

AGENDA

Southern Oregon Education Service District BOARD OF DIRECTORS REGULAR MEETING

6:00 PM – Wednesday, April 19, 2023
SOESD Administration Office
101 North Grape Street, Medford OR 97501



1. Preliminary

- A. Call to Order / Roll Call
- B. Land Acknowledgement
- C. Pledge of Allegiance
- D. Comments from Representatives of the Associations
- E. *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 April, May, and June 2023

4. Administration

- A. Second Reading of SOESD Board Policies
- B. 2023-2024 Chamber Memberships
- C. Regional Advisory Council Appointment – Board Member Representation
- D. 2022-2023 SOESD Resolution #9: OAESD Support Network for 2023-2026
- E. Budget and Legislative Update
- F. Phoenix Campus Reconstruction Update
- G. Strategic Planning Update

5. Business Services

2022-2023 SOESD Resolution 10: Adopt and Appropriate

6. Miscellaneous

- A. Budget Committee Meeting: May 10, 2023, 6:00 PM
- B. Next Regular Meeting: May 17, 2023, 6:00 PM
- C. OAESD Spring Conference, May 10-12, 2023, Sunriver Resort

7. 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, April 19, 2023: <https://forms.gle/Mk4fFLDHxq2MpCv96>

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

ANNOTATED AGENDA
Southern Oregon Education Service District
Board of Directors Regular Meeting
SOESD Administration Office | 101 North Grape Street | Medford OR
97501 6:00 PM – Wednesday, April 19, 2023

1. Preliminary

- A. Call to Order / Roll Call
- B. Land Acknowledgement
Southern Oregon Education Service District and the areas in which we serve are located within the ancestral homelands of the Shasta, Takelma, Latgawa, Modoc, and the Yahooskin-Paiute peoples who lived here since time immemorial. The full text of the land acknowledgement can be read on the SOESD website at this link: <https://www.soesd.k12.or.us/equity/>
- C. Pledge of Allegiance
- D. Comments from Representatives of the Associations
- E. Requests to Address Agenda Items

2. Consent Agenda

- A. Approval of Agenda
- B. Approval of Minutes:
 - March 15, 2023, Work Session ([Page 5](#))
 - March 15, 2023 Regular Meeting ([Pages 6-9](#))
- C. Personnel Report
 - New Licensed Hires**
Administration recommends the offer of an employment contract to Shannon Bilbao, Early Intervention Specialist.
 - Requests for Unpaid Leave of Absence**
Administration has received a request for unpaid At-Home Leave from Ashley Dibble, ECSE Behavior Specialist, from February 13, 2023 through June 9, 2023. At-home leave is a provision under Article 15.B of the Collective Bargaining Agreement with the licensed association. Administration recommends the board approve Ms. Dibble’s request for unpaid at-home leave. A position fitting Ms. Dibble’s qualifications will be available upon return.
- D. Financial Report
The financial report for the period ending March 31, 2023 is included for your review. ([Pages 10-17](#))
PROPOSED ACTION: Move to approve the consent agenda as presented.

3. Communications

SOESD Superintendent’s Schedule of Meetings for April, May, and June 2023
Superintendent Beveridge will review his calendar of scheduled meetings for the three-month period. ([Pages 18-22](#))

4. Administration

- A. Second Reading of SOESD Board Policies
The board policies listed below were presented for first reading during the March 15, 2023 regular meeting. These policies are provided as a separate email attachment and presented for second reading and potential approval.

Second Reading: Proposed Policies Section E: Support Services
EEACD..... Use of ESD Activity Vehicles for Student Transportation

EEBB	Use of Private Vehicles for ESD Business
EHA.....	Health Insurance Portability and Accountability Act
Second Reading: Proposed Policies Section G: Personnel	
GAB	Job Descriptions
GBA	Equal Employment Opportunity
GBC.....	Staff Ethics
GBCA	Staff Dress and Grooming
GBD	Board-Staff Communication
GBDA	Expression of Milk in the Workplace
GBE.....	Staff Health and Safety
GBEA	Workplace Harassment
GBEB.....	Communicable Disease – Staff
GBEC.....	Drug-Free Workplace
GBK.....	Prohibited Use, Distribution or Sale of Tobacco Products and Inhalant Delivery System
GBL.....	Personnel Records
GBM	Staff Complaints
GBMA	Whistleblower

PROPOSED ACTION: Move to approve the SOESD board policies presented in second reading.

- B. 2023-2024 Chamber Membership
Chamber memberships will be coming due for 2023-2024. Administration recommends renewal of chamber memberships in SOESD’s three-county service area.
PROPOSED ACTION: Move to approve the renewal of chamber memberships for fiscal year 2023-2024.
- C. Regional Advisory Council Appointment – Board Member Representation
Member Morell is currently appointed to the Regional Inclusive Services Advisory Council, but has a conflict with the time of the meetings, so suggests another board member be considered for appointment. It is required that an ESD or local school board member hold a seat on the RAC. The Council meets three times a year to discuss matters related to Special Education Regional Inclusive Services (RIS). Please let Chair Converse or the Board Secretary know in advance of the board meeting if you are interested in serving on the council. ([Page 23](#))
PROPOSED ACTION: Move to appoint _____ to serve as the Board’s representative on the Regional Advisory Council.
- D. 2022-2023 SOESD Resolution #9: OAESD Support Network for 2023-2026
Superintendent Beveridge recommends the Board show its continued support for the Oregon ESD Support Network by passing this resolution. The Network has resulted in a coordinated and integrated approach by ESDs across the state to support school districts in statewide implementation of targeted initiatives that benefit students, families, and our communities. ([Page 24](#))
PROPOSED ACTION: Move to approve 2022-2023 SOESD Resolution #9.
- E. Budget and Legislative Update
Superintendent Beveridge will provide an update on budget and legislative activity impacting education.
- F. Phoenix Campus Reconstruction Update
Superintendent Beveridge and CFO Weaver will provide an update on the Phoenix Campus Reconstruction Project. The monthly report for March 2023 is included as a separate email attachment.

G. Strategic Planning Update

Superintendent Beveridge will provide an update on strategic planning.

5. Business Services

2022-2023 SOESD Resolution #10: Adopt and Appropriate

Resolution #10 adopts and appropriates state funds for the 2022-2023 fiscal year. CFO Weaver will provide further explanation and answer your questions during the meeting. ([Page 25](#))

PROPOSED MOTION: Move to approve 2022-2023 SOESD Resolution #10.

6. Miscellaneous

A. SOESD Budget Committee Meeting, May 10, 2023, 6:00 PM

B. Next Regular Meeting: May 17, 2023, 6:00 PM

C. OAESD Spring Conference, May 11-12, 2023, Sunriver Resort

7. Adjournment

Minutes in Brief SOUTHERN OREGON EDUCATION SERVICE DISTRICT
BOARD OF DIRECTORS SPECIAL MEETING
WEDNESDAY, MARCH 15, 2023

Call to Order A work session of the Southern Oregon Education Service District Board of Directors was held in the downstairs conference room at the SOESD administration office in Medford, Oregon, and by video conference on Wednesday, March 15, 2023 at 5:00 PM.

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

SOESD staff members and guests in attendance:
Jessica Bach, Scott Beveridge, Rick Stucky, Dan Weaver

SOESD Board Policy Rewrite Rick Stucky, OSBA Policy Specialist, led the board through a review of the following draft policies.

- A. Review of Proposed Policies Section E: Support Services
 - EEACD Use of ESD Activity Vehicles for Student Transportation
 - EEBB Use of Private Vehicles for ESD Business
 - EHA Health Insurance Portability and Accountability Act

- B. Review of Proposed Policies Section G: Personnel
 - GAB Job Descriptions
 - GBA Equal Employment Opportunity
 - GBC Staff Ethics
 - GBCA Staff Dress and Grooming
 - GBD Board-Staff Communication
 - GBDA Expression of Milk in the Workplace
 - GBE Staff Health and Safety
 - GBEA Workplace Harassment
 - GBEB Communicable Disease – Staff
 - GBEC Drug-Free Workplace
 - GBK Prohibited Use, Distribution or Sale of Tobacco Products and Inhalant Delivery System
 - GBL Personnel Records
 - GBM Staff Complaints
 - GBMA Whistleblower

Adjournment The work session adjourned at 5:35 PM.

Minutes in Brief SOUTHERN OREGON EDUCATION SERVICE DISTRICT
BOARD OF DIRECTORS REGULAR MEETING
WEDNESDAY, MARCH 15, 2023

Call to Order A regular meeting of the Southern Oregon Education Service District Board of Directors was held on Wednesday, March 15, 2023 at the SOESD’s administration office in Medford, Oregon. Vice-Chair Wright called the meeting to order at 6:06 PM, read the SOESD land acknowledgement, and led those in attendance in the Pledge of Allegiance.

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

SOESD staff members and guests in attendance:
Jessica Bach Mike Freeman, HMK Company
Scott Beveridge Brandon Reid, HMK Company
Susan Peck
Amy Szeliga
Dan Weaver

Comments from Representatives of the Associations Requests to Address Agenda Items Amy Szeliga, president of the licensed association, commented on positive discussions that are ongoing in labor-management meetings.
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: February 15, 2023 Regular Meeting
C. Personnel Report
D. Financial Report
IT WAS MOVED BY MEMBER MANNENBACH, SECONDED BY MEMBER MIDDLETON TO:
Approve the consent agenda as presented.
MOTION CARRIED: 7-0

Communications SOESD Superintendent’s Schedule of Meetings for March, April, and May 2023
Superintendent Beveridge reviewed his calendar of scheduled meetings for the months of March, April, and May 2023. Mr. Beveridge noted meetings in his calendar regarding CTE Programs of Study and Career Connected Learning, as well as continued discussions and presentations with the region’s special education directors and superintendents to provide a tiered behavioral support model, as requested by local districts.

Superintendent Beveridge reported that he and members of Cabinet continue to visit SOESD-operated classrooms and program meetings to build relationships with staff, learn about their work, and identify ways in which the leadership team can support them. Superintendent Beveridge’s schedule also includes strategic planning preparation, meetings regarding the SOESD Phoenix campus reconstruction, and meetings with CFO Weaver to develop the 2023-2024 proposed budget in preparation for the May 10, 2023 Budget Committee Meeting.

Administration

A. Phoenix Campus Reconstruction Project Contracts for Early Work Site Package Administration requested board approval to enter into contracts for early site work to commence on the Phoenix Campus Reconstruction Project. HMK project managers, Mike Freeman and Brandon Reid, were in attendance to provide details and answer the board’s questions about the recommendations for two contract awards. CFO Weaver explained that ODE wildfire grant dollars will be used to pay for the site work expenses, which are excluded from insurance funds.

1. HMK Company recommends awarding the Guaranteed Maximum Price (GMP) Amendment 1 for the Early Work Package to Adroit Construction Company in the amount of \$2,224,970.00. The original contract amount of \$75,000.00 was awarded to Adroit Construction Company in April 2022. This amendment for the Early Work Package will bring the total not-to-exceed contract sum to \$2,299,970.00.

IT WAS MOVED BY MEMBER MANNENBACH, SECONDED BY MEMBER POWELL TO:

Award the CM|GC GMP Amendment 1 for the Phoenix Campus Reconstruction Project to Adroit Construction Company for the additional not-to-exceed amount of \$2,224,970.00 bringing the total not-to-exceed contract sum to \$2,299,970.00.

MOTION CARRIED 7-0

2. HMK Company recommends awarding Western Testing, LLC, a contract not to exceed \$184,200.00 for construction materials engineering, testing, and special inspections related to the early work package for the Phoenix Campus Reconstruction Project.

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

Award Western Testing, LLC, a contract not to exceed \$184,200.00 for testing and inspection services.

MOTION CARRIES 7-0

B. First Reading of SOESD Board Policies

The policies listed below were reviewed by board members during the March 15, 2023 work session with Rick Stucky, OSBA Policy Specialist. These policies were presented for first reading.

First Reading: Proposed Policies Section E: Support Services

EEACD..... Use of ESD Activity Vehicles for Student
Transportation

EEBB Use of Private Vehicles for ESD Business

EHA..... Health Insurance Portability and Accountability Act

First Reading: Proposed Policies Section G: Personnel

- GAB Job Descriptions
- GBA Equal Employment Opportunity
- GBC..... Staff Ethics
- GBCA Staff Dress and Grooming
- GBD Board-Staff Communication
- GBDA..... Expression of Milk in the Workplace
- GBE..... Staff Health and Safety
- GBEA Workplace Harassment
- GBEB..... Communicable Disease – Staff
- GBEC..... Drug-Free Workplace
- GBK..... Prohibited Use, Distribution or Sale of Tobacco Products and Inhalant
- Delivery System
- GBL..... Personnel Records
- GBM Staff Complaints
- GBMA..... Whistleblower

C. Authority to Layoff/Reduce in Force

As a yearly proactive process, administration requested authority to layoff/reduce in force for fiscal year 2023-2024 should it become necessary. There are several reasons for this request, including district selections in the Choice & Equity model for delivery of Special Education Services, possible reductions within other ESD Local Service Plan programs, and funding shortfalls, should they occur. Superintendent Beveridge and Director Peck reported that no positions are currently identified for reductions for the 2023-2024 fiscal year.

IT WAS MOVED BY MEMBER MANNENBACH, SECONDED BY MEMBER POWELL TO:

Authorize administration to layoff/reduce in force for the fiscal year of 2023-2024.

MOTION CARRIED 7-0

D. Budget and Legislative Update

Superintendent Beveridge provided an update on budget and legislative activity impacting education. He noted that there are many new legislators in Salem, with over 3000 bills introduced, and about 600 of those related to education. The local superintendents are tracking about 30 education-related bills that could be of impact. Several bills, if passed, would add reporting requirements. Superintendent Beveridge is tracking Governor Kotek’s proposal on early literacy and discussions impacting Regional Inclusive Services (RIS). State funding for RIS has not kept pace for many years, and federal funds used to increase funding for RIS are set to expire.

Governor Kotek’s proposed budget for the 2023-2024 biennium recommends \$9.9 billion in State School Funds (SSF); data shows \$10.3 billion is needed to maintain current service levels. The Co-Chairs’ proposed budget from the Joint Ways and Means Committee is expected to be released in March. The Oregon Economic Revenue Forecast is due out on May 17, 2023. The upcoming release of the co-chairs’ proposed budget, economic forecast data, and other legislative outcomes will provide a clearer picture of anticipated revenue as CFO Weaver and Superintendent Beveridge develop SOESD’s

proposed budget for the 2023-2024 fiscal year. June 25, 2023 is the mandated end of the legislative session.

- E. Phoenix Campus Reconstruction Update
CFO Weaver provided an update on reconstruction of the SOESD's Phoenix Campus that was destroyed in the Almeda Fire on September 8, 2020. The monthly report for February 2023 was provided to board members in advance of the meeting. CFO Weaver reported that negotiations continue with PACE's insurance adjustor. Updated cost estimates may impact the overall project. Options include any combination of scaling the proposed building, increasing the loan amount, or using one-time funds. The Board will be kept apprised as the work to rebuild the campus continues moving forward.
- F. 2023-2024 SOESD Local Service Plan Update
Superintendent Beveridge reported the 2023-2024 SOESD Local Service Plan (LSP) has been approved. Votes in favor represent greater than two-thirds of the SOESD's component districts with a majority of the enrolled students, per ORS 334.175. Mr. Beveridge looks forward to reviewing LSP services and structure with component districts.
- G. Strategic Planning Update
Superintendent Beveridge provided an update on strategic planning and the process to choose a facilitator. Two finalists have been identified and a facilitator will be selected soon using a reference checking process. The strategic planning process will include activities to gather feedback from various constituents.

Business Services

2022-2023 SOESD Resolution #8: Adopt and Appropriate
CFO Weaver explained that resolution #8 adopts and appropriates federal and state funds for the 2022-2023 fiscal year.

IT WAS MOVED BY MEMBER MANNENBACH, SECONDED BY MEMBER POWELL TO:

Approve 2022-2023 SOESD Resolution #8.

MOTION CARRIED 7-0

Miscellaneous

- A. Next Work Session: April 19, 2023, 5:00 PM
- B. Next Regular Meeting: April 19, 2023, 6:00 PM
- C. SOESD Budget Committee Meeting, May 10, 2023, 6:00 PM
- D. OAESD Spring Conference, May 11-12, 2023, Sunriver Resort
- E. Special District Election – Important Dates
 - March 16, 2023: Last day for a candidate to file or withdraw
 - March 20, 2023: Voters' pamphlet filing deadline (Jackson County)
 - May 16, 2023: Special District Election

Adjournment

Vice-Chair Wright adjourned the meeting of the Southern Oregon ESD Board of Directors at 7:05 PM.

SOUTHERN OREGON EDUCATION SERVICE DISTRICT
 BOARD OF DIRECTORS FINANCIAL REPORT
 March 31, 2023

100	GENERAL FUND	BUDGET	EXPENDED	BALANCE	% SPT	REVENUE	% RECD
101	ADMIN/OPERATIONS	3,047,208.00	1,952,395.29	1,094,812.71	64.1%		
102	TECHNOLOGY MEDIA SERVICES	2,953,541.00	2,238,371.12	715,169.88	75.8%		
103	SPECIAL EDUC SERVICES	13,751,990.00	6,788,912.38	6,963,077.62	49.4%		
104	SPEECH	491,350.00	238,421.44	252,928.56	48.5%		
106	INTERPRETERS	1,186,343.00	1,025,376.44	160,966.56	86.4%		
107	PSYCHOLOGY	1,050,280.00	560,721.67	489,558.33	53.4%		
108	BRAILLIST	386,280.00	182,428.15	203,851.85	47.2%		
109	STEPS PLUS PROGRAM	1,800,000.00	901,952.34	898,047.66	50.1%		
110	OT / PT	418,550.00	371,419.01	47,130.99	88.7%		
113	REGIONAL/STATEWIDE INITIATIVES	397,946.00	242,560.99	155,385.01	61.0%		
114	CAREER/TECHNICAL ED	305,933.00	219,746.27	86,186.73	71.8%		
115	ENGLISH SECOND LANG	295,098.00	271,182.53	23,915.47	91.9%		
117	AUDIOLOGY	175,000.00	3,775.00	171,225.00	2.2%		
192	CARE	1,074,000.00	620,748.73	453,251.27	57.8%		
	TOTAL (100)	27,333,519.00	15,618,011.36	11,715,507.64	57.1%	25,337,066.90	92.7%
	March 31, 2022	25,889,265.00	14,453,083.95	11,436,181.05	55.8%	23,899,139.71	92.3%

BOARD ACCOUNTS - 2310		BUDGET	EXPENDED	BALANCE	% SPT
340-	BOARD TRAVEL	20,500.00	18,698.23	1,801.77	91.2%
351-	TELEPHONE	515.00	0.00	515.00	0.0%
381-	AUDIT	13,390.00	13,390.00	0.00	100.0%
382-	LEGAL SERVICES	70,835.00	68,420.90	2,414.10	96.6%
388-	ELECTIONS	10,000.00	0.00	10,000.00	0.0%
390-	OTHER SERVICES	0.00	0.00	0.00	0.0%
410-	SUPPLIES	2,796.00	2,198.75	597.25	78.6%
640-	DUES & FEES	28,500.00	22,776.75	5,723.25	79.9%
651-	LIABILITY INS	6,180.00	6,180.00	0.00	100.0%
	TOTAL BOARD ACCTS.	152,716.00	131,664.63	21,051.37	86.2%

210	SP REV -FEDERAL	BUDGET or AWARD EST	EXPENDED	BALANCE	% SPT	REVENUE	% RECD
0	SPECIAL REVENUE-FEDERAL	567,070.00	0.00	567,070.00	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	156,096.00	76,956.72	79,139.28	49.3%	34,326.22	22.0%
203	MIDDLE SCHOOL PILOT PROJECT	0.00	0.00	0.00	N/A	0.00	N/A
204	PERKINS BASIC 21-22	51,724.00	51,723.21	0.79	100.0%	51,723.21	100.0%
205	PERKINS BASIC 22-23	549,337.00	348,410.94	200,926.06	63.4%	337,505.81	61.4%
206	MIG SUMMER SCHL	569,882.00	569,881.22	0.78	100.0%	569,881.22	100.0%

208	TITLE 1C MIG RSY 22-23	1,771,135.00	764,093.59	1,007,041.41	43.1%	658,878.43	37.2%
209	TITLE 1C MIG RSY 21-22	1,109,984.00	657,253.20	452,730.80	59.2%	625,215.31	56.3%
210	TITLE 1C-PRESCHL 21-22	189,888.00	189,887.86	0.14	100.0%	189,887.86	100.0%
211	TITLE 1C PRESCHL 22-23	223,021.00	37,778.08	185,242.92	16.9%	32,369.48	14.5%
213	TITLE 1-C SUPPLEMENTAL 20-21	0.00	0.00	0.00	N/A	0.00	N/A
214	IDEA REGIONAL	2,748,179.00	2,082,431.60	665,747.40	75.8%	1,186,179.07	43.2%
215	ESD TECHNICAL ASSISTANCE	97,380.00	86,668.62	10,711.38	89.0%	57,904.00	59.5%
216	ELH SECTOR PLANNING 21-22	0.00	0.00	0.00	N/A	0.00	N/A
217	PP COORDINATED ENROLLMENT	59,500.00	6,054.36	53,445.64	N/A	0.00	N/A
218	INDIAN EDUCATION SERVICES	79,426.00	45,344.66	34,081.34	57.1%	0.00	0.0%
219	COVID-19 SUPPORT	1,332,043.00	67,943.72	1,264,099.28	5.1%	56,217.33	4.2%
220	ESDs For S E L	375,000.00	83,068.60	291,931.40	22.2%	71,633.16	19.1%
221	GEER	80,000.00	80,000.00	0.00	100.0%	80,000.00	100.0%
222	GEER - SSPS	143,287.00	0.00	143,287.00	0.0%	0.00	0.0%
223	COMPUTER SCIENCE - GEER	488,759.00	134,258.64	354,500.36	27.5%	0.00	0.0%
225	SOFRP	840,000.00	172,810.99	667,189.01	20.6%	0.00	0.0%
235	FAMILY SUPPORT SERVICES 21-23	15,448.00	16,825.87	(1,377.87)	108.9%	15,447.69	100.0%
236	EL HUB PDG (Parent Leadership)	30,000.00	27,561.58	2,438.42	91.9%	25,962.17	86.5%
237	PDG DISCRETIONARY	30,000.00	0.00	30,000.00	0.0%	0.00	0.0%
243	YOUTH TRANSITION PROGRAM	261,375.00	238,306.07	23,068.93	91.2%	152,945.77	58.5%
247	TITLE III CONSORTIUM 21-22	21,181.00	21,181.00	0.00	100.0%	21,181.00	100.0%
248	TITLE III CONSORTIUM 22-23	22,601.00	902.35	21,698.65	4.0%	5,102.08	22.6%
261	CHILD CARE RESOURCE NETWORK 21-23	639,098.00	504,790.05	134,307.95	79.0%	330,575.38	51.7%
262	FAMILY SUPPORT & CONNECTIONS	431,036.00	278,163.96	152,872.04	64.5%	294,759.60	68.4%
272	EI/ECSE	192,272.00	118,394.88	73,877.12	61.6%	96,135.52	50.0%
276	TRANSITION NETWORK COORDINATOR	172,700.00	0.00	172,700.00	0.0%	0.00	0.0%
277	TNF - STUDENT SUMMIT CONFERENCES	3,755.00	3,754.67	0.33	100.0%	3,754.67	100.0%
278	IDEA ENHANCEMENT 21-22	0.00	0.00	0.00	N/A	0.00	N/A
285	PERKINS RESERVE 21-22	11,197.00	11,185.87	11.13	99.9%	11,185.87	99.9%
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 22-23	330,029.00	92,711.54	237,317.46	28.1%	80,542.03	24.4%
292	IDEA ENHANCEMENT 22-23	0.00	0.00	0.00	N/A	0.00	N/A
297	EXTENDED ASSESSMENT 22-23	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 21-23	101,725.00	30,377.32	71,347.68	29.9%	1,655.48	1.6%
309	LTCT IDEA 21-23	23,228.00	0.00	23,228.00	0.0%	0.00	0.0%
310	CARL PERKINS TECH PREP	80,000.00	0.00	80,000.00	0.0%	0.00	0.0%
311	MIECHV	30,000.00	10,053.61	19,946.39	33.5%	10,053.61	33.5%

SUBTOTAL (210)	13,827,356.00	6,808,774.78	7,018,581.22	49.2%	5,001,021.97	36.2%
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	BUDGET or AWARD EST	EXPENDED	BALANCE	% SPT	REVENUE	% RECD	
210 SP REV -FEDERAL							
SUBTOTAL (210)	13,827,356.00	6,808,774.78	7,018,581.22	49.2%	5,001,021.97	36.2%	
312	LTCT ESSER III	270,000.00	0.00	270,000.00	0.0%	0.00	0.0%
313	OCDD	45,000.00	26,816.13	18,183.87	59.6%	16,949.78	37.7%
316	MTSS REGIONAL COACHES	57,493.00	57,492.49	0.51	100.0%	57,492.49	100.0%
318	HS MATH PATHWAY CONVENING	0.00	0.00	0.00	N/A	0.00	N/A
319	ESSER A3	1,018,500.00	334,883.84	683,616.16	32.9%	276,909.85	27.2%

TOTAL (210)	15,218,349.00	7,227,967.24	7,990,381.76	47.5%	5,352,374.09	35.2%
March 31, 2022	10,403,807.00	6,209,448.23	4,194,358.77	59.7%	4,708,738.33	45.3%

		BUDGET or AWARD EST	EXPENDED	BALANCE	% SPT	REVENUE	% RECD
290	SP REV -OTHER						
0	SPECIAL REVENUE-OTHER	593,100.00	0.00	593,100.00	0.0%	0.00	0.0%
717	PP COORDINATED ENROLLMENT	391,999.00	138,769.42	253,229.58	35.4%	86,616.31	22.1%
718	GYO GRANT	475,022.00	267,231.21	207,790.79	56.3%	256,212.97	53.9%
719	COVID-19 SUPPORT	72,874.00	0.00	72,874.00	0.0%	0.00	0.0%
749	EDUCATOR ADVANCEMENT FUND	2,152,994.00	786,178.74	1,366,815.26	36.5%	395,167.06	18.4%
751	ADV MATH IN REAL LIFE	0.00	0.00	0.00	N/A	0.00	N/A
753	ADV STEM INNOVATIVE 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	59,580.00	5,614.08	53,965.92	9.4%	59,580.00	100.0%
757	LONG TERM CARE TREATMENT	1,674,457.00	523,836.83	1,150,620.17	31.3%	288,281.83	17.2%
758	WESD DASHBOARD	125,000.00	0.00	125,000.00	0.0%	0.00	0.0%
759	FCCN	27,401.00	3,688.40	23,712.60	13.5%	3,688.40	13.5%
760	CPDP	6,567.00	0.00	6,567.00	0.0%	6,566.43	100.0%
761	CCRN SUPPORT	4,597.00	0.00	4,597.00	0.0%	7,983.12	173.7%
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
764	REENGAGEMENT COLLABORATIVE	120,000.00	0.00	120,000.00	0.0%	0.00	0.0%
765	SUPPORT - CTE CAREER PATHWAYS	28,700.00	8,808.99	19,891.01	30.7%	0.00	0.0%
766	SCHOOL READINESS HUB	0.00	0.00	0.00	N/A	0.00	N/A
767	SHA FAMILY SERVICES HUB	152,831.00	71,831.35	80,999.65	47.0%	46,843.94	30.7%
768	EMERGING REGIONAL STEM HUB	409,921.00	234,055.39	175,865.61	57.1%	211,108.01	51.5%
769	REGIONAL EDUCATOR NETWORK (SOREN)	475,218.00	198,641.75	276,576.25	41.8%	128,872.64	27.1%
770	LTCT ADDITIONAL SERVICES	4,206.00	0.00	4,206.00	0.0%	4,205.82	100.0%
772	STEM INNOVATIVE PROGRAMMING 21-23	40.00	0.00	40.00	0.0%	0.00	0.0%
773	PRESCHOOL PROMISE	0.00	0.00	0.00	N/A	0.00	N/A
774	PRESCHOOL PROMISE - COORDINATION	141,670.00	5,008.06	136,661.94	3.5%	141,669.31	100.0%
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
SUBTOTAL-290		6,916,177.00	2,243,664.22	4,672,512.78	32.4%	1,636,795.84	23.7%
		BUDGET or AWARD EST	EXPENDED	BALANCE	% SPT	REVENUE	% RECD
290	SP.REV.-OTHER						
SUBTOTAL-290		6,916,177.00	2,243,664.22	4,672,512.78	32.4%	1,636,795.84	23.7%
778	THREAT ASSESSMENT PROGRAM	75,000.00	38,013.73	36,986.27	50.7%	9,014.08	12.0%
779	CCR&R PRESCHOOL PROMISE SSA	0.00	0.00	0.00	N/A	0.00	N/A

780	CCRR SSA PROFESSIONAL LEARNING	197,999.00	390.38	197,608.62	0.2%	390.38	0.2%
781	CCRR SSA PSP ADMIN	205,399.00	96,703.45	108,695.55	47.1%	60,951.72	29.7%
782	CCRR SSA PSP COACHING SHARED SERVICES - SSA BUSINESS	226,243.00	101,049.49	125,193.51	44.7%	66,068.86	29.2%
783	COACHING	231,890.00	51,103.03	180,786.97	22.0%	33,299.41	14.4%
802	CLASSROOM AT CRATER LAKE	374.00	373.99	0.01	100.0%	373.99	100.0%
804	ODE INTEL	3,387.00	3,386.74	0.26	100.0%	3,386.74	100.0%
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	25,000.00	0.00	25,000.00	0.0%	17,299.69	69.2%
808	LEAD LEARN EXCEL	5,452.00	5,451.99	0.01	100.0%	5,451.99	100.0%
809	AMBITIOUS INSTRUCTION	0.00	0.00	0.00	N/A	0.00	N/A
810	SOTCE	15,000.00	0.00	15,000.00	0.0%	32,500.00	216.7%
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	69.00	0.00	69.00	0.0%	68.29	99.0%
816	STUDENT SUCCESS ACT	2,739,776.00	1,273,462.51	1,466,313.49	46.5%	2,266,986.48	82.7%
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	2,785.00	0.00	2,785.00	0.0%	2,784.62	100.0%
822	GILBERT CREEK PLAYGROUND	158.00	0.00	158.00	0.0%	157.94	100.0%
823	ATTENDANCE DONATION ACCOUNT	50.00	0.00	50.00	0.0%	49.89	99.8%
824	ROLLOVER FUNDS	0.00	0.00	0.00	N/A	0.00	N/A
825	STATE - R A C	210,000.00	181,376.64	28,623.36	86.4%	59,631.54	28.4%
828	TARGET GRANT	0.00	0.00	0.00	N/A	0.00	N/A
829	MIGRANT/ELL WORKSHOP	50,000.00	2,074.31	47,925.69	4.1%	2,402.42	4.8%
830	FOCUSED NETWORK FUNDING	0.00	0.00	0.00	N/A	0.00	N/A
831	CTE WORKSHOP ACCOUNT	5,000.00	0.00	5,000.00	0.0%	3,884.71	77.7%
836	INDIAN ED DONATION ACCOUNT	22,000.00	0.00	22,000.00	0.0%	21,783.94	99.0%
838	TAPESTRY GRANT	72.00	0.00	72.00	0.0%	71.96	99.9%
839	CC4A PROGRAM SUPPORT	25,159.00	24,859.57	299.43	98.8%	24,748.87	98.4%
840	SOBAASS	380,693.00	342,909.37	37,783.63	90.1%	217,794.15	57.2%
841	TRUANCY GRANT	286.00	0.00	286.00	0.0%	285.30	99.8%
SUBTOTAL-290		11,337,969.00	4,364,819.42	6,973,149.58	38.5%	4,466,182.81	39.4%
		BUDGET or			%		%
290 SP.REV.-OTHER		EST	EXPENDED	BALANCE	SPT	REVENUE	RECD
SUBTOTAL-290		11,337,969.00	4,364,819.42	6,973,149.58	38.5%	4,466,182.81	39.4%
842	FORD FAMILY FOUNDATION	25,000.00	25,000.00	0.00	100.0%	25,000.00	100.0%
843	STEM INNOVATION	210,853.00	37,747.40	173,105.60	17.9%	36,006.03	17.1%

845	SUPERINTENDENT ASSOC LUNCHE	154.00	0.00	154.00	0.0%	153.09	99.4%
846	NAV SUCCESSFUL ED - STUDENTS AND FAM	125,000.00	0.00	125,000.00	0.0%	0.00	0.0%
847	TRIBAL HISTORY SHARED HISTORY PD	100,000.00	20,500.00	79,500.00	20.5%	0.00	0.0%
849	OEA WELLNESS - MENTORING	0.00	0.00	0.00	N/A	0.00	N/A
850	WELLNESS GRANT	6,878.00	58.00	6,820.00	0.8%	6,877.63	100.0%
852	ZELZIE REED TRUST	15,370.00	0.00	15,370.00	0.0%	15,369.96	100.0%
853	MENTORING TEACHER 21-22	334,500.00	252,483.29	82,016.71	75.5%	91,247.35	27.3%
854	GRAY FAMILY FUND	955.00	0.00	955.00	0.0%	955.00	100.0%
855	MIGRANT DONATIONS	3,729.00	0.00	3,729.00	0.0%	3,728.44	100.0%
857	SPEC ED WORKSHOP ACCT	100,000.00	86,917.10	13,082.90	86.9%	91,990.85	92.0%
858	MEDIA LIBRARY REPLACE MATERIALS	15,000.00	12,250.00	2,750.00	81.7%	15,484.17	103.2%
859	ED TECH SUMMIT	30,000.00	3,978.15	26,021.85	0.13	28,381.41	0.95
860	CLIMATE CHANGE EDUC-CLASS AT CL	328.00	0.00	328.00	0.0%	327.64	99.9%
865	REGIONAL PROMISE	0.00	0.00	0.00	N/A	0.00	N/A
866	KINDERMUSIK	9,454.00	0.00	9,454.00	0.0%	9,453.10	100.0%
867	COW CREEK FOUNDATION	5,980.00	0.00	5,980.00	0.0%	5,980.00	100.0%
868	PLUM CREEK FOUNDATION	0.00	0.00	0.00	N/A	0.00	N/A
869	FOURWAY FOUNDATION	15,349.00	0.00	15,349.00	0.0%	15,348.65	100.0%
870	LICC	5,200.00	0.00	5,200.00	0.0%	5,118.27	98.4%
872	EI/ECSE	2,797,067.00	1,444,807.34	1,352,259.66	51.7%	848,358.10	30.3%
873	PROGRAM SUPPORT EI/ECSE	437,000.00	318,507.20	118,492.80	72.9%	903,783.90	206.8%
874	PRESCHOOL PROMISE - STARTUP	0.00	0.00	0.00	N/A	0.00	N/A
876	TRANSITION NETWORK FACILITATOR	172,700.00	120,733.78	51,966.22	69.9%	80,242.58	46.5%
881	EDUCATIONAL INSTRUCTION	0.00	0.00	0.00	N/A	0.00	N/A
882	EARLY LEARNING HUB	661,787.00	506,855.23	154,931.77	76.6%	1,052,987.79	159.1%
887	TNF STUDENT SUMMITS	8,039.00	8,039.00	0.00	100.0%	8,039.00	100.0%
888	CTE - EQUIPMENT REIMBURSEMENT	141,976.00	299.50	141,676.50	0.2%	141,975.08	100.0%
889	ADV REGIONAL STEM HUB	0.00	0.00	0.00	N/A	0.00	N/A
900	MATHWASY - RPD	250,000.00	16,331.97	233,668.03	6.5%	16,287.42	6.5%
901	SOESD PROGRAM SUPPORT	500,000.00	118,903.47	381,096.53	23.8%	1,483,558.14	296.7%
902	HB4030-2	257,250.00	0.00	257,250.00	0.0%	0.00	0.0%
904	RETIRE/SABATICAL	600,000.00	100,397.87	499,602.13	16.7%	1,521,866.27	253.6%
905	FMLA	63,124.00	0.00	63,124.00	0.0%	63,123.97	100.0%
906	HB4030	342,157.00	342,156.27	0.73	100.0%	290,832.83	85.0%
910	SUMMER SP-ED SERVICES	35,600.00	36,734.87	(1,134.87)	103.2%	25,903.98	72.8%

SUBTOTAL-290	18,608,419.00	7,817,519.86	10,790,899.14	42.0%	11,254,563.46	60.5%
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	BUDGET or AWARD EST	EXPENDED	BALANCE	% SPT	REVENUE	% RECD
290 SP.REV.-OTHER						

SUBTOTAL-290	18,608,419.00	7,817,519.86	10,790,899.14	42.0%	11,254,563.46	60.5%
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912	SPECIAL PROJECTS	354.00	0.00	354.00	0.0%	353.98	100.0%
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913	WRITING ASSESSMENT	4,437.00	0.00	4,437.00	0.0%	4,436.05	100.0%
915	REGIONAL-LOCAL CONTRACTS	753,142.00	450,231.75	302,910.25	59.8%	1,109.20	0.1%
916	STATE REGIONAL	2,451,947.00	1,426,884.03	1,025,062.97	58.2%	726,053.30	29.6%
918	K PARTNERSHIP INNOVATION	465,708.00	260,583.01	205,124.99	56.0%	157,217.06	33.8%
920	R & B DONATIONS (Rice & Beans)	500.00	0.00	500.00	0.0%	192.63	38.5%
921	MEYER MEMORIAL	72,295.00	52,568.07	19,726.93	72.7%	72,294.92	100.0%
924	SOU TECHNOLOGY	1,947.00	0.00	1,947.00	0.0%	1,946.35	100.0%
926	AUTISM - PARENT PARTNER	20,000.00	2,320.35	17,679.65	11.6%	16,434.83	82.2%
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	9,900.00	0.00	9,900.00	0.0%	9,515.32	96.1%
932	KLAMATH TECH	1,750.00	0.00	1,750.00	0.0%	1,749.66	100.0%
935	STAFF CONTRACTS	123,000.00	90,367.63	32,632.37	73.5%	81,390.12	66.2%
938	GARDEN PROJECT GRANT	25.00	0.00	25.00	0.0%	24.50	98.0%
940	CESD - SOBAASS	93,016.00	93,016.00	0.00	100.0%	93,016.00	100.0%
941	READING GRANT	2,325.00	0.00	2,325.00	0.0%	2,324.09	100.0%
942	FOLLETTE CONTRACT	50,000.00	2,729.09	47,270.91	5.5%	26,606.81	53.2%
943	YTP PROGRAM	275,388.00	51,382.83	224,005.17	18.7%	32,951.59	12.0%
945	ESD WORKSHOP	25,000.00	4,380.00	20,620.00	17.5%	20,499.95	82.0%
946	AURAL IMPRESSION	25,000.00	0.00	25,000.00	0.0%	199,826.08	799.3%
947	CURRICULUM WORKSHOP	6,325.00	4,779.40	1,545.60	75.6%	6,324.89	100.0%
948	WEB PD	14,000.00	0.00	14,000.00	0.0%	2,838.20	20.3%
949	BVIS FUNDING	17,511.00	0.00	17,511.00	0.0%	17,510.60	100.0%
951	EMPLOYEE PAID MEDICAL	0.00	0.00	0.00	N/A	0.00	N/A
952	INSURANCE RESERVE	23,700.00	0.00	23,700.00	0.0%	23,693.04	100.0%
953	FINGERPRINTING	33,644.00	0.00	33,644.00	0.0%	33,643.57	100.0%
955	INFRASTRUCTURE-SOESD	1,092,174.00	77,561.92	1,014,612.08	7.1%	1,342,173.02	122.9%
957	OR PROJECT	325,000.00	14,764.45	310,235.55	4.5%	315,695.53	97.1%
960	COOP PURCHASING	800,000.00	473,785.85	326,214.15	59.2%	651,597.25	81.4%
961	COOP PURCHASING SUPPORT	105,000.00	43,992.12	61,007.88	41.9%	1,132.02	1.1%
964	EMPLOYEE SERVICES	1,500.00	613.95	886.05	40.9%	1,142.50	76.2%
965	MIG PROGRAM SUPPORT	5,000.00	3,602.82	1,397.18	72.1%	2,345.17	46.9%
966	PDHH DONATIONS	2,810.00	0.00	2,810.00	0.0%	2,810.00	100.0%
967	BRAIN BOWL	6,011.00	0.00	6,011.00	0.0%	6,010.10	100.0%
972	PVI DONATIONS	3,889.00	0.00	3,889.00	0.0%	3,888.17	100.0%

SUBTOTAL-290	25,420,717.00	10,871,083.13	14,549,633.87	42.8%	15,113,309.96	59.5%
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	BUDGET or AWARD EST	EXPENDED	BALANCE	% SPT	REVENUE	% RECD
290 SP.REV.-OTHER						

SUBTOTAL-290	25,420,717.00	10,871,083.13	14,549,633.87	42.8%	15,113,309.96	59.5%
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974	SHARED READING PROGRAM	118.00	0.00	118.00	0.0%	117.22	99.3%
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976	TELECONFERENCING	7,119.00	0.00	7,119.00	0.0%	7,118.48	100.0%
978	SCHOOL IMPROVEMENT WORKSHOPS	129,039.00	500.81	128,538.19	0.4%	129,238.94	100.2%
982	READING RED	814.00	0.00	814.00	0.0%	813.96	100.0%
983	OREGON ONLINE	38,574.00	0.00	38,574.00	0.0%	38,573.67	100.0%
989	ADV CTE REVITALIZATION	0.00	0.00	0.00	N/A	0.00	N/A
990	MEDICAID ADMN CLAIMING	1,200,000.00	205,098.70	994,901.30	17.1%	154,886.75	12.9%
991	MAC DISTRICTS	600,000.00	30,838.16	569,161.84	5.1%	10,457.87	1.7%
996	OREGON COMMUNITY FOUNDATION	177,413.00	87,184.02	90,228.98	49.1%	177,412.59	100.0%
998	COMPUTER REPLACEMENT	0.00	0.00	0.00	N/A	0.00	N/A
999	INDIRECT COST POOL	800,000.00	759,880.81	40,119.19	95.0%	2,562,027.58	320.3%

TOTAL (290)	28,373,794.00	11,954,585.63	16,419,208.37	42.1%	18,193,957.02	64.1%
March 31, 2022	26,153,050.00	10,066,253.52	16,086,796.48	38.5%	14,799,788.08	56.6%

				%		%	
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	703,442.65	8,296,557.35	7.8%	5,653,889.12	62.8%
TOTAL (400)		9,000,000.00	703,442.65	8,296,557.35	7.8%	5,653,889.12	62.8%
March 31, 2022		1,675,000.00	271,342.61	1,403,657.39	16.2%	4,000,000.00	238.8%

				%		%	
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	2,021,432.95	2,061,697.05	49.5%	1,473,768.48	36.1%
655	WORKER'S COMP/MEDICAL	1,092,169.00	671,421.63	420,747.37	61.5%	1,765,950.24	161.7%
662	SB1049 - PERS	230,000.00	3,429.08	226,570.92	1.5%	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%	44,706.96	55.6%
695	D P B	75,000.00	0.00	75,000.00	0.0%	0.00	0.0%
696	UNEMPLOYMENT ACCT	245,203.00	48,565.57	196,637.43	19.8%	602,226.15	245.6%
697	COPIES / FAX USAGE	146,546.00	43,356.04	103,189.96	29.6%	146,140.29	99.7%
TOTAL (600)		6,212,283.00	2,788,205.27	3,424,077.73	44.9%	4,210,530.53	67.8%
March 31, 2022		7,753,592.00	2,119,163.32	5,634,428.68	27.3%	3,652,255.30	47.1%

				%		%	
RECAP BY FUND		BUDGET or AWARD EST	EXPENDED	BALANCE	SPT	REVENUE	RECD

100	GENERAL FUND	27,333,519.00	15,618,011.36	11,715,507.64	57.1%	25,337,066.90	92.7%
210	SP REV - FEDERAL	15,218,349.00	7,227,967.24	7,018,581.22	47.5%	5,352,374.09	35.2%
290	SP REV - OTHER	28,373,794.00	11,954,585.63	16,419,208.37	42.1%	18,193,957.02	64.1%

400	CAPITAL PROJECTS FUND	9,000,000.00	703,442.65	8,296,557.35	7.8%	5,653,889.12	62.8%
600	INTERNAL SERVICE	6,212,283.00	2,788,205.27	3,424,077.73	44.9%	4,210,530.53	67.8%
TOTAL ALL FUNDS		<u>86,137,945.00</u>	<u>38,292,212.15</u>	<u>46,873,932.31</u>	<u>44.5%</u>	<u>58,747,817.66</u>	<u>68.2%</u>
March 31, 2022		<u>71,874,714.00</u>	<u>33,119,291.63</u>	<u>38,755,422.37</u>	<u>46.1%</u>	<u>51,059,921.42</u>	<u>71.0%</u>
FUND BAL - 3/31/2023		<u>20,455,605.51</u>					
FUND BAL - 3/31/2022		<u>17,940,629.79</u>					

SOESD Superintendent's Meeting Schedule
April, May, and June 2023

April 2023

- 3 SOESD Cabinet Meeting with Klamath Falls City Schools Administrative Cabinet
SOESD Cabinet Visit with Staff at SOESD Klamath Falls Office
SOESD Cabinet Meeting with Pinehurst Schools District Administration
- 4 Conference Call with Southern Oregon Legislators and K-12 Superintendents
Cabinet Meeting
Phoenix Campus Reconstruction Project Meeting: Furniture Selection Review
OAESD Coordination with Superintendent Paul Andrews, High Desert ESD
Indian Education Culture Night
- 5 SOESD Education Association Labor-Management Meeting
Charlie Bauer, Coordinator, and Teresa Cisneros, SOESD Indian Education Facilitator
OR Project Planning with Dale Balme, Special Education Coordinator; Coree Kelly, CIO; Susan Peck, Special Education Director, and Dan Weaver, CFO
- 6 Program Planning with Daniel Weaver, Chief Financial Officer
Budget Development with Daniel Weaver, Chief Financial Officer
Audiology Services Planning with Dale Balme, Special Education Coordinator; Susan Peck, Special Education Coordinator; and Dan Weaver, CFO
- 7 OASE Legislative Updates/COSA Policy and Advocacy Team
Board Policy Rewrite Project with Jessica Bach, Board Secretary; Patty Michiels, Chief HR Officer; and Rick Stucky, OSBA Policy Specialist
Vance Durrington, Director of SOU's Division of Education, Health, and Leadership
Program Planning with Mark Angle-Hobson, School Improvement Services Director
Phoenix Campus Construction Project: Insurance Review with Daniel Weaver, Chief Financial Officer
OAESD Program Cabinet Literary Framework Engagement
- 10 SOESD Cabinet Meeting with Three Rivers School District Senior Leadership Team
Program Planning with Susan Peck, Special Education Director
Budget Development with Daniel Weaver, Chief Financial Officer
OR Project Planning Discussion with Dale Balme, Special Education Coordinator; Coree Kelly, CIO; Dan Weaver, CFO; and Tyler York, Teacher of Visually Impaired
Superintendent Bret Champion, Medford School District
Grow Your Own (GYO) Project Briefing with Aaron Cooke, Program Manager, and Mark Angle-Hobson, School Improvement Services Director
- 11 SOESD Cabinet Meeting with Rogue River School District Administrative Cabinet
Program Planning with Peter Buckley, Southern Oregon Success (SORS) Program Manager
Equity-Focused Strategic Planning Preparation with COSA Consultants, Sustainable Leadership Consultants, and SOESD Administrators
COSA Meeting with Oregon Superintendents and ODE Deputy Superintendent Colt Gill
Program Planning with Charlie Bauer, Coordinator of Indian Education
- 12 SOESD Education Association Labor-Management Meeting
SOESD Cabinet Meeting with Grants Pass School District Senior Leadership Team
CIO Interview
Strategic Planning Coordination with John Bowling, Sustainable Leadership Consultants
- 13 Strategic Planning Preparation with Dale Balme, Special Education Coordinator; Diane Dunas, Special Education Coordinator; and Susan Peck, Special Education Director
SOESD Cabinet Meeting with Central Point School District Senior Leadership Team (Rescheduling)

- Program Planning with Patty Michiels, Chief Human Resources Officer
- Program Planning with Mark Angle-Hobson, School Improvement Services Director
- Strategic Planning Coordination with John Bowling, Sustainable Leadership Consultants
- Budget Development with Daniel Weaver, Chief Financial Officer
- Phoenix Campus Reconstruction Project Meeting with arkitek, HMK Company, and SOESD Core Team
- 14 OASE Legislative Updates/COSA Policy and Advocacy Team
- Tribal History/Shared History
- Cabinet Meeting
- OAESD Planning with Jessica Brendan, OAESD Program Administrator
- 17 Phoenix Campus Construction Project: Insurance Review with Daniel Weaver, Chief Financial Officer
- Program Planning with Susan Peck, Special Education Director
- Southern Oregon Superintendents Meeting
- Grow Your Own (GYO) Project Planning with Aaron Cooke, Program Manager and Mark Angle-Hobson, School Improvement Director
- 18 Conference Call with Southern Oregon Legislators and K-12 Superintendents
- Cabinet Meeting with Phoenix-Talent School's Administrative Cabinet
- Program Planning with Coree Kelly, Chief Information Officer
- Cabinet's Visit During Program for Orthopedically Impaired Staff Meeting
- 19 Special Education Management Team Meeting
- SOESD Board of Directors Regular Meeting
- CIO Interview (TBD)
- 20 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
- Southern Oregon Early Learning Services Hub Partner Recognition Dinner
- 21 OASE Legislative Updates/COSA Policy and Advocacy Team
- OASE Executive Committee
- Business Office Lunch and Learn: State School Fund (SSF)
- Budget Development with Daniel Weaver, Chief Financial Officer
- 24 Cabinet's Visit with Southern Oregon Early Learning Services (SOELS) Staff
- Budget Development with Daniel Weaver, Chief Financial Officer
- 25 Cabinet Meeting with Klamath County School District's Administrative Cabinet
- Program Planning with Coree Kelly, Chief Information Officer
- OAESD/ODE Program Cabinet Meeting
- 26 Budget Development with Daniel Weaver, Chief Financial Officer
- Administrative Team Meeting
- 27 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
- Careers in Gear
- 28 OASE Legislative Updates/COSA Policy and Advocacy Team
- Rogue Workforce Partnership Quarterly Workforce Board Meeting

May 2023

- 1 Cabinet Meeting with Ashland School District's Administrative Cabinet
- Program Planning with Susan Peck, Special Education Director
- Budget Development with Daniel Weaver, Chief Financial Officer
- 2 Conference Call with Southern Oregon Legislators and K-12 Superintendents
- Cabinet Meeting

- Program Planning with Coree Kelly, Chief Information Officer
- Budget Development with Daniel Weaver, Chief Financial Officer
- 3 SOESD Education Association Labor-Management Meeting
- Cabinet Meetings with Classrooms and Staff (TBD)
- Superintendent Paul Andrews, High Desert ESD
- Budget Development with Daniel Weaver, Chief Financial Officer
- Strategic Planning with Administrative Team
- 4 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
- Budget Development with Daniel Weaver, Chief Financial Officer
- 5 OASE Legislative Updates/COSA Policy and Advocacy Team
- Budget Development with Daniel Weaver, Chief Financial Officer
- 8 Program Planning with Susan Peck, Special Education Director
- Diversity, Equity, and Inclusion Planning with Charlie Bauer, Migrant Ed/ELL/Indian Education/
SOBAASS Coordinator, and Patty Michiels, Chief Human Resources Officer
- Budget Presentation Review with Daniel Weaver, Chief Financial Officer
- 9 Cabinet Meeting
- Program Planning with Peter Buckley, Southern Oregon Success (SORS) Program Manager
- COSA Meeting with Oregon Superintendents and ODE Deputy Superintendent Colt Gill
- Budget Presentation Review with Daniel Weaver, Chief Financial Officer
- 10 SOESD Budget Committee Meeting
- 10-12 OAESD Spring Conference
- 12 OASE Legislative Updates/COSA Policy and Advocacy Team
- 15 Regional Advisory Council Meeting
- Southern Oregon Superintendents Meeting
- 16 Conference Call with Southern Oregon Legislators and K-12 Superintendents
- Cabinet Meeting
- Howard STEPS CARE Classroom Field Day
- Program Planning with Coree Kelly, Chief Information Officer
- Southern Oregon Early Learning Services (SOELS) Governance Council Meeting
- 17 Special Education Management Team Meeting
- SOESD Board of Directors Regular Meeting
- 18 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
- Strategic Planning with Administrative Team
- 19 Tentative – Field trip to Wildlife Images with Program for Visually Impaired Staff and Students
- 22 Program Planning with Susan Peck, Special Education Director
- 23 Cabinet Meeting
- Crater CARE Field Day (AM)
- Program Planning with Coree Kelly, Chief Information Officer
- Crater CARE Field Day (PM)
- 24 OAESD/ODE Program Cabinet Meeting
- Administrative Team Meeting
- 25 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

- 26 OASE Legislative Updates/COSA Policy and Advocacy Team
- 30 Cabinet Meeting
Program Planning with Coree Kelly, Chief Information Officer
- 31 Cabinet Meetings with Classrooms and Staff (TBD)

June 2023

- 1 OAESD Superintendent Council Meeting
- 2 OASE Legislative Updates/COSA Policy and Advocacy Team
- 5 Program Planning with Susan Peck, Special Education Director
- 6 Conference Call with Southern Oregon Legislators and K-12 Superintendents
Cabinet Meeting with Medford School District’s Administrative Cabinet
Program Planning with Coree Kelly, Chief Information Officer
- 7 SOESD Education Association Labor-Management Meeting
Strategic Planning with Administrative Team
- 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
- 9 OASE Legislative Updates/COSA Policy and Advocacy Team
OAESD Planning with Jessica Brendan, OAESD Program Administrator
- 12 Program Planning with Susan Peck, Special Education Director
Diversity, Equity, and Inclusion Planning with Charlie Bauer, Migrant Ed/ELL/Indian Education/
SOBAASS Coordinator, and Patty Michiels, Chief Human Resources Officer
- 13 Cabinet Meeting
Program Planning with Peter Buckley, Southern Oregon Success (SORS) Program Manager
Strategic Planning with Administrative Team
COSA Meeting with Oregon Superintendents and ODE Deputy Superintendent Colt Gill
- 14 Cabinet Meetings with Classrooms and Staff (TBD)
- 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
- 16 OASE Legislative Updates/COSA Policy and Advocacy Team
OASE Executive Committee
- 19 Program Planning with Susan Peck, Special Education Director
Southern Oregon Superintendents Meeting
- 20 Conference Call with Southern Oregon Legislators and K-12 Superintendents
Cabinet Meeting
Program Planning with Coree Kelly, Chief Information Officer
- 21 Medford School District Command Response Drill
Special Education Management Team Meeting
SOESD Board of Directors Regular 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
- 23 OASE Legislative Updates/COSA Policy and Advocacy Team/Constitutional Sine Die (End Leg. Session)
- 26 Program Planning with Susan Peck, Special Education Director
- 27 Cabinet Meeting
Program Planning with Coree Kelly, Chief Information Officer
- 28 Strategic Planning with Administrative Team

- 29 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

REGIONAL ADVISORY COUNCIL

(2) The Administrative Unit provides general management to the regional program by:

- (a) Preparing a regional plan that will include administrative structure, provision of direct and consultation services to eligible children, their families and staff, inservice activities, supervision of instruction, subcontracting and budget;
- (b) Serving as fiscal agent for the region including arrangement of subcontracts; preparation of budgets for the receipt of local, state, and federal funds; provision of reports regarding child data, progress, and services; and the management of all fiscal functions including but not limited to, business services;
- (c) Selecting, hiring, and directing regional employees using funds granted for that purpose and making employee benefits consistent with other district employees;
- (d) Appointing a regional coordinator who will give general direction to the regional program and act as liaison to the Department; and
- (e) Appointing a Regional Advisory Council to provide advice to the Administrative unit on program and policy direction.

(3) The Regional Advisory Council consists of seven to eleven members representing each county in the region. At least one person must represent each of the following categories:

- (a) Superintendent of an education service district or local school district;
- (b) Special education supervisor or teacher of an education service district or local school district;
- (c) Individual who supervises or provides early intervention or early childhood special education services;
- (d) Director on board of an education service district or local school district;
- (e) Individual with a disability or parent of an eligible child.
- (f) Regular education teacher or building administrator.

(4) The Administrative Unit governing board will request names from each education service district, school district, county school district, and early intervention and early childhood special education program in the area served by the regional program and make appointments to the council.

MEETING DATES

Monday, October 17, 2022: 9:30 – 11:30 AM

Monday, January 23, 2023: 9:30 – 11:30 AM

Monday, May 15, 2023: 9:30 – 11:30 AM

**2022-2023 Southern Oregon ESD
RESOLUTION #9**

April 19, 2023

Participation in the Oregon Education Service District
Support Network for 2023-2026

WHEREAS, the Oregon State Legislature has established education service districts, otherwise known as ESDs, to assist school districts and the Oregon Department of Education in achieving Oregon’s educational goals by providing equitable, high quality, cost-effective and locally responsive educational services at a regional level; and,

WHEREAS, over the years, Oregon’s ESDs, both individually and collectively, have focused on this mission to meet the needs of the State by working in concert with each other and with the Oregon Department of Education; and,

WHEREAS, the Oregon Association of Education Service Districts has formalized this work through the formation of the Oregon ESD Support Network in order to ensure the equity of, and access to, educational opportunity for all of Oregon's Children; to utilize all Oregon ESDs in a coordinated and integrated approach to focus on statewide implementation of targeted initiatives; to build capacity at each ESD; to build upon existing networks and partnerships to ensure and maximize efficiency for school districts and their students across the state of Oregon; to support ODE and other state entities in the effective and efficient design and implementation of initiatives requiring statewide or multi-ESD coordination and collaboration; and, to provide a single point of contact for ODE and other entities with interest in working with Oregon ESDs functioning as a Network; and,

WHEREAS, Oregon’s ESDs have developed Core Principles and Operating Agreements and Operational Protocols to provide the structure and governance for the Oregon ESD Support Network.

NOW, THEREFORE, BE IT RESOLVED, that the Board of Directors of Southern Oregon Education Service District approves participation in the Oregon Education Service District Support Network for 2023-2026 in accordance with the stated Core Principles, Operating Agreements, and Operational Protocols.

Adopted this _____ day of _____.

Rosie Converse, Board Chair
Southern Oregon ESD

Scott Beveridge, Superintendent
Southern Oregon ESD

**2022-2023 Southern Oregon ESD
RESOLUTION #10
April 19, 2023**

BE IT RESOLVED BY THE BOARD OF DIRECTORS OF SOUTHERN OREGON EDUCATION SERVICE DISTRICT THAT THE FOLLOWING FUNDS ARE ADOPTED AND APPROPRIATED FOR THE 2022-2023 FISCAL YEAR. A COPY OF THE FORMAL BUDGETS IS ATTACHED

STATE/OTHER FUNDS (290):

		1000	2000	3000	TOTAL
ACCT	TITLE	INSTRUCT	SUPPORT	COMMUNITY	REQUIRE
290-768	EMERGING STEM HUB		178,544.00		178,544.00
290-840	SOBAASS		230,531.00	50,000.00	280,531.00
	TOTAL - STATE/OTHER FUNDS	-	409,075.00	50,000.00	459,075.00

Rosie Converse, Chair

Scott Beveridge, Superintendent-Clerk