced and do not disproportionately impact one area? (e.g., instruction, student services, operational support)

Could some of these positions shift to part-time instead of being fully eliminated to maintain continuity while reducing costs?

Are we prioritizing reductions based on direct student impact rather than administrative convenience?

Would a phased reduction or transition make more sense than an immediate elimination?

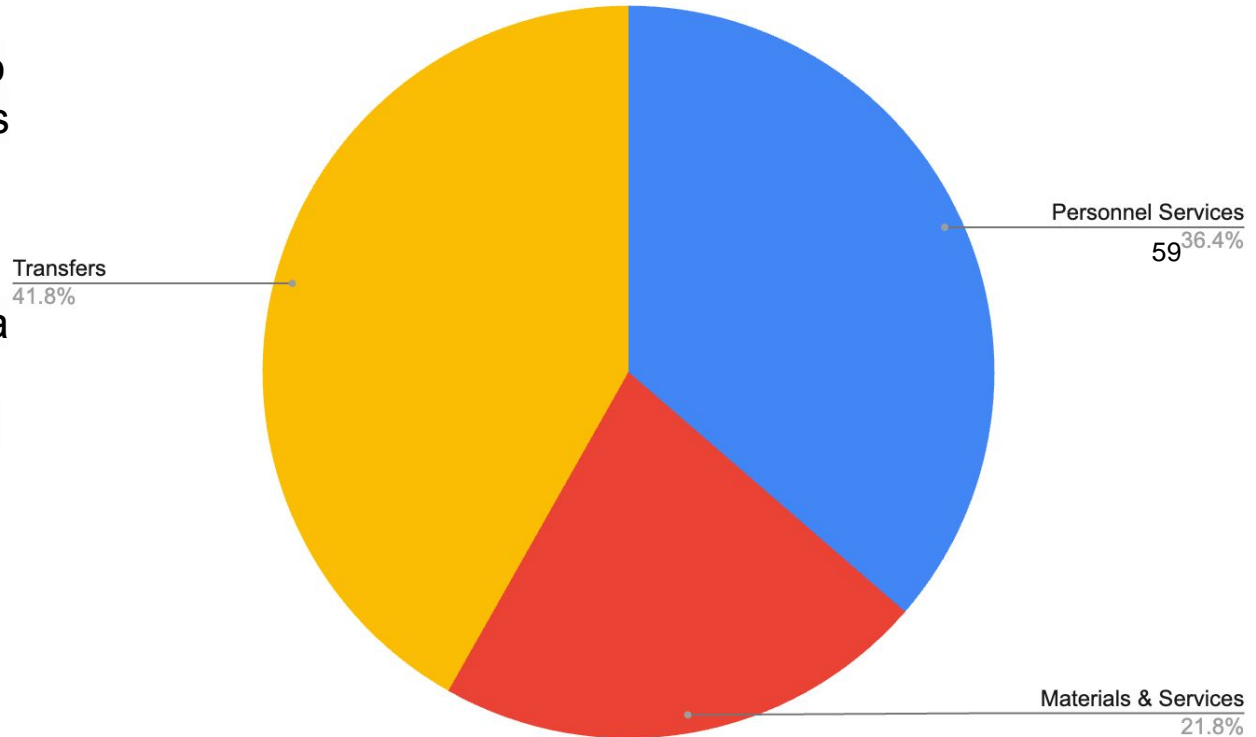
Final Considerations

Before making reductions, these key questions ensure that the team weighs all factors—budget, student impact, equity, organizational capacity, compliance, and alternative solutions. Taking a strategic, data-driven approach will help avoid unintended consequences and ensure that decisions align with district goals and priorities.

More than 60% of Proposed Reductions are Materials & Services - Not Personnel



Our planning is designed to avoid impacts like furloughs and layoffs. The bulk of proposed reductions are in materials and services, limiting staffing impacts to a level that can be absorbed through attrition. This is still really difficult for staff who are displaced, but our aim is to avoid impacts like wage loss through furloughs and job loss.



Student Needs Are Not Stagnant...



Our Budget will grow before we make reductions...

- English Language Development (ELD) - \$470,000
- Increased Lane ESD Life Skills Costs - \$1.1 million
- 4J Operate Tier III Life Skills - \$1 million
- New Elementary Life Skills - \$750,000
- Backfill Loss of Title I Funds - \$250,000
- Extended Day Program Moving to General Fund - \$1.65 million
- **Total - \$5.15 million**

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This means that to reduce our Budget by \$5 million next year, we need to cut about \$10 million.

Proposed Reductions



Reduction Level	Program Area	Budget Values Framework Impact	Amount
\$5 Million*	Elementary Classroom Instruction	Minimal - Enrollment Decline	\$2,565,000
	School Safety	None - Existing Vacancy	\$85,000
	Finance Department	Minimal - Improving Efficiencies	\$250,000
	Student Services Team	None - Existing Vacancies	\$310,000 ⁶¹
	Communications Team	Minimal - Vacancy + Contract	\$255,000
	Instruction & Access Department	Minimal - Work Redistributed	\$1,340,700
	3% Materials & Services Reduction	Minimal	\$850,000
	Superintendent's Contingency	Minimal	\$1,000,000
	High School Classroom Instruction	Minimal - Enrollment Decline	\$810,000
	Facilities Department	None - Bond Work Continues	\$2,500,000

Proposed Reductions



Reduction Level	Program Area	Budget Values Framework Impact	Amount
\$10 Million	Facilities Department	None - Bond Work Continues	\$2,500,000 ₆₂
	Superintendent's Contingency	Minimal	\$500,000
	Middle School Classroom Instruction	Minimal - Enrollment Decline	\$405,000
	Instruction & Access Department	Moderate - Work Redistributed / Adoption Delays	\$1,675,000

Proposed Reductions



Reduction Level	Program Area	Budget Values Framework Impact	Amount
\$15 Million	Facilities Department	None - Bond Work Continues	\$3,000,000
	Nutrition Department	Minimal - Work Redistributed	\$405,000
	Instruction & Access Department (Includes Library Services)	Substantial - Work Redistributed	\$1,890,000

Proposed Reductions



Reduction Level	Program Area	Budget Values Framework Impact	Amount
\$20 Million	Facilities Department	None - Bond Work Continues	\$1,000,000
	Instruction & Access Department	Moderate - Location Displacement + Art Services	\$277,000
	Communications Team	Moderate - Work Redistributed + Engagement and Student Safety Changes	\$230,000 ⁶⁴
	HR Department	None - Eliminates Access to Past Staff Satisfaction Data	\$135,000
	Student Services Team	None - Unused Materials Budget	\$65,000
	Classified Instructional Staff (non-SpEd)	Significant - Equitable Outcomes + Safety/Wellbeing	\$382,500
	Nutrition Services	Moderate - Family Impacts	\$2,800,000

Proposed Reductions

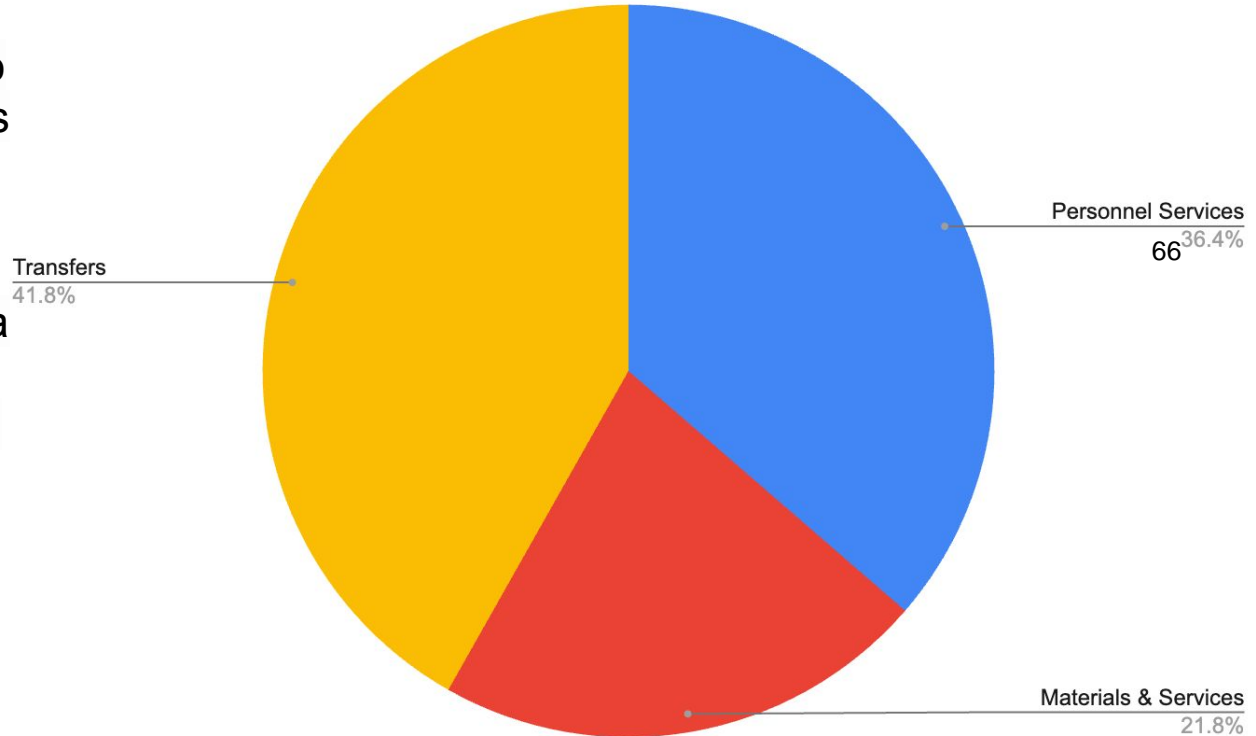


Reduction Level	Program Area	Budget Values Framework Impact	Amount
\$25 Million	Classified Instructional Staff (non-SpEd)	Significant - Equitable Outcomes + Safety/Wellbeing	\$85,000 ⁶⁵
	Elementary Behavior Support	High - Student Safety & Wellbeing	\$1,275,000
	Facilities Department	None - Bond Work Continues (Available one-time only)	\$2,700,000
	Consolidate/Close Elementary Schools	Moderate - Family Impacts	\$900,000

More than 60% of Proposed Reductions are Materials & Services - Not Personnel



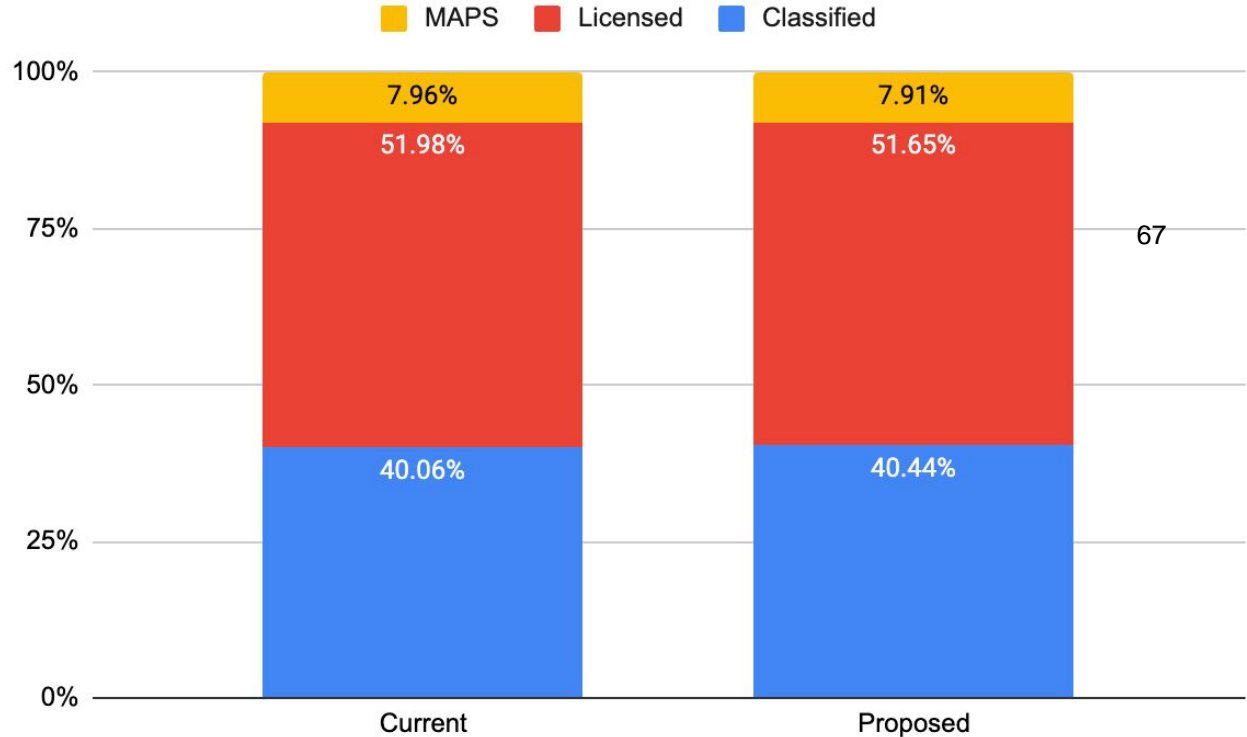
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Proposed Personnel Reductions Across Employee Groups



Percent Reduction to Employee Group	
Employee Group	% of Workforce
MAPS	4%
Licensed	4%
Classified	2.5%



Proposed Budget



- The Proposed Budget we will include about \$17 million in reductions.
 - It will not include any reductions on the \$25 million slide and it will not include nutrition services reductions on the \$20 million slide.
 - We continue to study and understand impacts, other adjustments may be made to the list of reductions this evening when you receive the proposed budget
- The Budget Committee may discuss and advise on other options during the regular meetings in April:
 - No reductions
 - Fewer reductions
 - Moderate adjustment now and review again for the 2027-29 biennium
 - Plan for a series of small adjustments over the next several years
 - More significant reductions to stave-off future reductions

The 4J Way

This is a difficult time, but we can help the District systems live in to what we see demonstrated by District staff every day.



We are student-centered.

We think about the greater good with the intention of making our district better for each and every student.

We move toward hope and resolution.

We enter space with care and curiosity, and we surround one another with love.

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We are weathermakers.

We don't accept the storm, the doom, or the gloom. We put our best vision of ourselves, our colleagues, and our system forward.

We hold high expectations.

We support and challenge each other to make our district the best it can be—for our students, colleagues, and communities.

Cautions...



Eugene School District 4J is a large and complex organization:

- 3rd largest employer in Lane County
- \$600 million+ annual budget
- More than 2,000 employees +

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To accomplish our work and avoid unintentional impacts we need to operate at an elevated level:

- We are expanding public and employee group comment times to hear a wider variety of input
- All reductions impact students and staff
- Directing on values will be more effective than a focus on individual line items

Questions...



- If there is time, we can respond to some questions.
- We will also collect written or emailed questions and share responses with the entire committee prior to ⁷¹ the next meeting.
 - brown_mat@4j.lane.edu

Next Steps...



3/11 - Tues - Informational Meeting

4/04 - Fri - Proposed Budget Finalized and sent out to committee members

4/15 - Tues - Budget Committee Meeting 1

(Areas: Private Trust, Insurance Reserves, Debt Service, Capital)

4/22 - Tues - Budget Committee Meeting 2

(Areas: Special Purpose and General Fund Revenue)

4/29 - Tues - Budget Committee Meeting 3

(Areas: General Fund Expenses & Budget Approval)

5/07 - School Board Public Hearing

5/21 - School Board Adoption