

AGENDA
Southern Oregon Education Service District
BOARD OF DIRECTORS REGULAR MEETING



6:00 PM – Wednesday, October 19, 2022
SOESD Administration Office
101 North Grape Street, Medford OR 97501

- 1. Preliminary**
 - A. Call to Order
 - B. Land Acknowledgement
 - C. Pledge of Allegiance
 - D. Comments from Representatives of the Associations
 - E. Recognition of guests
 - F. **Requests to Address Agenda Items
- 2. Consent Agenda**
 - A. Approval of Agenda
 - B. Approval of Minutes
 - C. Personnel Report
 - D. Financial Report
- 3. Communications**

SOESD Superintendent’s Schedule of Meetings –October, November, and December 2022
- 4. Administration**
 - A. First Reading of SOESD Board Policies
 - B. SOESD Phoenix Campus Update
 - C. Strategic Planning
 - D. Board Training Requirements
- 5. Business Affairs**

2023-2024 SOESD Budget Year Calendar
- 6. Executive Session**

ORS 192.660.(2)(d) – Labor Negotiations
- 7. Open Session**
- 8. Miscellaneous**
 - A. Next Regular Meeting: November 16, 2022, 6:00 PM, SOESD Administration Office, Medford
 - B. OSBA Legislative Roadshow: Oct 24, 2022, 6:00 PM Dinner, 6:30 PM Business Meeting Rogue Regency Inn, Medford
 - C. OAESD Superintendent and Board Summit, November 10, 2022, Portland Marriott Downtown Waterfront Hotel
 - D. 2022 OSBA Annual Convention: Pre-conference November 10, 2022; Main Conference November 11-13, 2022, Portland Marriott Downtown Waterfront Hotel
- 9. Adjournment**

*Members of the community will have opportunity to provide public comment regarding a specific agenda topic during the preliminary portion of the meeting. If you wish to speak to a specific agenda item, complete the request form provided at this link by 12:00 noon on Wednesday, October 19, 2022: <https://forms.gle/p2cp3DRAVjyWLT8>

TO ATTEND VIRTUALLY:
Join by computer: <https://soesd.zoom.us/j/97762491735>
Join by phone: +1 669 900 6833
Meeting ID: 977 6249 1735

The meeting location is accessible to persons with disabilities. In accordance with the ADA, requests for accommodations should be made at least 48 hours before the meeting to: Jessica Bach, Southern Oregon ESD, 101 North Grape Street, Medford OR 97501
Phone: 541-776-8590 ext 1116
Email: jessica_bach@soesd.k12.or.us

Southern Oregon Education Service District
Board of Directors Regular Meeting
6:00 PM – Wednesday, October 19, 2022
SOESD Administration Office
101 North Grape Street
Medford OR 97501

1. Preliminary

- A. Call to Order
- B. Land Acknowledgement
- C. Pledge of Allegiance
- D. Comments from Representatives of the Associations
- E. Recognition of Guests
- F. Requests to Address Agenda Items

2. Consent Agenda

- A. Approval of Agenda
- B. Approval of Minutes:
 - Special Meeting (Work Session), September 21, 2022 ([Page 4](#))
 - Regular Meeting, September 21, 2022 ([Pages 5-9](#))
- C. Personnel Report
 - Administration recommends the offer of an employment contract for the 2022-2023 academic year to Susan Hermes, Occupational Therapist.
- D. Financial Report
The financial report for the period ending September 30, 2022 is included for your review. ([Pages 10-16](#))

Proposed Action: Move to approve all items on the consent agenda.

3. Communications

SOESD Superintendent’s Schedule of Meetings – October, November, and December 2022
Superintendent Beveridge’s three-month schedule of meetings is included for your review.
([Pages 17-19](#))

4. Administration

- A. First Reading of SOESD Board Policies
The policies listed below will be reviewed by the Board during the work session preceding the regular meeting. They are provided as a separate email attachment and presented for first reading.
 - DDB..... Native American Impact Aid Funds
 - DDC..... Native American Education Program Grants
 - DH..... Bonded Employees and Officers
 - DI..... Fiscal Accounting and Reporting
 - DIE..... Audits
 - DJ..... ESD Purchasing
 - DJC..... Bidding Requirements
- B. Phoenix Campus Update
Superintendent Beveridge and CFO Weaver will provide an update on progress toward rebuilding the SOESD Phoenix Campus that was destroyed in the Almeda Fire on September 8, 2020. The End of Month Report for September 2022 from HMK is included as a separate email attachment.

- C. Strategic Planning
Superintendent Beveridge will provide background on the development of SOESD’s next strategic plan.
- D. Board Training Requirements
Senate Bill 379 requires “training each year on the prevention and identification of child abuse.” Public School Works Course #M-234 – “Recognizing and Responding to Child Neglect and Abuse in Oregon” was designed for school districts and ESDs to meet the training requirement of SB379. The course provides information on understanding child abuse, types of child abuse, tips for educators, and reporting child abuse. SOESD board members will receive an email message from the HR office in a few days with instructions for taking the online course.

5. Business Affairs

2023-2024 SOESD Budget Year Calendar

CFO Weaver will present the proposed 2023-2024 budget year calendar and provide an overview of the time line. ([Pages 20-21](#))

PROPOSED ACTION: Move to approve the SOESD Budget Calendar for Budget Year 2023-2024.

6. Executive Session ORS 192.660(2)(d) – Labor Negotiations

The board will meet in executive session, pursuant to ORS 192.660(2)(d), to conduct deliberations with persons designated by the governing body to carry on labor negotiations.

7. Open Session

8. Miscellaneous

- A. Next Regular Meeting: November 16, 2022, 6:00 PM
- B. OSBA Legislative Roadshow: Oct 24, 2022, 6:00 PM Dinner, 6:30 PM Business Meeting
Rogue Regency Inn, Medford. *Please RSVP to the board secretary if you plan to attend.*
- C. OAESD Superintendent and Board Summit, November 10, 2022, Portland Marriott
Downtown Waterfront Hotel
Superintendent Beveridge and Member Middleton plan to attend the OAESD Summit.
- D. 2022 OSBA Annual Convention: Preconference, November 10, 2022; Main Conference
November 11-13, 2022, Portland Marriott Downtown Waterfront Hotel
Superintendent Beveridge, Member Middleton, Member Valtierra-Sanchez, and Member Wright plan to attend. Please let the board secretary know as soon as possible if you would like to attend so that lodging reservations and conference registration can be made for you.

9. Adjournment

Minutes in Brief SOUTHERN OREGON EDUCATION SERVICE DISTRICT
BOARD OF DIRECTORS SPECIAL MEETING
WEDNESDAY, SEPTEMBER 21, 2022

Meeting Cancelled A work session of the Southern Oregon Education Service District Board of Directors was scheduled to be held in the upstairs conference room of the SOESD's administration office and by video/audio conference on Wednesday, September 21, 2022 at 5:00 PM. The work session was cancelled due to lack of a quorum.

Attendance Board members in attendance: Board members absent:
Robert Moore Rosie Converse
Corbin Morell Jessie Hecocta
Annie Valtierra-Sanchez Ana Mannenbach
Mary Middleton
Maud Powell
Justin Wright

SOESD staff members and guests in attendance:
Jessica Bach
Scott Beveridge
Rick Stucky, OSBA Policy Specialist
Daniel Weaver

SOESD Board Policy Rewrite The review of proposed board policies was postponed to a future meeting.

Minutes in Brief SOUTHERN OREGON EDUCATION SERVICE DISTRICT
BOARD OF DIRECTORS REGULAR MEETING
WEDNESDAY, SEPTEMBER 21, 2022

Call to Order A regular meeting of the Southern Oregon Education Service District Board of Directors was held in the upstairs conference room of the SOESD administration office in Medford and by video/audio conference on Wednesday, September 21, 2022. Chair Converse called the meeting to order at 6:02 PM.

Attendance Board members in attendance: Board members absent:
Rosie Converse Jessie Hecocta
Mary Middleton (by video conference) Ana Mannenbach
Robert Moore (by video conference) Maud Powell
Corbin Morell (by video conference)
Annie Valtierra-Sanchez
Justin Wright (by video conference)

SOESD staff members and guests in attendance:
Mark Angle-Hobson Paul Dakopolos
Jessica Bach Patty Michiels
Scott Beveridge Susan Peck
Celine Buczek Dawn Stephens
Karla Clark Dan Weaver

Executive Session At 6:04 PM, Chair Converse announced the Board would meet in executive session pursuant to ORS 192.660(2)(d) to conduct deliberations with persons designated by the governing body to carry on labor negotiations.

Open Session At 7:15 PM, Chair Converse reconvened the board into open session. Chair Converse read an excerpt from the SOESD's Land Acknowledgement and led those attending in the Pledge of Allegiance.

Comments from Representatives of the Association Celine Buczek, representing the licensed association, thanked the Board and District's bargaining team for engagement in the bargaining process. Ms. Buczek commented on the positive impact the compensation increases have had for the licensed association's members. She expressed appreciation and support for the classified employees as they continue their contract negotiations.

No representatives from the classified association were in attendance.

Requests to Address Agenda Items There were no requests to address agenda items.

Consent Agenda The consent agenda consisted of the following items:
A. Approval of Agenda
B. Approval of Minutes:
• Organizational Meeting, July 20, 2022
• Special Meeting, September 1, 2022

C. Personnel Report

D. Financial Report

IT WAS MOVED BY MEMBER VALTIERRA-SANCHEZ, SECONDED BY MEMBER WRIGHT TO:

Amend the agenda by removing item 6.A, the first readings of proposed policies, and adding them to next month’s agenda.

MOTION CARRIED 6-0

IT WAS MOVED BY MEMBER VALTIERRA-SANCHEZ, SECONDED BY MEMBER WRIGHT TO:

Approve all items on the consent agenda as amended.

MOTION CARRIED 6-0

Communication

SOESD Superintendent’s Schedule of Meetings for September, October, and November 2022

Superintendent Beveridge reviewed his calendar for the three-month period, noting that his schedule included continued policy review, contract negotiations, and meetings regarding the SOESD Phoenix Campus Reconstruction. Also highlighted were the following meetings and activities:

- A number of visits have taken place and are scheduled in the future for Superintendent Beveridge, together with members of his Cabinet, to visit SOESD-operated classrooms and attend program staff meetings.
- Strategic planning discussions will begin with the Administrative Team in September.
- Superintendent Beveridge meets regularly with Coordinator Bauer and Chief HR Officer Michiels to address Diversity, Equity, and Inclusion (DEI) Planning. Plans are underway to reconvene the SOESD and consortium districts’ DEI committees.
- The superintendent has facilitated and participated in several meetings regarding Behavioral Health Planning that continue to inform SOESD’s developing mental and behavioral support model.
- State-level meetings with Oregon Superintendents and ODE Director Colt Gill regarding COVID-19 have decreased significantly, with what is hoped to be SOESD’s last COVID plan submitted on August 26, 2022.

Administration

A. First Reading of Proposed SOESD Board Policies

This topic was postponed to next month’s agenda.

B. Second Reading of Proposed SOESD Board Policies

The policies listed below were reviewed in a first reading by the Board during the July 20, 2022 meeting. These policies were sent to the Board for review in advance of the meeting and presented for second reading.

- DB ESD Budget
- DBC Budget Calendar
- DBEA Budget Committee
- DBK Budget Transfer Authority
- DD Grant Funding Proposals and Applications
- DDA Local Service Plan
- DFA Investment of Funds
- DGA Authorized Signatures
- DID Property Inventories
- DLC Expense Reimbursements

DN Disposal of ESD Property

IT WAS MOVED BY MEMBER WRIGHT, SECONDED BY MEMBER VALTIERRA-SANCHEZ TO:

Adopt the SOESD board policies as presented.

MOTION CARRIED 6-0

- C. Oregon School Boards Association (OSBA) 2022-2023 Annual Dues
Administration recommended paying annual dues of \$3,111.75 for continued membership in OSBA for the 2022-2023 fiscal year. This is the same amount as last fiscal year.

IT WAS MOVED BY MEMBER WRIGHT, SECONDED BY MEMBER MIDDLETON TO:

Approve 2022-2023 OSBA membership in the amount of \$3,111.75.

MOTION CARRIED 6-0

- D. Nominations for OSBA Board of Directors
OSBA Board of Directors, Position 5, representing the Southern Region, is up for election this year. The position is currently held by Dawn Watson, whose term expires on December 31, 2022. Board members interested in running for a position on the OSBA Board need to be nominated by a member board within their region. Candidate nomination materials are due in the OSBA office by 5:00 PM on Friday, September 30, 2022. None of the SOESD board members present expressed interest in running for the position or making a nomination.

- E. Licensed Job Description: School-Based Mental Health Interventionist
A new licensed job description, School-Based Mental Health Interventionist, was sent to board members for review in advance of the meeting and presented for board approval.

IT WAS MOVED BY MEMBER WRIGHT, SECONDED BY MEMBER MIDDLETON TO:

Approve the licensed job description: School-Based Mental Health Interventionist.

MOTION CARRIED 6-0

- F. ODE Education Staff Retention and Recruitment Grant
SOESD has applied for and been approved to receive funding through an *Education Staff Retention and Recruitment Grant (HB 4030)* from the Oregon Department of Education. The grant application includes a bonus for SOESD employees returning for the 2022-23 school year. Administration requested board approval to implement compensation provisions related to the grant.

- a. MOA Between SOESD and SOBC

A Memorandum of Agreement was ratified by the licensed association's members on September 12, 2022.

IT WAS MOVED BY MEMBER MIDDLETON, SECONDED BY MEMBER VALTIERRA-SANCHEZ TO:

Approve the MOA regarding staff recruitment and retention bonuses with SOBC as presented.

MOTION CARRIED 6-0

- b. MOA Between SOESD and OSEA Chapter #104

A Memorandum of Agreement was ratified by the classified association's members on September 19, 2022.

IT WAS MOVED BY MEMBER WRIGHT, SECONDED BY MEMBER VALTIERRA-SANCHEZ TO:

Approve the MOA regarding staff recruitment and retention bonuses with OSEA as presented.

MOTION CARRIED 6-0

- c. Administration requested board authorization to pay appreciation bonuses to non-bargaining labor groups following the same provisions outlined in the MOAs with the associations.

IT WAS MOVED BY MEMBER MIDDLETON, SECONDED BY MEMBER WRIGHT TO:

Authorize administration to make one-time appreciation bonus payments to employees in non-bargaining labor groups, who have not submitted notice of intent to resign, of \$1400 if hired prior to March 1, 2022, and \$350 if hired after March 1, 2022, prorated by FTE.

MOTION CARRIED 6-0

- G. Contract for Services with Phoenix School of Roseburg (Creating Community Resilience)

CFO Weaver reported that SOESD has been designated as the recipient and distributor of \$840,000 in federal funding for work related to Adverse Childhood Experiences (ACEs) & Resilience in a six-county region (Jackson, Josephine, Coos, Curry, Douglas and Klamath). Funding will support SOESD facilitated initiatives in Jackson and Josephine counties: Southern Oregon Success and Klamath Promise. South Coast ESD will facilitate the work in Coos and Curry counties. Phoenix School of Roseburg (Creating Community Resilience) will be the designated provider in Douglas County. Administration requested authorization to enter into an agreement with Phoenix School of Roseburg not to exceed \$130,000. These services include all aspects of the backbone support needed to administer an ACEs Training Team and facilitate work groups focused on implementing trauma-informed practices.

IT WAS MOVED BY MEMBER WRIGHT, SECONDED BY MEMBER VALTIERRA-SANCHEZ TO:

Approve entering into an agreement with Phoenix School of Roseburg not to exceed \$130,000.

MOTION CARRIED 6-0

- H. Contract for Services with Journalistic Learning Initiative

SOESD has been asked by the Oregon Department of Education to lead a statewide effort to produce a workforce-readiness website/portal related to Career Connected Learning for use statewide. Administration requested authorization to enter into an agreement with Journalistic Learning Initiative not to exceed \$315,000. A contract with ODE provides revenue for this project. Karla Clark, SOESD Program Manager, and Mark Angle-Hobson, Director of School Improvement Services, provided information about the project and answered board members' questions.

IT WAS MOVED BY MEMBER MIDDLETON, SECONDED BY MEMBER WRIGHT TO:

Approve entering into an agreement with Journalistic Learning Initiative not to exceed \$315,000.00.

MOTION CARRIED 6-0

- I. Lease Agreement with Carl D. Johnson Trust

Administration requested board approval to lease office space of approximately 3,500 square feet located at 550 SW 6th Street, Suite 3, Grants

Pass OR 97526. The purpose of the lease is to expand and relocate office space for Regional Inclusive Services itinerant staff. The term of the lease is 60 months at an approximate total cost of \$355,000. CFO Weaver provided information and answered board members' questions.

IT WAS MOVED BY MEMBER WRIGHT, SECONDED BY MEMBER MIDDLETON TO:

Authorize administration to enter into a 60-month lease agreement with Johnson Trust, Carl D. not to exceed \$355,000.

MOTION CARRIED 6-0

- J. Contract for Services with Black Southern Oregon Alliance (BSOA)
Administration requested board approval to enter into an agreement with BSOA not to exceed \$160,000. Services will include planning, publicizing, and implementing the Black Youth Leadership Summit and Black Youth Summer Institute in accordance with the ODE Southern Oregon Black/African American Student Success (SOBAASS) grant. Member Morell noted his research related to content on the BSOA website.

IT WAS MOVED BY MEMBER MIDDLETON, SECONDED BY MEMBER VALTIERRA-SANCHEZ TO:

Approve entering into an agreement with Black Southern Oregon Alliance not to exceed \$160,000.

MOTION CARRIED 5-1 *Member Morell opposed*

Business Services

Related Party Questionnaire

CFO Weaver explained that the Related Party Questionnaire is completed annually to document any related party activities between public health officials and their respective agencies. To document activities of this type, the SOESD's auditors annually request that administrators and board members complete a related party questionnaire. Board members were asked to return their completed Related Party Questionnaire to the board secretary before the November board meeting.

Miscellaneous

- A. Next Regular Meeting: October 19, 2022, 6:00 PM, SOESD Administration Office
- B. OSBA Fall Regional Meeting: October 24, 2022, 6:00 PM Dinner; 6:30 PM Business Meeting. Rogue Regency Inn Banquet Room. Board members planning to attend are asked to let the board secretary know by October 17, 2022.
- C. 2022 OSBA Annual Convention: November 10-13, 2022, Portland Marriott Downtown Waterfront. *Please let the board secretary know if you are interested in attending so that lodging arrangements can be made as soon as the reservation window opens.*

Adjournment

The regular meeting of the SOESD Board of Directors adjourned at 8:19 PM.

SOUTHERN OREGON EDUCATION SERVICE DISTRICT

BOARD OF DIRECTORS FINANCIAL REPORT

September 30, 2022

100	GENERAL FUND	BUDGET	EXPENDED	BALANCE	% SPT	REVENUE	% RECD
101	ADMIN/OPERATIONS	3,047,208.00	974,436.67	2,072,771.33	32.0%		
102	TECHNOLOGY MEDIA SERVICES	2,953,541.00	609,970.19	2,343,570.81	20.7%		
103	SPECIAL EDUC SERVICES	13,751,990.00	189,781.44	13,562,208.56	1.4%		
104	SPEECH	491,350.00	39,046.95	452,303.05	7.9%		
106	INTERPRETERS	1,186,343.00	140,754.70	1,045,588.30	11.9%		
107	PSYCHOLOGY	1,050,280.00	90,042.02	960,237.98	8.6%		
108	BRAILLIST	386,280.00	22,024.01	364,255.99	5.7%		
109	STEPS PLUS PROGRAM	1,800,000.00	176,125.45	1,623,874.55	9.8%		
110	OT / PT	268,550.00	45,940.45	222,609.55	17.1%		
113	REGIONAL/STATEWIDE INITIATIVES	397,946.00	75,621.05	322,324.95	19.0%		
114	CAREER/TECHNICAL ED	305,933.00	66,430.83	239,502.17	21.7%		
115	ENGLISH SECOND LANG	295,098.00	88,244.19	206,853.81	29.9%		
117	AUDIOLOGY	175,000.00	0.00	175,000.00	0.0%		
192	CARE	1,224,000.00	93,655.28	1,130,344.72	7.7%		
TOTAL (100)		27,333,519.00	2,612,073.23	24,721,445.77	9.6%	5,642,480.32	20.6%
September 30, 2021		25,889,265.00	2,688,340.21	23,200,924.79	10.4%	5,231,399.95	20.2%
BOARD ACCOUNTS - 2310		BUDGET	EXPENDED	BALANCE	% SPT		
	340-BOARD TRAVEL	18,000.00	3,260.41	14,739.59	18.1%		
	351-TELEPHONE	515.00	0.00	515.00	0.0%		
	381-AUDIT	13,390.00	0.00	13,390.00	0.0%		
	382-LEGAL SERVICES	61,835.00	39,589.42	22,245.58	64.0%		
	388-ELECTIONS	30,900.00	0.00	30,900.00	0.0%		
	390-OTHER SERVICES	0.00	0.00	0.00	0.0%		
	410-SUPPLIES	796.00	0.00	796.00	0.0%		
	640-DUES & FEES	80,000.00	41,277.75	38,722.25	51.6%		
	651-LIABILITY INS	6,180.00	6,180.00	0.00	100.0%		
TOTAL BOARD ACCTS.		211,616.00	90,307.58	121,308.42	42.7%		
210	SP REV -FEDERAL	BUDGET or AWARD EST	EXPENDED	BALANCE	% SPT	REVENUE	% RECD
0	SPECIAL REVENUE-FEDERAL	12,727,803.00	0.00	12,727,803.00	0.0%	0.00	0.0%
201	IDEA CONSORTIUM	0.00	0.00	0.00	N/A	0.00	N/A
202	TECH PREP ED 21-22	0.00	34,326.22	(34,326.22)	N/A	(93,904.13)	N/A
203	MIDDLE SCHOOL PILOT PROJECT	0.00	0.00	0.00	N/A	0.00	N/A
204	PERKINS BASIC 21-22	0.00	48,950.46	(48,950.46)	N/A	28,057.98	N/A
205	PERKINS BASIC 20-21	0.00	60,342.61	(60,342.61)	N/A	32,693.16	N/A
206	MIG SUMMER SCHL	0.00	569,881.22	(569,881.22)	N/A	95,756.90	N/A
208	TITLE 1C MIG RSY 20-21	0.00	62,540.45	(62,540.45)	N/A	0.00	N/A
209	TITLE 1C MIG RSY 21-22	0.00	460,645.75	(460,645.75)	N/A	171,671.20	N/A

210	TITLE 1C-PRESCHL 21-22	0.00	189,887.86	(189,887.86)	N/A	2,161.75	N/A
211	TITLE 1C PRESCHL 20-21	0.00	94.82	(94.82)	N/A	0.00	N/A
213	TITLE 1-C SUPPLEMENTAL 20-21	0.00	0.00	0.00	N/A	0.00	N/A
214	IDEA REGIONAL	0.00	355,498.87	(355,498.87)	N/A	0.00	N/A
216	ELH SECTOR PLANNING 21-22	0.00	0.00	0.00	N/A	0.00	N/A
217	PP COORDINATED ENROLLMENT	0.00	0.00	0.00	N/A	0.00	N/A
218	INDIAN EDUCATION SERVICES	0.00	7,279.12	(7,279.12)	N/A	0.00	N/A
219	COVID-19 SUPPORT	0.00	42,541.08	(42,541.08)	N/A	12,747.59	N/A
220	ESDs For S E L	0.00	20,005.58	(20,005.58)	N/A	0.00	N/A
235	FAMILY SUPPORT SERVICES 21-23	0.00	7,289.89	(7,289.89)	N/A	0.00	N/A
243	YOUTH TRANSITION PROGRAM	0.00	72,825.72	(72,825.72)	N/A	(22,575.42)	N/A
247	TITLE III CONSORTIUM 21-22	0.00	14,544.95	(14,544.95)	N/A	7,448.20	N/A
248	TITLE III CONSORTIUM 20-21	0.00	0.00	0.00	N/A	0.00	N/A
250	CARL PERKINS - RCC	0.00	0.00	0.00	N/A	0.00	N/A
251	LETS GO LEARN CHILD CARE RESOURCE NETWORK 21-	0.00	0.00	0.00	N/A	0.00	N/A
261	23	0.00	150,840.35	(150,840.35)	N/A	0.00	N/A
262	FAMILY SUPPORT & CONNECTIONS	0.00	82,664.26	(82,664.26)	N/A	0.00	N/A
263	CCRN - 2	0.00	0.00	0.00	N/A	0.00	N/A
264	CCRN RS STUDY	0.00	0.00	0.00	N/A	0.00	N/A
272	EI/ECSE TRANSITION NETWORK	0.00	62,656.09	(62,656.09)	N/A	0.00	N/A
276	COORDINATOR TNF - STUDENT SUMMIT	0.00	0.00	0.00	N/A	0.00	N/A
277	CONFERENCES	0.00	0.00	0.00	N/A	0.00	N/A
278	IDEA ENHANCEMENT 21-22	0.00	0.00	0.00	N/A	0.00	N/A
285	PERKINS RESERVE 21-22	0.00	22,371.75	(22,371.75)	N/A	14,906.11	N/A
287	TBI LIAISON 21-23	0.00	0.00	0.00	N/A	0.00	N/A
288	AUDIOLOGY SUPPORT 21-23	0.00	0.00	0.00	N/A	0.00	N/A
289	PERKINS RESERVE 20-21	0.00	4,318.44	(4,318.44)	N/A	0.00	N/A
292	IDEA ENHANCEMENT 20-21	0.00	0.00	0.00	N/A	0.00	N/A
297	EXTENDED ASSESSMENT 20-21	0.00	0.00	0.00	N/A	0.00	N/A
307	LTCT IDEA 619	0.00	0.00	0.00	N/A	0.00	N/A
308	LTCT TITLE 1D 21-22	0.00	887.05	(887.05)	N/A	0.00	N/A
309	LTCT IDEA 21-22	0.00	0.00	0.00	N/A	0.00	N/A
311	MIECHV	0.00	0.00	0.00	N/A	10,899.17	N/A
313	OCDD	0.00	8,561.02	(8,561.02)	N/A	0.00	N/A
316	MTSS REGIONAL COACHES	0.00	9,620.07	(9,620.07)	N/A	9,027.88	N/A
318	HS MATH PATHWAY CONVENING	0.00	0.00	0.00	N/A	0.00	N/A
319	ESSER A3	0.00	149,016.21	(149,016.21)	N/A	0.00	N/A

TOTAL (210)	12,727,803.00	2,437,589.84	10,290,213.16	19.2%	268,890.39	2.1%
September 30, 2021	10,403,807.00	2,111,079.78	8,292,727.22	20.3%	471,295.94	4.5%

		BUDGET or			%		%
290	SP REV -OTHER	AWARD EST	EXPENDED	BALANCE	SPT	REVENUE	RECD
0	SPECIAL REVENUE-OTHER	27,126,671.00	0.00	27,126,671.00	0.0%	0.00	0.0%
717	PP COORDINATED ENROLLMENT	0.00	40,934.84	(40,934.84)	N/A	0.00	N/A
718	GYO GRANT	0.00	46,960.00	(46,960.00)	N/A	80,555.87	N/A
719	COVID-19 SUPPORT	0.00	0.00	0.00	N/A	0.00	N/A
749	EDUCATOR ADVANCEMENT FUND	0.00	71,782.99	(71,782.99)	N/A	0.00	N/A
751	ADV MATH IN REAL LIFE ADV STEM INNOVATIVE	0.00	0.00	0.00	N/A	0.00	N/A
753	PROGRAMMING	0.00	0.00	0.00	N/A	0.00	N/A

754	MEDIA LIBRARY SERVICES	0.00	0.00	0.00	N/A	0.00	N/A
756	SUMMER LEARNING GRANT	0.00	0.00	0.00	N/A	59,580.00	N/A
757	LONG TERM CARE TREATMENT	0.00	28,726.44	(28,726.44)	N/A	0.00	N/A
758	WESD DASHBOARD	0.00	0.00	0.00	N/A	0.00	N/A
759	FCCN	0.00	14,222.94	(14,222.94)	N/A	0.00	N/A
760	CPDP	0.00	0.00	0.00	N/A	6,566.43	N/A
761	CCRN SUPPORT	0.00	0.00	0.00	N/A	4,596.38	N/A
762	CTE REVITALIZATION GRANT	0.00	0.00	0.00	N/A	0.00	N/A
763	SUCCESSFUL TRANSITIONS GRANT	0.00	0.00	0.00	N/A	0.00	N/A
765	SUPPORT - CTE CAREER PATHWAYS	0.00	0.00	0.00	N/A	0.00	N/A
766	SCHOOL READINESS HUB	0.00	0.00	0.00	N/A	0.00	N/A
767	SHA FAMILY SERVICES HUB	0.00	32,752.78	(32,752.78)	N/A	0.00	N/A
768	EMERGING REGIONAL STEM HUB	0.00	65,997.74	(65,997.74)	N/A	26,414.34	N/A
769	REGIONAL EDUCATOR NETWORK (SOREN)	0.00	48,631.52	(48,631.52)	N/A	0.00	N/A
770	LTCT ADDITIONAL SERVICES	0.00	0.00	0.00	N/A	4,205.82	N/A
772	STEM INNOVATIVE PROGRAMMING 21-23	0.00	0.00	0.00	N/A	0.00	N/A
773	PRESCHOOL PROMISE	0.00	0.00	0.00	N/A	0.00	N/A
774	PRESCHOOL PROMISE - COORDINATION	0.00	1,546.89	(1,546.89)	N/A	141,669.31	N/A
776	OREGON SCIENCE PROJECT	0.00	0.00	0.00	N/A	0.00	N/A
777	R & R COMMUNITIES	0.00	0.00	0.00	N/A	0.00	N/A
778	THREAT ASSESSMENT PROGRAM	0.00	19,995.00	(19,995.00)	N/A	9,014.08	N/A
779	CCR&R PRESCHOOL PROMISE SSA	0.00	0.00	0.00	N/A	0.00	N/A
780	CCRR SSA PROFESSIONAL LEARNING	0.00	179.14	(179.14)	N/A	0.00	N/A
781	CCRR SSA PSP ADMIN	0.00	26,272.44	(26,272.44)	N/A	0.00	N/A
782	CCRR SSA PSP COACHING	0.00	34,017.83	(34,017.83)	N/A	0.00	N/A
783	SHARED SERVICES - SSA BUSINESS COACHING	0.00	15,357.20	(15,357.20)	N/A	(31,735.15)	N/A
802	CLASSROOM AT CRATER LAKE	0.00	0.00	0.00	N/A	373.99	N/A
804	ODE INTEL	0.00	0.00	0.00	N/A	3,386.74	N/A
805	OI SERVICES	0.00	0.00	0.00	N/A	0.00	N/A
806	MATH IN REAL LIFE	0.00	0.00	0.00	N/A	0.00	N/A
807	PERS VARIANCE ACCOUNT	0.00	0.00	0.00	N/A	17,299.69	N/A
808	LEAD LEARN EXCEL	0.00	0.00	0.00	N/A	5,451.99	N/A
809	AMBITIOUS INSTRUCTION	0.00	0.00	0.00	N/A	0.00	N/A
SUBTOTAL-290		27,126,671.00	447,377.75	26,679,293.25	1.6%	327,379.49	1.2%
		BUDGET or			%		%
290	SP.REV.-OTHER	AWARD EST	EXPENDED	BALANCE	SPT	REVENUE	RECD
SUBTOTAL-290		27,126,671.00	447,377.75	26,679,293.25	1.6%	327,379.49	1.2%
810	SOTCE	0.00	0.00	0.00	N/A	0.00	N/A
811	ELP PARENT SUPPORT	0.00	0.00	0.00	N/A	0.00	N/A
812	AIAN EDUCATOR SUCCESS	0.00	0.00	0.00	N/A	0.00	N/A
813	ATTENDANCE INITIATIVE	0.00	0.00	0.00	N/A	0.00	N/A

814	REGIONAL ABSENTEESIM INITIATIVE	0.00	0.00	0.00	N/A	0.00	N/A
815	SOESD-SPEC ED SERVICES	0.00	0.00	0.00	N/A	68.29	N/A
816	STUDENT SUCCESS ACT	0.00	560,159.49	(560,159.49)	N/A	611,648.00	N/A
817	ADV PROGRAM EXPANSION	0.00	0.00	0.00	N/A	0.00	N/A
818	AIAN STUDENT SUCCESS JaJo	0.00	0.00	0.00	N/A	0.00	N/A
819	AIAN STUDENT SUCCESS KLAMATH	0.00	0.00	0.00	N/A	0.00	N/A
821	OETC/ODE ONLINE	0.00	0.00	0.00	N/A	2,784.62	N/A
822	GILBERT CREEK PLAYGROUND	0.00	0.00	0.00	N/A	157.94	N/A
823	ATTENDANCE DONATION ACCOUNT	0.00	0.00	0.00	N/A	49.89	N/A
824	ROLLOVER FUNDS	0.00	0.00	0.00	N/A	0.00	N/A
825	STATE - R A C	0.00	58,029.57	(58,029.57)	N/A	17,131.54	N/A
828	TARGET GRANT	0.00	0.00	0.00	N/A	0.00	N/A
829	MIGRANT/ELL WORKSHOP	0.00	210.00	(210.00)	N/A	(511.89)	N/A
830	FOCUSED NETWORK FUNDING	0.00	0.00	0.00	N/A	0.00	N/A
831	CTE WORKSHOP ACCOUNT	0.00	0.00	0.00	N/A	3,884.71	N/A
836	INDIAN ED DONATION ACCOUNT	0.00	0.00	0.00	N/A	21,783.94	N/A
838	TAPESTRY GRANT	0.00	0.00	0.00	N/A	71.96	N/A
839	CC4A PROGRAM SUPPORT	0.00	3,507.40	(3,507.40)	N/A	710.94	N/A
840	SOBAASS	0.00	34,350.56	(34,350.56)	N/A	0.00	N/A
841	TRUANCY GRANT	0.00	0.00	0.00	N/A	285.30	N/A
842	FORD FAMILY FOUNDATION	0.00	25,000.00	(25,000.00)	N/A	25,000.00	N/A
843	STEM INNOVATION	0.00	12,946.42	(12,946.42)	N/A	0.00	N/A
845	SUPERINTENDENT ASSOC LUNCHES	0.00	0.00	0.00	N/A	153.09	N/A
849	OEA WELLNESS - MENTORING	0.00	0.00	0.00	N/A	0.00	N/A
850	WELLNESS GRANT	0.00	0.00	0.00	N/A	6,877.63	N/A
852	ZELZIE REED TRUST	0.00	0.00	0.00	N/A	15,369.96	N/A
853	MENTORING TEACHER 21-22	0.00	21,414.67	(21,414.67)	N/A	25,416.35	N/A
854	GRAY FAMILY FUND	0.00	0.00	0.00	N/A	955.00	N/A
855	MIGRANT DONATIONS	0.00	0.00	0.00	N/A	3,728.44	N/A
857	SPEC ED WORKSHOP ACCT	0.00	16,678.23	(16,678.23)	N/A	43,236.01	N/A
858	MEDIA LIBRARY REPLACE MATERIALS	0.00	12,250.00	(12,250.00)	N/A	14,984.17	N/A
859	ED TECH SUMMIT	0.00	740.05	(740.05)	N/A	25,131.41	N/A
860	CLIMATE CHANGE EDUC-CLASS AT CL	0.00	0.00	0.00	N/A	327.64	N/A

SUBTOTAL-290	27,126,671.00	1,192,664.14	25,934,006.86	4.4%	1,146,624.43	4.2%
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BUDGET or				%		%
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290 SP.REV.-OTHER	AWARD EST	EXPENDED	BALANCE	SPT	REVENUE	RECD
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SUBTOTAL-290	27,126,671.00	1,192,664.14	25,934,006.86	4.4%	1,146,624.43	4.2%
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865	REGIONAL PROMISE	0.00	0.00	0.00	N/A	0.00	N/A
866	KINDERMUSIK	0.00	0.00	0.00	N/A	9,453.10	N/A
867	COW CREEK FOUNDATION	0.00	0.00	0.00	N/A	5,980.00	N/A
868	PLUM CREEK FOUNDATION	0.00	0.00	0.00	N/A	0.00	N/A

869	FOURWAY FOUNDATION	0.00	0.00	0.00	N/A	15,348.65	N/A
872	EI/ECSE	0.00	235,696.48	(235,696.48)	N/A	0.00	N/A
873	PROGRAM SUPPORT EI/ECSE	0.00	85,809.95	(85,809.95)	N/A	887,388.98	N/A
874	PRESCHOOL PROMISE - STARTUP	0.00	0.00	0.00	N/A	0.00	N/A
876	TRANSITION NETWORK FACILITATOR	0.00	40,396.56	(40,396.56)	N/A	0.00	N/A
881	EDUCATIONAL INSTRUCTION	0.00	0.00	0.00	N/A	(2,564.74)	N/A
882	EARLY LEARNING HUB	0.00	169,768.00	(169,768.00)	N/A	842,729.79	N/A
888	CTE - EQUIPMENT REIMBURSEMENT	0.00	0.00	0.00	N/A	141,975.08	N/A
889	ADV REGIONAL STEM HUB	0.00	0.00	0.00	N/A	0.00	N/A
900	MATHWASY - RPD	0.00	14,613.61	(14,613.61)	N/A	0.00	N/A
901	SOESD PROGRAM SUPPORT	0.00	31,722.52	(31,722.52)	N/A	1,483,558.14	N/A
904	RETIRE/SABATICAL	0.00	8,063.88	(8,063.88)	N/A	1,483,513.77	N/A
905	FMLA	0.00	0.00	0.00	N/A	63,123.97	N/A
906	HB4030	0.00	366,100.98	(366,100.98)	N/A	0.00	N/A
910	SUMMER SP-ED SERVICES	0.00	31,055.20	(31,055.20)	N/A	0.00	N/A
912	SPECIAL PROJECTS	0.00	0.00	0.00	N/A	353.98	N/A
913	WRITING ASSESSMENT	0.00	0.00	0.00	N/A	4,436.05	N/A
915	REGIONAL-LOCAL CONTRACTS	0.00	50,841.47	(50,841.47)	N/A	0.00	N/A
916	STATE REGIONAL	0.00	228,696.70	(228,696.70)	N/A	1,109.20	N/A
918	K PARTNERSHIP INNOVATION	0.00	56,510.35	(56,510.35)	N/A	0.00	N/A
920	R & B DONATIONS (Rice & Beans)	0.00	0.00	0.00	N/A	192.63	N/A
921	MEYER MEMORIAL	0.00	10,854.92	(10,854.92)	N/A	10,854.92	N/A
924	SOU TECHNOLOGY	0.00	0.00	0.00	N/A	1,946.35	N/A
926	AUTISM - PARENT PARTNER	0.00	503.58	(503.58)	N/A	12,934.83	N/A
929	ADV REGIONAL PROMISE	0.00	0.00	0.00	N/A	0.00	N/A
930	ADV KPI	0.00	0.00	0.00	N/A	0.00	N/A
931	BRAILLIST PRODUCTION	0.00	0.00	0.00	N/A	9,375.32	N/A
932	KLAMATH TECH	0.00	0.00	0.00	N/A	1,749.66	N/A
935	STAFF CONTRACTS	0.00	37,155.68	(37,155.68)	N/A	66,390.12	N/A
938	GARDEN PROJECT GRANT	0.00	0.00	0.00	N/A	24.50	N/A
940	CESD - SOBAASS	0.00	93,016.00	(93,016.00)	N/A	83,714.40	N/A
941	READING GRANT	0.00	0.00	0.00	N/A	2,324.09	N/A
942	FOLLETTE CONTRACT	0.00	2,729.09	(2,729.09)	N/A	26,606.81	N/A
SUBTOTAL-290		27,126,671.00	2,656,199.11	24,470,471.89	9.8%	6,299,144.03	23.2%
		BUDGET or			%		%
290	SP.REV.-OTHER	AWARD EST	EXPENDED	BALANCE	SPT	REVENUE	RECD
SUBTOTAL-290		27,126,671.00	2,656,199.11	24,470,471.89	9.8%	6,299,144.03	23.2%
943	YTP PROGRAM	0.00	13,114.47	(13,114.47)	N/A	22,575.42	N/A
945	ESD WORKSHOP	0.00	0.00	0.00	N/A	18,549.95	N/A
946	AURAL IMPRESSION	0.00	0.00	0.00	N/A	154,436.08	N/A
947	CURRICULUM WORKSHOP	0.00	0.00	0.00	N/A	6,324.89	N/A

948	WEB PD	0.00	0.00	0.00	N/A	1,693.68	N/A
949	BVIS FUNDING	0.00	0.00	0.00	N/A	17,510.60	N/A
951	EMPLOYEE PAID MEDICAL	0.00	0.00	0.00	N/A	0.00	N/A
952	INSURANCE RESERVE	0.00	0.00	0.00	N/A	23,693.04	N/A
953	FINGERPRINTING	0.00	0.00	0.00	N/A	33,643.57	N/A
955	INFRASTRUCTURE-SOESD	0.00	31,911.82	(31,911.82)	N/A	1,342,173.02	N/A
957	OR PROJECT	0.00	4,968.55	(4,968.55)	N/A	302,580.08	N/A
960	COOP PURCHASING	0.00	260,982.89	(260,982.89)	N/A	240,089.06	N/A
961	COOP PURCHASING SUPPORT	0.00	12,204.98	(12,204.98)	N/A	1,132.02	N/A
964	EMPLOYEE SERVICES	0.00	185.58	(185.58)	N/A	870.60	N/A
965	MIG PROGRAM SUPPORT	0.00	0.00	0.00	N/A	2,345.17	N/A
966	PDHH DONATIONS	0.00	0.00	0.00	N/A	2,810.00	N/A
967	BRAIN BOWL	0.00	0.00	0.00	N/A	6,010.10	N/A
972	PVI DONATIONS	0.00	0.00	0.00	N/A	3,888.17	N/A
974	SHARED READING PROGRAM	0.00	0.00	0.00	N/A	117.22	N/A
976	TELECONFERENCING	0.00	0.00	0.00	N/A	7,118.48	N/A
978	SCHOOL IMPROVEMENT WORKSHOPS	0.00	500.81	(500.81)	N/A	122,962.96	N/A
982	READING RED	0.00	0.00	0.00	N/A	813.96	N/A
983	OREGON ONLINE	0.00	0.00	0.00	N/A	38,573.67	N/A
989	ADV CTE REVITALIZATION	0.00	0.00	0.00	N/A	0.00	N/A
990	MEDICAID ADMN CLAIMING	0.00	126,106.60	(126,106.60)	N/A	96,582.48	N/A
991	MAC DISTRICTS	0.00	10,589.65	(10,589.65)	N/A	(131.78)	N/A
996	OREGON COMMUNITY FOUNDATION	0.00	10,623.29	(10,623.29)	N/A	145,412.59	N/A
998	COMPUTER REPLACEMENT	0.00	0.00	0.00	N/A	0.00	N/A
999	INDIRECT COST POOL	0.00	220,492.62	(220,492.62)	N/A	1,997,816.73	N/A

TOTAL (290)	27,126,671.00	3,347,880.37	23,778,790.63	12.3%	10,888,735.79	40.1%
September 30, 2021	25,883,050.00	3,526,023.77	22,357,026.23	13.6%	10,567,295.17	40.8%

						%	%
400	CAPITAL PROJECTS FUND	BUDGET	EXPENDED	BALANCE	SPT	REVENUE	RECD
000	CAPITAL PROJECTS FUND	0.00	0.00	0.00	N/A	0.00	N/A
410	PHOENIX FACILITY	9,000,000.00	145,066.71	8,854,933.29	1.6%	3,557,794.28	39.5%
TOTAL (400)		9,000,000.00	145,066.71	8,854,933.29	1.6%	3,557,794.28	39.5%
September 30, 2021		1,675,000.00	0.00	1,675,000.00	0.0%	0.00	0.0%

						%	%
600	INTERNAL SERVICE	BUDGET	EXPENDED	BALANCE	SPT	REVENUE	RECD
000	INTERNAL SERV BUDGET	0.00	0.00	0.00	N/A	0.00	N/A
651	SUBSTITUTE SERVICES	4,083,130.00	188,207.69	3,894,922.31	4.6%	169,420.28	4.1%
655	WORKER'S COMP/MEDICAL	1,092,169.00	648,124.75	444,044.25	59.3%	1,551,598.13	142.1%
662	SB1049 - PERS	230,000.00	605.04	229,394.96	0.3%	177,738.41	77.3%

675	INTERNAL IT SUPPORT	259,875.00	0.00	259,875.00	0.0%	0.00	0.0%
694	PL OREGON	80,360.00	0.00	80,360.00	0.0%	0.00	0.0%
695	D P B	75,000.00	0.00	75,000.00	0.0%	0.00	0.0%
696	UNEMPLOYMENT ACCT	245,203.00	7,382.94	237,820.06	3.0%	556,922.61	227.1%
697	COPIES / FAX USAGE	146,546.00	12,128.14	134,417.86	8.3%	128,202.23	87.5%
TOTAL (600)		6,212,283.00	856,448.56	5,355,834.44	13.8%	2,583,881.66	41.6%
September 30, 2021		7,753,592.00	586,792.67	7,166,799.33	7.6%	2,514,945.15	32.4%

RECAP BY FUND		BUDGET or AWARD EST	EXPENDED	BALANCE	% SPT	REVENUE	% RECD
100	GENERAL FUND	27,333,519.00	2,612,073.23	24,721,445.77	9.6%	5,642,480.32	20.6%
210	SP REV - FEDERAL	12,727,803.00	2,437,589.84	10,290,213.16	19.2%	268,890.39	2.1%
290	SP REV - OTHER	27,126,671.00	3,347,880.37	23,778,790.63	12.3%	10,888,735.79	40.1%
400	CAPITAL PROJECTS FUND	9,000,000.00	145,066.71	8,854,933.29	1.6%	3,557,794.28	39.5%
600	INTERNAL SERVICE	6,212,283.00	856,448.56	5,355,834.44	13.8%	2,583,881.66	41.6%
TOTAL ALL FUNDS		82,400,276.00	9,399,058.71	73,001,217.29	11.4%	22,941,782.44	27.8%
September 30, 2021		71,604,714.00	8,912,236.43	62,692,477.57	12.4%	18,784,936.21	26.2%
FUND BAL - 9/30/2022		<u>13,542,723.73</u>					
FUND BAL - 9/30/2021		<u>9,872,699.78</u>					

SOESD Superintendent's Meeting Schedule
October, November, and December 2022

October 2022

- 4 Cabinet Meeting
Cabinet's Visit to STEPS Plus Learning Center 1 and Learning Center 2
Emergency Operations Planning with Kylee Harrison, Program Manager for Mental and Behavioral Health
- 5 SOESD Education Association Labor-Management Meeting
Business / Education Coordination Meeting with Jim Fong, Rogue Workforce Board Executive Director, Mark Angle-Hobson, School Improvement Director, Brian Robin, Career Technical Education Coordinator, Karla Clarke, STEAM Hub Program Manager, and Hal Jones, Medford School District Career Readiness Coordinator
Phoenix Campus Reconstruction Project: Advisory Group Meeting with Migrant Ed/ELL/Indian Ed
- 6 Program Planning with Daniel Weaver, Chief Financial Officer
Program Planning with Patty Michiels, Chief Human Resources Officer
- 7 Phoenix Campus Reconstruction: Advisory Group Meeting with School Improvement Team
- 9-11 OAESD Superintendents Retreat
- 12 Policy Review with Rick Stucky, OSBA Policy Services Specialist, Jessica Bach, Executive Assistant, and Daniel Weaver, Chief Financial Officer
Program Planning with Charlie Bauer, Coordinator, Migrant/ELL/Indian Education/SOBASS
- 13 Program Planning with Daniel Weaver, Chief Financial Officer
Program Planning with Patty Michiels, Chief Human Resources Officer
Program Planning with Mark Angle-Hobson, School Improvement Services Director
Meeting with Jackson County Superintendents and Jackson County Public Health
Program Planning with Coree Kelly, Chief Information Officer
- 14 Interpreter Training
- 17 Regional Advisory Council Meeting
Phoenix Campus Reconstruction: SPESD Phoenix - STEPS Plus Landscape
Southern Oregon Superintendents Meeting
Contract Negotiations with the Classified Association, OSEA Chapter #104
- 18 Cabinet Meeting
Program Planning with Coree Kelly, Chief Information Officer
- 19 Special Education Management Team Meeting
SOESD Board of Directors Meeting
- 20 Phoenix Campus Reconstruction: Advisory Group Meeting with Deaf and Hard of Hearing Team
Program Planning with Daniel Weaver, Chief Financial Officer
Phoenix Campus Reconstruction: Advisory Group Meeting with Vision Impairment Team
Program Planning with Patty Michiels, Chief Human Resources Officer
Program Planning with Mark Angle-Hobson, School Improvement Services Director
Cabinet's Visit with Family Support & Connections Staff
- 24 Program Planning with Susan Peck, Special Education Director
Policy Review with Rick Stucky, OSBA Policy Services Specialist, Jessica Bach, Executive Assistant, and Daniel Weaver, Chief Financial Officer
OSBA Fall Regional Meeting
- 25 Cabinet Meeting
Program Planning with Coree Kelly, Chief Information Officer
Medford 2040 Vision Implementation Committee
- 26 Cabinet's Visit with Child Care Resource Network (CCRN) Program Staff
Administrative Team Meeting

- 27 OAESD/ODE Program Cabinet Meeting
- Program Planning with Daniel Weaver, Chief Financial Officer
- Phoenix Campus Reconstruction: EWP Reconciliation with HMK Company
- Program Planning with Patty Michiels, Chief Human Resources Officer
- Program Planning with Mark Angle-Hobson, School Improvement Services Director
- Meeting with Jackson County Superintendents and Jackson County Public Health
- 28 Rogue Workforce Partnership Board Meeting
- 31 Program Planning with Susan Peck, Special Education Director
- Cabinet's Visit with Autism Services Staff

November 2022

- 1 Cabinet Meeting
- Program Planning with Coree Kelly, Chief Information Officer
- Contract Negotiations with the Classified Association, OSEA Chapter #104
- 2 SOESD Education Association Labor-Management Meeting
- Policy Review with Rick Stucky, OSBA Policy Services Specialist, Jessica Bach, Executive Assistant
- Cabinet's Visit with Howard STEPS Care Classroom
- 3 Program Planning with Daniel Weaver, Chief Financial Officer
- Program Planning with Patty Michiels, Chief Human Resources Officer
- Program Planning with Mark Angle-Hobson, School Improvement Services Director
- Cabinet's Visit with Electronic Services Team
- 4 COSA OASE Executive Committee
- 7 Program Planning with Susan Peck, Special Education Director
- Cabinet's Visit with School Improvement Team
- Program Planning with Charlie Bauer, Coordinator, Migrant/ELL/Indian Education/SOBASS
- Phoenix Campus Reconstruction: Site Committee Public Meeting (tentative)
- 8 Cabinet Meeting
- Program Planning with Peter Buckley, Southern Oregon Success (SORS) Program Manager
- COSA Meeting with Oregon Superintendents and ODE Executive Director Colt Gill
- 9 Cabinet's Visit with Crater STEPS Care Classroom
- 10 OAESD Governance Council Meeting
- OAESD Summit
- 11-13 Oregon School Boards Association (OSBA) Annual Convention
- 14 Program Planning with Susan Peck, Special Education Director
- Diversity, Equity, and Inclusion Planning with Charlie Bauer, Migrant Ed/ELL/Indian Education Coordinator and Patty Michiels, Chief Human Resources Officer
- 15 Cabinet Meeting
- Program Planning with Coree Kelly, Chief Information Officer
- Southern Oregon Early Learning Services (SOELS) Governance Council Meeting
- 16 Special Education Management Team Meeting
- Reserved for Site / Team Visits with Cabinet
- SOESD Board of Directors Meeting
- 17 Program Planning with Daniel Weaver, Chief Financial Officer
- Program Planning with Patty Michiels, Chief Human Resources Officer
- Program Planning with Mark Angle-Hobson, School Improvement Services Director
- 21 Program Planning with Susan Peck, Special Education Director
- Southern Oregon Superintendents Meeting
- 22 Cabinet's Visit with Gilbert Creek Early Childhood Services Team
- Program Planning with Coree Kelly, Chief Information Officer
- 23 Reserved for Site / Team Visits with Cabinet

- Administrative Team Meeting
- 28 Program Planning with Susan Peck, Special Education Director
Policy Review with Rick Stucky, OSBA Policy Services Specialist, Jessica Bach, Executive Assistant
- 29 Cabinet Meeting
Program Planning with Coree Kelly, Chief Information Officer
- 30 Reserved for Site / Team Visits with Cabinet

December 2022

- 1 Program Planning with Daniel Weaver, Chief Financial Officer
Program Planning with Patty Michiels, Chief Human Resources Officer
Program Planning with Mark Angle-Hobson, School Improvement Services Director
Phoenix Campus Reconstruction: Core Team Meeting
- 5 Program Planning with Susan Peck, Special Education Director
- 6 Cabinet Meeting
Program Planning with Coree Kelly, Chief Information Officer
- 7-8 SOESD Education Association Labor-Management Meeting
COSA Law Conference
- 7 COSA Meeting with Oregon Superintendents and ODE Executive Director Colt Gill
- 8 Program Planning with Daniel Weaver, Chief Financial Officer
Program Planning with Patty Michiels, Chief Human Resources Officer
Program Planning with Mark Angle-Hobson, School Improvement Services Director
Meeting with Jackson County Superintendents and Jackson County Public Health
- 12 Program Planning with Susan Peck, Special Education Director
Diversity, Equity, and Inclusion Planning with Charlie Bauer, Migrant Ed/ELL/Indian Education Coordinator and Patty Michiels, Chief Human Resources Officer
- 13 Cabinet Meeting
Program Planning with Peter Buckley, Southern Oregon Success (SORS) Program Manager
- 14 Reserved for Site / Team Visits with Cabinet
- 15 Program Planning with Daniel Weaver, Chief Financial Officer
Program Planning with Patty Michiels, Chief Human Resources Officer
Program Planning with Mark Angle-Hobson, School Improvement Services Director
- 19 Phoenix Campus Reconstruction: School Improvement Team Meeting
Southern Oregon Superintendents Meeting
Continuum of Care (CoC) Board Meeting Regarding Housing/Homelessness
- 20 Cabinet Meeting
Program Planning with Coree Kelly, Chief Information Officer
- 21 Special Education Management Team Meeting
- 22 Program Planning with Daniel Weaver, Chief Financial Officer
Program Planning with Patty Michiels, Chief Human Resources Officer
Program Planning with Mark Angle-Hobson, School Improvement Services Director
Meeting with Jackson County Superintendents and Jackson County Public Health

SOUTHERN OREGON ESD BUDGET CALENDAR
2023-2024 BUDGET YEAR

July 15, 2022	Deadline to certify the tax levy to the county assessor (ED-50).
July 20 2022	Regular Board Meeting Organize the board, ORS 255.335 (5) and ORS 332.040, and designate the budget officer. ORS 294.331
September 21, 2022	Regular Board Meeting
October 19, 2022	Regular Board Meeting
November 16, 2022	Regular Board Meeting
December 31, 2022	Last day to file the previous school year’s audit with the Department of Education. Failure to file precludes the district from receiving further payments from the School Support Fund until such reports are filed. ORS 327.137
January 18, 2023	Regular Board Meeting
February 15, 2023	Regular Board Meeting
March 15, 2023	Regular Board Meeting
April 10, 2023	Publish NOTICE OF FIRST MEETING OF THE BUDGET COMMITTEE in a newspaper of general circulation in the district. (Notice to be published not more than 30 days prior to the date of this meeting and not less than 5 days prior to the SECOND NOTICE OF BUDGET COMMITTEE MEETING.) The notice may be published once in a newspaper, not more than 30 days before the meeting date and not less than five days before the meeting date, and once on the municipal corporation’s Internet website, in a prominent manner and maintained on the website for at least 10 days before the meeting date. The newspaper notice must contain the Internet website address at which the notice is posted. ORS 294.426

(Sample) NOTICE OF BUDGET COMMITTEE MEETING

NOTICE IS HEREBY GIVEN, pursuant to ORS 294.426, that a meeting of the budget committee of _____, District No. _____ will be held on the _____ day of _____, 2023 at _____ o’clock for the purpose of receiving the budget message and budget document of said district for the fiscal year 2023-2024. This is a public meeting where deliberations of the budget committee will take place, and any person may appear and discuss proposed programs with the budget committee at that time. A copy of the budget document will be available at (address where budget committee meeting will take place) at the time of the meeting.

Name of Budget Officer

April 19, 2023	Regular Board Meeting
May 1, 2023	Publication of the SECOND NOTICE OF BUDGET COMMITTEE MEETING. (Notice to be published not later than 5 days prior to the date of this meeting.) ORS 294.426
May 1, 2023	At any time prior to the meeting of the budget committee at which the budget committee will receive the budget message and the budget document, the budget officer may provide a copy of the budget document to each member of the budget committee for the information and use of the individual member. ORS 294.426(6)(a)
May 10, 2023	First Meeting of the Budget Committee
	Elect presiding officer. Presentation of the budget message by the executive officer and the budget document by the budget officer. Consider recommendations from citizens. Announce the time and place of next meeting. The budget committee shall schedule meetings as required; it may request information and compel the attendance of any employee at its meetings. ORS 294.428 (2) All meetings shall be open to the public. The budget document is filed in the district office as a public record, and a copy of the document or part thereof is made available to any person requesting it. A majority of the members of the budget committee is required to pass any motion. ORS 174.130
May 17, 2023	Regular Board Meeting
May 21, 2023	Publication of the NOTICE OF BUDGET HEARING (ED 1). ORS 294.438
June 21, 2023	Regular Board Meeting
	Public Hearing on the Budget , as approved by the budget committee, shall be conducted by no less than a quorum of the board. ORS 294.453
	Enact resolutions adopting the budget, making the appropriations, imposing and categorizing the taxes. At the time the budget is adopted, the total expenditures in any fund may be increased by \$5,000 or ten (10) percent whichever is greater, provided that the tax levy as published is not increased. To exceed either of these restrictions would require republication of the Financial Summary and Fund Summaries, a Second Notice, and another public hearing, prior to July 1. ORS 294.456 and OAR 150-294.456(1)-(C)
July 15, 2023	Deadline to certify the tax levy to the county assessor on form ED-50.
July 19, 2023	Regular Board Meeting