

AGENDA

Southern Oregon Education Service District BOARD OF DIRECTORS REGULAR MEETING

6:00 PM – Wednesday, September 20, 2023
SOESD Administration Office
101 North Grape Street, Medford OR 97501



1. Preliminary

- A. Call to Order/Roll Call
- B. Land Acknowledgment
- 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 – September, October, and November 2023

4. Education

- A. Student Behavioral Health and Wellness
- B. Board Education Topics for 2023-2024

5. Administration

- A. Nominations for OSBA Legislative Policy Committee
- B. Contract for Services with BASE
- C. Contract for Services with Black Southern Oregon Alliance
- D. Amendment to Contract for Services with Playworks Education Energized
- E. Contracts for Staffing Services
- F. SOESD Special Education Restructuring
- G. SOESD Strategic Plan

6. Business Affairs

Related Party Questionnaire

7. Miscellaneous

- A. Next Regular Meeting: October 18, 2023, 6:00 PM, SOESD Administration Office
- B. OSBA Fall Regional Meeting: October 30, 2023, 6:00 PM Dinner; 6:30 PM Business Meeting, Ashland Hills Hotel and Suites
- C. 2023 OSBA Annual Convention: Preconference, November 9, 2023; Main Conference, November 10-11, 2023. Portland Marriott Downtown Waterfront Hotel.

8. 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, September 20, 2023: <https://forms.gle/YA4ghE8vdcboDPU7>

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
Southern Oregon ESD Board of Directors Regular Meeting
SOESD Administration Office
101 North Grape Street, Medford, Oregon
6:00 PM – Wednesday, September 20, 2023

1. Preliminary

- A. Call to Order/Roll Call
- B. Land Acknowledgment
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 SOESD’s 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:
 - Organizational Meeting, July 19, 2023 ([Pages 5-10](#))
- C. Personnel Report
New Licensed Hires
Administration recommends offers of employment contracts for the 2023-2024 academic year to:
 - Eriksen Allen, Special Education Teacher
 - Macy Clark, Occupational Therapist
 - Jody Guggia, School-Based Mental Health Interventionist
 - Heather Katz, Board Certified Behavior Analyst
 - Karen King, Occupational TherapistAdministration recommends the offer of an employment contract for the 2023-2024 fiscal year to:
 - Andrea Townsend, School Improvement Coordinator
- D. Financial Report
The financial report for the period ending August 31, 2023, is included for your review. ([Pages 11-17](#))
PROPOSED ACTION: Move to approve all items on the consent agenda.

3. Communications

SOESD Superintendent’s Schedule of Meetings: September, October, and November 2023
Superintendent Beveridge will review his calendar of scheduled meetings for the three- month period. ([Pages 18-20](#))

4. Education

- A. Student Behavioral Health and Wellness
Kylee Harrison, School Improvement Services Coordinator, will present an overview of SOESD’s Student Behavioral Health and Wellness Program.

- B. Board Education Topics, 2023-2024
Education topics for 2023-2024 will be discussed.

5. Administration

- A. Nominations for OSBA Legislative Policy Committee
This year, all OSBA Legislative Policy Committee (LPC) positions are up for election. Serving on the LPC provides an opportunity to develop leadership skills and impact issues at the state and federal levels. Board members interested in running for a position on the LPC need to be nominated by a member board within their region through official board action. Please inform Chair Wright in advance of the meeting if you are interested in being nominated to run for the OSBA Legislative Policy Committee, Southern Region #5. Candidate nomination materials are due to the OSBA office by Friday, September 29, 2023. A summary of the essential duties of the LPC members can be reviewed on the OSBA website at this link:

<https://osba.org/legislative-policy-committee/>

PROPOSED ACTION: Move to nominate _____ for the OSBA Legislative Policy Committee, Southern Region #5.

- B. Contract for Services with BASE
Administration requests board approval to enter into an agreement with BASE not to exceed \$112,000.00. Services will include provision of 32 Youth Program meetings and activities during the 2023-2024 academic year in accordance with the ODE Southern Oregon Black/African American Student Success (SOBAASS) grant.

PROPOSED ACTION: Move to approve entering into an agreement with BASE not to exceed \$112,000.00.

- C. Contract for Services with Black Southern Oregon Alliance (BSOA)
Administration requests board approval to enter into an agreement with BSOA not to exceed \$128,500.00. 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.

PROPOSED ACTION: Move to approve entering into an agreement with Black Southern Oregon Alliance not to exceed \$128,500.00.

- D. Amendment to Contract for Services with Playworks Education Energized
On June 21, 2023, the Board of Directors approved entering into an agreement with Playworks Education Energized not to exceed \$261,000.00. The agreement covers continuation of digital services, *Playworks* and *Keep Playing* as well as in person workshops requested by constituent school districts to be provided during the 2023-2024 school year. Administration requests authorization to increase the contract by \$60,000.00 which provides for three more districts to receive the two-day Recess Implementation workshop and refresher workshops for districts in need of review as they implement Playworks or have newly hired instructional assistants to be trained.

PROPOSED ACTION: Move to approve increasing the agreement with Playworks Education Energized by \$60,000.00, for a total contract amount not to exceed \$321,000.00

- E. Contracts for Staffing Services
Administration requests board approval to enter into agreements for the 2023-2024 school year for staffing services as detailed in the table below. All efforts to advertise and fill these positions through the employment process have been unsuccessful.

Epic Special Education Staffing	• Virtual School Psychologist	1.0 FTE	\$189,000.00
	• Occupational Therapist	0.3 FTE	

Presence Learning	<ul style="list-style-type: none"> • Speech-Language Pathologist • School Psychologist Testing Platform 	1.0 FTE --	\$170,000.00
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PROPOSED ACTION: Move to approve entering into agreements for staffing services not to exceed the amounts presented.

- F. SOESD Special Education Restructuring
Superintendent Beveridge will brief the board on SOESD Special Education restructuring in line with the strategic plan initiative to assess, redesign, implement, monitor, and adjust Special Education services to best meet district needs.
- G. SOESD Strategic Plan
Superintendent Beveridge will update the Board on SOESD’s Strategic Plan.

6. Business Affairs

Related Party Questionnaire

The Related Party Questionnaire is completed annually to document any related party activities between public health officials and their respective agencies. Examples of a related party activity: *An agency purchases a property owned by a board member or administrators of that agency.* To document activities of this type, the SOESD’s auditors have requested that administrators and board members complete a related party questionnaire. The questionnaire has been sent via US mail for you to complete and return to the board secretary in the enclosed self-addressed stamped envelope before the November board meeting. ([Pages 21-22](#))

7. Miscellaneous

- A. Next Regular Meeting: October 18, 2023, 6:00 PM, SOESD Administration Office
- B. OSBA Legislative Roadshow Regional Meeting: October 30, 2023, 6:00 PM Dinner; 6:30 PM Business Meeting, Ashland Hills Hotel and Suites.
Please let the board secretary know if you plan to attend.
- D. 2023 OSBA Annual Convention: Preconference, November 9, 2023; Main Conference, November 10-11, 2023. Portland Marriott Downtown Waterfront Hotel.
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.

8. Adjournment

Minutes in Brief SOUTHERN OREGON EDUCATION SERVICE DISTRICT
BOARD OF DIRECTORS ORGANIZATIONAL MEETING
WEDNESDAY, JULY 19, 2023

Call to Order The annual organizational meeting of the Southern Oregon Education Service District Board of Directors was held in the downstairs conference room of the SOESD administration office in Medford and by video/audio conference on Wednesday, July 19, 2023. Chair Converse called the meeting to order at 6:02 PM. Chair Converse read an excerpt from the SOESD’s Land Acknowledgement statement and led those attending in the Pledge of Allegiance.

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

SOESD staff members in attendance:
Mark Angle-Hobson
Jessica Bach
Scott Beveridge
Daniel Weaver

Oath of Office Superintendent Beveridge administered the oath of office to Robert Moore (Zone 3), Jessie Hecocta (Zone 4), and Ana Mannenbach (Zone 9).

Election of Chair and Vice-Chair Acting-Chair Converse opened nominations for members to serve as Chair and Vice-Chair for the 2023-2024 and 2024-2025 fiscal years.

Election of Board Chair

Member Moore nominated Justin Wright for the position of Board Chair.

THERE BEING NO FURTHER NOMINATIONS, IT WAS MOVED BY MEMBER MOORE, SECONDED BY MEMBER MANNENBACH TO:

Elect Justin Wright to serve as board chair for the 2023-2024 and 2024-2025 fiscal years.

MOTION CARRIED 6-0

Election of Board Vice-Chair

- Member Converse nominated Ana Mannenbach for the position of Board Vice-Chair.
- Member Valtierra-Sanchez nominated Rosie Converse for the position of Board Vice-Chair.

THERE BEING NO FURTHER NOMINATIONS, IT WAS MOVED BY MEMBER CONVERSE, SECONDED BY MEMBER HECOCTA TO:

Elect Ana Mannenbach to serve as Vice-Chair for the two-year term.

MOTION CARRIED 6-0

Comments from Representatives of the Association

No representatives from the classified or licensed associations 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:
 - June 21, 2023 Budget Hearing
 - June 21, 2023 Regular Meeting
- C. Personnel Report

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

Approve all items on the consent agenda.

MOTION CARRIED 6-0

Communication

SOESD Superintendent’s Schedule of Meetings for July, August, and September 2023

Superintendent Beveridge reviewed his schedule of meetings for the three-month period, noting that his calendar included several meetings with SOESD staff, the region’s superintendents, and ODE administrators to plan for and implement the requirements of Senate Bill 819. The statute requires notification to students and parents of new rights under the law related to instructional time.

Superintendent Beveridge reported that due to staff vacancies in Early Childhood Services (ECS), Director Peck has been assigned to Gilbert Creek ECS to provide continuity for the staff and families.

In reviewing his calendar, Mr. Beveridge also noted continued meetings to develop the SOESD Strategic Plan; Program planning meetings, including apprenticeship programs and new ways for teachers to become credentialed, and activities to fill the position of Chief Information Officer.

The SOESD All Staff Inservice will be held on Friday, August 25, 2023 at Southern Oregon University. Superintendent Beveridge encouraged board members to attend if their schedules permit.

Administration

- A. SOESD Organizational Structure for 2023-2024
Superintendent Beveridge reviewed the 2023-2024 organizational chart and list of administrative staff presented for board approval. Mr. Beveridge explained that additional changes were in process and he anticipated revisions would be presented for board approval in the months ahead. The superintendent announced that Andrea Townsend had accepted the position of School Improvement Coordinator in the Migrant Education/ELL/Indian

Education/SOBAASS programs. Jack Schwartz has accepted the position of Chief Information Officer. Superintendent Beveridge provided a brief background and description of these new administrators' qualifications. As noted earlier, Susan Peck will fill the vacancy in Early Childhood Services, and a model is being developed regarding the duties of the Special Education Director. The Board can anticipate a revised organizational chart will be presented for approval reflecting the Coordinator and CIO hiring processes and plans for structural changes in Special Education..

IT WAS MOVED BY MEMBER CONVERSE, SECONDED BY MEMBER MOORE TO:

Approve SOESD's organizational structure and approve the new organizational chart as presented for 2023-2024.

MOTION CARRIED 6-0

- B. Organizational Items for 2023-2024
1. District Clerk and Deputy Clerk – The superintendent is charged by law to be named as clerk. Administration recommends that the Chief Financial Officer be named as deputy clerk.
 2. Safety Officer – Administration recommends that the Board appoint the Chief Financial Officer to serve as safety officer.
 3. Budget Officer – The superintendent-clerk should be designated as the district's budget officer.
 4. Newspaper of Record – Administration recommends that the Grants Pass Daily Courier be named the newspaper of record.
 5. Mileage Reimbursement Rate for Staff and Board – It has been Board practice to pay the IRS-approved rate. Administration recommends continuation of this practice.
 6. Authorization to Submit Grant and Contract Proposals – It is necessary to respond quickly to grant and contract opportunities. Administration requests that the Board continue to authorize the superintendent and the CFO, in the superintendent's absence, to submit proposals for grants and contracts as well as accept awards during the 2023-2024 fiscal year.
 7. Authorization to Request Contract Funds – Administration recommends that the Board continue its practice of authorizing the signatures of the superintendent or CFO to request payments from funding sources.
 8. Coordination of Americans with Disabilities Act – Administration recommends that the Chief Human Resources Officer be named Section 504 / ADA coordinator.
 9. Attendance Officer – State law requires ESDs to name an attendance officer. Administration recommends the appointment of the superintendent to serve in that role.
 10. Board Attorney – Attorneys in the law firm of Garrett Hemann Robertson, P.C., have served as the Board's legal counsel, and Administration recommends they continue in that capacity. It is requested that the Board authorize the superintendent to seek specialized legal counsel, when deemed necessary, from Garrett Hemann Robertson law firm.
 11. Auditor – Per existing contract, Administration recommends that Isler Medford LLC serves as the district's auditor for 2023-2024.
 12. Title IX Coordinator – Administration recommends that the Chief Human

Resources Officer be designated as the Title IX Coordinator.

13. Authorized Depositories of Funds – Administration recommends two depositories of funds: First Interstate Bank for general operation, and State of Oregon Local Government Investment Pool.
14. Local Contract Review – It is recommended that the Southern Oregon ESD Board of Directors act as the district’s Local Contract Review Board.
15. Identifying Purchasing Practices – It is recommended that Southern Oregon ESD continue its practice of following the Attorney General’s Model Public Contract Rules and ORS 279 pertaining to public contracting.
16. Insurance Agent of Record – SOESD’s Insurance Agent of Record is Lloyd Williamson, Protectors Insurance.

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

Accept administration’s recommendations as presented for organizational items 1 through 16.

MOTION CARRIED 6-0

- C. Regional Advisory Council (RAC) - Board Member Representation
It is required that an ESD or local school board member hold a seat on the Regional Advisory Council. The Council meets three times a year to discuss matters related to Special Education Regional Inclusive Services (RIS).

IT WAS MOVED BY MEMBER MOORE, SECONDED BY MEMBER HECOCTA TO:

Appoint Rosie Converse to serve as the Board’s representative on the Regional Advisory Council.

MOTION CARRIED 6-0

- D. Contract for Services with Belong Partners
Administration requested board approval to enter into agreements with Belong Partners (formerly Sound Discipline) not to exceed \$312,100.00 for multiple workshop series, district partnerships, coaching, and consultation provided to educators throughout the region during the 2023-2024 school year. The provision of these services was again ranked by component school districts as priority tier one services and included in the SOESD Student Success Act Comprehensive Support Plan as part of the 2023-24 Local Service Plan.

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

Approve entering into agreements with Belong Partners (Sound Discipline) at a cost not to exceed \$312,100.00.

MOTION CARRIED 6-0

- E. Contracts for Staffing Services
Administration requested the Board’s approval to enter into agreements for the 2023-2024 school year for staffing services as detailed in the table below. All efforts to advertise and fill these positions through the employment process have been unsuccessful.

Blazerworks	Sign Language Interpreter	5.0 FTE	\$2,250,000.00
	Teacher of Deaf and Hard of Hearing	2.0 FTE	
	Teacher of Visually Impaired	2.0 FTE	
	School Psychologist	7.0 FTE	
	Autism Consultant	0.6 FTE	
Tyler York	Teacher of Visually Impaired (with extended school-year services)	1.0 FTE	\$174,400.00

IT WAS MOVED BY MEMBER CONVERSE, SECONDED BY MEMBER HECOCTA TO:

Approve entering into agreements for staffing services not to exceed the amounts presented.

MOTION CARRIED 6-0

- F. Strategic Planning Priorities for 2023-2024
Superintendent Beveridge presented the proposed Strategic Plan for 2023-2025.

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

Adopt the 2023-2024 Strategic Plan as presented.

MOTION CARRIED 6-0

Business Services

- A. 2023-2024 SOESD Resolution 1, 2, 3, and 4
Chief Financial Officer Daniel Weaver explained these resolutions are presented annually and provide operational authority in the business areas.
IT WAS MOVED BY MEMBER MOORE, SECONDED BY MEMBER CONVERSE TO:
Adopt 2023-2024 SOESD Resolutions 1, 2, 3, and 4.
MOTION CARRIED 6-0
- B. Authorization for Staff to Sign Checks
Administration recommended Scott Beveridge, Daniel Weaver, and Jessica Bach be designated as authorized staff to sign checks during fiscal year 2023-2024. The ESD continues to use a facsimile signature for its accounts payable and payroll check runs. Superintendent Beveridge’s signature will appear on that facsimile.
IT WAS MOVED BY MEMBER MOORE, SECONDED BY MEMBER MIDDLETON TO:
Approve the recommendations of administration regarding persons authorized to sign checks during the 2022-2023 fiscal year.
MOTION CARRIED 6-0
- C. Filing Budget Documents
CFO Weaver reported that SOESD’s 2023-2024 budget document had been filed with each of the assessors and clerks’ offices in Jackson, Josephine, and Klamath Counties.

Miscellaneous

- A. OSBA Summer Board Conference, Salem Convention Center, August 11, 2023 (Preconference), August 12-13, 2023 (Main Conference)
- B. All SOESD Staff Inservice, August 25, 2023, Southern Oregon University, 8:30 AM – 12:00 PM.

- C. SOESD Board of Directors Regular Meeting, September 20, 2023, 6:00 PM, SOESD Administration Office
- D. 2023 OSBA Annual Convention, Portland Marriott Downtown Waterfront, November 9, 2023 (Preconference), November 10-11, 2023 (Main Conference).

Adjournment

The organizational meeting of the SOESD Board of Directors adjourned at 7:09 PM.

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

100	GENERAL FUND	BUDGET	EXPENDED	BALANCE	% SPT	REVENUE	% RECD
101	ADMIN/OPERATIONS	3,401,074.00	585,826.01	2,815,247.99	17.2%		
102	TECHNOLOGY MEDIA SERVICES	3,274,814.00	567,277.59	2,707,536.41	17.3%		
103	SPECIAL EDUC SERVICES	13,133,650.00	115,494.72	13,018,155.28	0.9%		
104	SPEECH	507,200.00	8,480.09	498,719.91	1.7%		
106	INTERPRETERS	1,577,136.00	34,906.89	1,542,229.11	2.2%		
107	PSYCHOLOGY	1,372,140.00	24,290.80	1,347,849.20	1.8%		
108	BRAILLIST	295,740.00	2,559.95	293,180.05	0.9%		
109	STEPS PLUS PROGRAM	2,093,000.00	47,418.68	2,045,581.32	2.3%		
110	OT / PT	356,300.00	13,670.09	342,629.91	3.8%		
113	REGIONAL/STATEWIDE INITIATIVES	252,656.00	57,718.12	194,937.88	22.8%		
114	CAREER/TECHNICAL ED	298,889.00	51,881.28	247,007.72	17.4%		
115	ENGLISH SECOND LANG	476,980.00	69,781.07	407,198.93	14.6%		
117	AUDIOLOGY	180,000.00	7,175.61	172,824.39	4.0%		
181	SCHOOL BASED HEALTH & WELLNESS	1,226,000.00	2,994.87	1,223,005.13	0.2%		
192	CARE	819,000.00	13,858.72	805,141.28	1.7%		
	TOTAL (100)	29,264,579.00	1,603,334.49	27,661,244.51	5.5%	5,035,316.72	17.2%
	August 31, 2022	27,333,519.00	1,553,795.83	25,779,723.17	5.7%	4,526,335.80	16.6%
	BOARD ACCOUNTS - 2310	BUDGET	EXPENDED	BALANCE	% SPT		
	340-BOARD TRAVEL	20,000.00	3,229.33	16,770.67	16.1%		
	351-TELEPHONE	1,000.00	0.00	1,000.00	0.0%		
	381-AUDIT	15,000.00	0.00	15,000.00	0.0%		
	382-LEGAL SERVICES	70,000.00	8,711.00	61,289.00	12.4%		
	388-ELECTIONS	10,000.00	0.00	10,000.00	0.0%		
	390-OTHER SERVICES	2,000.00	1,176.00	824.00	0.0%		
	410-SUPPLIES	1,000.00	156.21	843.79	15.6%		
	640-DUES & FEES	50,000.00	39,351.00	10,649.00	78.7%		
	651-LIABILITY INS	7,500.00	6,180.00	1,320.00	82.4%		
	TOTAL BOARD ACCTS.	176,500.00	58,803.54	117,696.46	33.3%		
210	SP REV -FEDERAL	BUDGET or AWARD EST	EXPENDED	BALANCE	% SPT	REVENUE	% RECD
0	SPECIAL REVENUE-FEDERAL	15,877,039.00	0.00	15,877,039.00	0.0%	0.00	0.0%
201	IDEA CONSORTIUM	0.00	0.00	0.00	N/A	0.00	N/A
202	CCL PROJECT RESOURCE HUB	0.00	45,966.89	(45,966.89)	N/A	5,493.79	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	79,771.94	(79,771.94)	N/A	0.00	N/A

205	PERKINS BASIC 22-23	0.00	17,700.14	(17,700.14)	N/A	16,989.29	N/A
206	MIG SUMMER SCHL	0.00	219,200.65	(219,200.65)	N/A	0.00	N/A
208	TITLE 1C MIG RSY 22-23	0.00	209,109.71	(209,109.71)	N/A	106,105.50	N/A
209	TITLE 1C MIG RSY 21-22	0.00	28,105.49	(28,105.49)	N/A	0.00	N/A
210	TITLE 1C-PRESCHL 21-22	0.00	3,757.52	(3,757.52)	N/A	0.00	N/A
211	TITLE 1C PRESCHL 22-23	0.00	9,466.02	(9,466.02)	N/A	2,398.72	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	77,714.37	(77,714.37)	N/A	0.00	N/A
215	ESD TECHNICAL ASSISTANCE	0.00	28,676.10	(28,676.10)	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	12,578.03	(12,578.03)	N/A	0.00	N/A
218	INDIAN EDUCATION SERVICES	0.00	97.37	(97.37)	N/A	0.00	N/A
219	COVID-19 SUPPORT	0.00	29,827.86	(29,827.86)	N/A	4,794.93	N/A
220	ESDs For S E L	0.00	14,797.32	(14,797.32)	N/A	39,602.81	N/A
221	GEER	0.00	0.00	0.00	N/A	0.00	N/A
222	GEER - SSPS	0.00	20,838.37	(20,838.37)	N/A	0.00	N/A
223	COMPUTER SCIENCE - GEER	0.00	2,316.56	(2,316.56)	N/A	0.00	N/A
225	SOFRP	0.00	79,767.87	(79,767.87)	N/A	(221,954.10)	N/A
234	EARLY LEARNING - FPS	0.00	13,227.90	(13,227.90)	N/A	0.00	N/A
235	FAMILY SUPPORT SERVICES 21-23	0.00	1,766.88	(1,766.88)	N/A	0.00	N/A
236	EL HUB PDG (Parent Leadership)	0.00	0.00	0.00	N/A	0.00	N/A
237	PDG DISCRETIONARY	0.00	0.00	0.00	N/A	0.00	N/A
243	YOUTH TRANSITION PROGRAM	0.00	59,011.97	(59,011.97)	N/A	0.00	N/A
247	TITLE III CONSORTIUM 21-22	0.00	0.00	0.00	N/A	0.00	N/A
248	TITLE III CONSORTIUM 22-23	0.00	4,670.54	(4,670.54)	N/A	4,670.54	N/A
261	CHILD CARE RESOURCE NETWORK 21-23	0.00	114,833.49	(114,833.49)	N/A	0.00	N/A
262	FAMILY SUPPORT & CONNECTIONS	0.00	67,958.36	(67,958.36)	N/A	0.00	N/A
272	EI/ECSE	0.00	30,414.06	(30,414.06)	N/A	(48,067.75)	N/A
273	TECH ASSIST - CCRN	0.00	0.00	0.00	N/A	0.00	N/A
276	TRANSITION NETWORK COORDINATOR	0.00	0.00	0.00	N/A	0.00	N/A
277	TNF - STUDENT SUMMIT 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	7,322.18	(7,322.18)	N/A	0.00	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 22-23	0.00	19,806.56	(19,806.56)	N/A	11,105.13	N/A
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	(425.36)	N/A
307	LTCT IDEA 619	0.00	0.00	0.00	N/A	0.00	N/A
308	LTCT TITLE 1D 21-23	0.00	422.10	(422.10)	N/A	0.00	N/A
309	LTCT IDEA 21-23	0.00	0.00	0.00	N/A	0.00	N/A
310	CARL PERKINS TECH PREP	0.00	0.00	0.00	N/A	0.00	N/A
311	MIECHV	0.00	2,375.41	(2,375.41)	N/A	(5,386.42)	N/A
312	LTCT ESSER III	0.00	0.00	0.00	N/A	0.00	N/A
313	OCDD	0.00	7,025.15	(7,025.15)	N/A	0.00	N/A
316	MTSS REGIONAL COACHES	0.00	0.00	0.00	N/A	0.00	N/A
318	HS MATH PATHWAY CONVENING	0.00	0.00	0.00	N/A	0.00	N/A
319	ESSER A3	0.00	16,029.30	(16,029.30)	N/A	13,925.84	N/A
TOTAL (210)		15,877,039.00	1,224,556.11	14,652,482.89	7.7%	(70,747.08)	-0.4%
August 31, 2022		12,727,803.00	804,361.35	11,923,441.65	6.3%	(115,557.00)	-0.9%

290	SP REV -OTHER	BUDGET or AWARD EST	EXPENDED	BALANCE	% SPT	REVENUE	% RECD
0	SPECIAL REVENUE-OTHER	30,542,256.00	0.00	30,542,256.00	0.0%	0.00	0.0%
717	PP COORDINATED ENROLLMENT	0.00	69,430.45	(69,430.45)	N/A	0.00	N/A
718	GYO GRANT	0.00	46,226.82	(46,226.82)	N/A	23,282.77	N/A
719	REGIONAL PILOT - ONLINE COURSE DELIVERY	0.00	31,918.65	(31,918.65)	N/A	36,051.70	N/A
749	EDUCATOR ADVANCEMENT FUND	0.00	189,073.71	(189,073.71)	N/A	(974,949.16)	N/A
751	ADV MATH IN REAL LIFE	0.00	51,232.81	(51,232.81)	N/A	122,409.00	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	4,224.58	(4,224.58)	N/A	(573.99)	N/A
756	SUMMER LEARNING GRANT	0.00	0.00	0.00	N/A	3,705.68	N/A
757	LONG TERM CARE TREATMENT	0.00	69,985.83	(69,985.83)	N/A	51,314.83	N/A
758	WESD DASHBOARD	0.00	0.00	0.00	N/A	0.00	N/A
759	FCCN	0.00	0.00	0.00	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	7,983.12	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
764	REENGAGEMENT COLLABORATIVE	0.00	0.00	0.00	N/A	(60,942.44)	N/A
765	SUPPORT - CTE CAREER PATHWAYS	0.00	252.90	(252.90)	N/A	238.81	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	34,550.83	(34,550.83)	N/A	0.00	N/A
768	EMERGING REGIONAL STEM HUB	0.00	0.00	0.00	N/A	0.00	N/A
769	REGIONAL EDUCATOR NETWORK (SOREN)	0.00	72,759.87	(72,759.87)	N/A	(102,218.23)	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	1,170.05	(1,170.05)	N/A	134,951.49	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	0.00	0.00	N/A	(29,003.53)	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	3,700.23	(3,700.23)	N/A	9,985.30	N/A
781	CCRR SSA PSP ADMIN	0.00	27,172.14	(27,172.14)	N/A	0.00	N/A
782	CCRR SSA PSP COACHING	0.00	30,511.83	(30,511.83)	N/A	(9,985.30)	N/A
783	SHARED SERVICES - SSA BUSINESS COACHING	0.00	14,852.01	(14,852.01)	N/A	2,246.92	N/A
802	CLASSROOM AT CRATER LAKE	0.00	0.00	0.00	N/A	0.00	N/A
804	JACKSON CARE CONNECT/CCRN	0.00	0.00	0.00	N/A	0.00	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	0.00	N/A

809	AMBITIOUS INSTRUCTION	0.00	0.00	0.00	N/A	0.00	N/A
810	SOTCE	0.00	0.00	0.00	N/A	50,000.00	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	154,279.33	(154,279.33)	N/A	151,261.49	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	0.00	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	0.00	N/A
824	ROLLOVER FUNDS	0.00	0.00	0.00	N/A	0.00	N/A
825	STATE - R A C	0.00	41,364.31	(41,364.31)	N/A	(15,397.50)	N/A
828	TARGET GRANT	0.00	0.00	0.00	N/A	0.00	N/A
829	MIGRANT/ELL WORKSHOP	0.00	20,930.00	(20,930.00)	N/A	13,208.11	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	0.00	N/A
839	CC4A PROGRAM SUPPORT	0.00	8,659.12	(8,659.12)	N/A	0.00	N/A
840	SOBAASS	0.00	518.91	(518.91)	N/A	0.00	N/A
841	TRUANCY GRANT	0.00	0.00	0.00	N/A	0.00	N/A
842	FORD FAMILY FOUNDATION	0.00	10,000.00	(10,000.00)	N/A	10,000.00	N/A
843	STEM INNOVATION	0.00	52,025.28	(52,025.28)	N/A	44,765.09	N/A
844	MENSTRUAL DIGNATY ACT	0.00	0.00	0.00	N/A	0.00	N/A
845	SUPERINTENDENT ASSOC LUNCHES	0.00	0.00	0.00	N/A	0.00	N/A
846	NAV SUCCESSFUL ED - STUDENTS AND FAM	0.00	0.00	0.00	N/A	0.00	N/A
847	TRIBAL HISTORY SHARED HISTORY PD	0.00	11,566.88	(11,566.88)	N/A	11,041.11	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	6,819.63	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	3,357.31	(3,357.31)	N/A	22,015.70	N/A
854	GRAY FAMILY FUND	0.00	0.00	0.00	N/A	0.00	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	0.00	0.00	N/A	(13,057.55)	N/A
858	MEDIA LIBRARY - OVERDRIVE	0.00	12,500.00	(12,500.00)	N/A	15,484.17	N/A
859	ED TECH SUMMIT	0.00	4,861.89	(4,861.89)	N/A	1,003.18	N/A
860	CLIMATE CHANGE EDUC-CLASS AT CL	0.00	0.00	0.00	N/A	0.00	N/A
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
870	LICC	0.00	0.00	0.00	N/A	5,118.27	N/A
872	EI/ECSE	0.00	150,322.27	(150,322.27)	N/A	(1,122,612.23)	N/A
873	PROGRAM SUPPORT EI/ECSE	0.00	29,844.37	(29,844.37)	N/A	922,909.59	N/A
874	PRESCHOOL PROMISE - STARTUP	0.00	0.00	0.00	N/A	0.00	N/A
876	TRANSITION NETWORK FACILITATOR	0.00	26,568.01	(26,568.01)	N/A	(41,252.18)	N/A
881	EDUCATIONAL INSTRUCTION	0.00	0.00	0.00	N/A	0.00	N/A
882	EARLY LEARNING HUB	0.00	65,786.61	(65,786.61)	N/A	569,693.09	N/A
887	TNF STUDENT SUMMITS	0.00	0.00	0.00	N/A	0.00	N/A
888	CTE - EQUIPMENT REIMBURSEMENT	0.00	0.00	0.00	N/A	135,271.82	N/A
889	ADV REGIONAL STEM HUB	0.00	32,781.28	(32,781.28)	N/A	186,734.00	N/A
900	MATHWAYS - RPD	0.00	0.00	0.00	N/A	0.00	N/A
901	SOESD PROGRAM SUPPORT	0.00	40,625.22	(40,625.22)	N/A	1,681,974.77	N/A
902	HB4030-2	0.00	0.00	0.00	N/A	0.00	N/A
903	SSPS	0.00	0.00	0.00	N/A	0.00	N/A
904	RETIRE/SABATICAL	0.00	551,404.43	(551,404.43)	N/A	1,115,248.12	N/A
905	FMLA	0.00	0.00	0.00	N/A	63,123.97	N/A
906	HB4030	0.00	0.00	0.00	N/A	0.00	N/A
909	SPECIAL EDUCATION - DISTRICT SUPPORT	0.00	4,999.97	(4,999.97)	N/A	0.00	N/A
910	SUMMER SP-ED SERVICES	0.00	44,744.02	(44,744.02)	N/A	(6,399.74)	N/A
912	SPECIAL PROJECTS	0.00	0.00	0.00	N/A	0.00	N/A
913	WRITING ASSESSMENT	0.00	0.00	0.00	N/A	0.00	N/A
915	REGIONAL-LOCAL CONTRACTS	0.00	3,738.74	(3,738.74)	N/A	(120,130.88)	N/A
916	STATE REGIONAL	0.00	123,488.54	(123,488.54)	N/A	0.00	N/A
918	K PARTNERSHIP INNOVATION	0.00	14,386.13	(14,386.13)	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	273.73	(273.73)	N/A	19,114.32	N/A
924	SOU TECHNOLOGY	0.00	0.00	0.00	N/A	0.00	N/A
926	AUTISM - PARENT PARTNER	0.00	528.89	(528.89)	N/A	8,734.33	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	9,515.32	N/A
932	KLAMATH TECH	0.00	0.00	0.00	N/A	0.00	N/A
935	STAFF CONTRACTS	0.00	5,800.10	(5,800.10)	N/A	21,622.83	N/A
938	PD NETWORK SERVICES	0.00	0.00	0.00	N/A	22,000.00	N/A
940	CESD - SOBAASS	0.00	0.00	0.00	N/A	0.00	N/A
941	READING GRANT	0.00	0.00	0.00	N/A	0.00	N/A
942	FOLLETTE CONTRACT	0.00	0.00	0.00	N/A	6,135.77	N/A
943	YTP PROGRAM	0.00	15,654.92	(15,654.92)	N/A	0.00	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	217,286.08	N/A
947	CURRICULUM WORKSHOP	0.00	0.00	0.00	N/A	1,545.49	N/A
948	WEB PD	0.00	0.00	0.00	N/A	2,886.42	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	15,700.34	(15,700.34)	N/A	250,000.00	N/A
957	OR PROJECT	0.00	4,841.24	(4,841.24)	N/A	307,434.29	N/A
960	COOP PURCHASING	0.00	293,449.59	(293,449.59)	N/A	118,440.23	N/A
961	COOP PURCHASING SUPPORT	0.00	10,176.07	(10,176.07)	N/A	874.96	N/A
964	EMPLOYEE SERVICES	0.00	113.10	(113.10)	N/A	740.63	N/A
965	MIG PROGRAM SUPPORT	0.00	0.00	0.00	N/A	7,126.45	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
969	STEPS/TRANSITION DONATIONS	0.00	0.00	0.00	N/A	750.00	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	0.00	N/A
976	TELECONFERENCING	0.00	0.00	0.00	N/A	0.00	N/A
978	SCHOOL IMPROVEMENT WORKSHOPS	0.00	0.00	0.00	N/A	155,928.45	N/A
982	READING RED	0.00	0.00	0.00	N/A	0.00	N/A
983	OREGON ONLINE	0.00	0.00	0.00	N/A	38,439.71	N/A
989	ADV CTE REVITALIZATION	0.00	0.00	0.00	N/A	0.00	N/A
990	MEDICAID ADMN CLAIMING	0.00	33,661.43	(33,661.43)	N/A	33,183.98	N/A
991	MAC DISTRICTS	0.00	10,487.61	(10,487.61)	N/A	(2,393.85)	N/A
996	OREGON COMMUNITY FOUNDATION	0.00	0.00	0.00	N/A	72,697.56	N/A
998	COMPUTER REPLACEMENT	0.00	0.00	0.00	N/A	0.00	N/A
999	INDIRECT COST POOL	0.00	173,156.70	(173,156.70)	N/A	2,672,782.85	N/A

TOTAL (290)	30,542,256.00	2,619,659.05	27,922,596.95	8.6%	7,076,309.85	23.2%
August 31, 2022	27,126,671.00	1,635,927.63	25,490,743.37	6.0%	9,081,011.56	33.5%

				%		%	
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	22,000,000.00	493,146.20	21,506,853.80	2.2%	10,558,280.08	48.0%
TOTAL (400)		22,000,000.00	493,146.20	21,506,853.80	2.2%	10,558,280.08	48.0%
August 31, 2022		9,000,000.00	65,057.68	8,934,942.32	0.7%	3,557,794.28	39.5%

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	4,246,166.00	141,423.47	4,104,742.53	3.3%	94,011.68	2.2%

655	WORKER'S COMP/MEDICAL	1,135,856.00	201,870.48	933,985.52	17.8%	1,797,683.12	158.3%
662	SB1049 - PERS	239,200.00	479.92	238,720.08	0.2%	173,763.88	72.6%
675	INTERNAL IT SUPPORT	269,810.00	0.00	269,810.00	0.0%	0.00	0.0%
694	PL OREGON	83,574.00	0.00	83,574.00	0.0%	67,884.80	81.2%
695	D P B	78,000.00	0.00	78,000.00	0.0%	0.00	0.0%
696	UNEMPLOYMENT ACCT	255,011.00	6,000.00	249,011.00	2.4%	418,231.35	164.0%
697	COPIES / FAX USAGE	152,408.00	9,744.68	142,663.32	6.4%	104,615.58	68.6%
TOTAL (600)		6,460,025.00	359,518.55	6,100,506.45	5.6%	2,656,190.41	41.1%
August 31, 2022		6,212,283.00	662,509.11	5,549,773.89	10.7%	2,521,788.52	40.6%

RECAP BY FUND		BUDGET or			%		%
		AWARD EST	EXPENDED	BALANCE	SPT	REVENUE	RECD
100	GENERAL FUND	29,264,579.00	1,603,334.49	27,661,244.51	5.5%	5,035,316.72	17.2%
210	SP REV - FEDERAL	15,877,039.00	1,224,556.11	14,652,482.89	7.7%	(70,747.08)	-0.4%
290	SP REV - OTHER	30,542,256.00	2,619,659.05	27,922,596.95	8.6%	7,076,309.85	23.2%
400	CAPITAL PROJECTS FUND	22,000,000.00	493,146.20	21,506,853.80	2.2%	10,558,280.08	48.0%
600	INTERNAL SERVICE	6,460,025.00	359,518.55	6,100,506.45	5.6%	2,656,190.41	41.1%
TOTAL ALL FUNDS		104,143,899.00	6,300,214.40	97,843,684.60	6.0%	25,255,349.98	24.3%
August 31, 2022		82,400,276.00	4,721,651.60	77,678,624.40	5.7%	19,571,373.16	23.8%
FUND BAL - 8/31/2023		<u>18,955,135.58</u>					
FUND BAL - 8/31/2022		<u>14,849,721.56</u>					

SOESD Superintendent's Meeting Schedule
September, October, and November 2023

September 2023

- 5 Cabinet Meeting
 - Program Planning with Jack Schwartz, Chief Information Officer
 - SOESD Data System Planning with Special Education Management Team and CIO Jack Schwartz
- 6 SOESD Education Association Labor-Management Meeting
 - 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
 - Planning Meeting with Diane Dunas and Andrée Johnson regarding SB 819
 - Early Childhood Services Staff Meeting Regarding Building Needs
- 7 Planning Meeting with Douglas ESD EI/ECSE regarding the Collaborative Center for Autism (CCA)
 - OAESD Governance Council Meeting
 - Cabinet Interview: Director of Student Services
 - Program Planning with René Brandon, Southern Oregon Early Learning Services (SOELS)
 - Andrée Johnson, Special Education Coordinator, Regarding SB 819 Planning Progress Update
- 8 Cabinet Meeting
 - OAESD Early Literacy Discussion
- 11 Program Planning with Susan Peck, Special Education
 - Program Planning with Jack Schwartz, Chief Information Officer
 - Planning with Jessica Bach, Sara Crawford, and Dawn Watson for OSBA's Fall Regional Meeting
 - Karla Clark, School Improvement / STEAM Hub Program Manager
- 12 Cabinet Meeting
 - Program Planning with Peter Buckley, Southern Oregon Success (SORS) Program Manager
 - Special Education Management (SEM) Team Meeting
- 13 Program Planning with Jack Schwartz, Chief Information Officer
- 14 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
- 18 Program Planning with Susan Peck, Special Education Director
 - Program Planning with Jack Schwartz, Chief Information Officer
 - SOESD Board Chair and Vice Chair
- 19 Cabinet Meeting
 - Southern Oregon Early Learning Services (SOELS) Governance Council Meeting
- 20 Special Education Management Meeting
 - SOESD Board of Directors Meeting
- 21 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
 - Jackson County PH/District Collaboration Meeting
 - Phoenix Campus: Furniture Selections Review
- 25 Program Planning with Susan Peck, Special Education Director
 - Southern Oregon Superintendents Meeting
- 26 Cabinet Meeting
- 27 Administrative Team Meeting
- 28 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

October 2023

- 2 Program Planning with Susan Peck, Special Education Director
Program Planning with Jack Schwartz, Chief Information Officer
- 3 Cabinet Meeting
- 4 SOESD Education Association Labor-Management Meeting
OAESD/ODE Program Cabinet Meeting
Planning with Jessica Bach, Sara Crawford, and Dawn Watson for OSBA's Fall Regional Meeting
- 5 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
Jackson County PH/District Collaboration Meeting
Program Planning with René Brandon, Southern Oregon Early Learning Services (SOELS)
- 9-10 OAESD Superintendent Retreat
- 12 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 Program Planning with Susan Peck, Special Education Director
Regional Advisory Council Meeting
Program Planning with Jack Schwartz, Chief Information Officer
- 17 Cabinet Meeting
Southern Oregon Early Learning Services (SOELS) Governance Council Retreat (tentative)
- 18 Special Education Management (SEM) Team
SOESD Board of Directors Meeting
- 19 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
- 23 Southern Oregon Superintendents Meeting
COSA's Regional Oregon Association of School Executives Meeting
- 24 Cabinet Meeting
- 25 Administrative Team Meeting
- 26 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
- 27 Rogue Workforce Partnership Quarterly Workforce Board Meeting
- 30 Program Planning with Susan Peck, Special Education Director
Program Planning with Jack Schwartz, Chief Information Officer
OSBA Fall Regional Meeting
- 31 Cabinet Meeting

November 2023

- 1 SOESD Education Association Labor-Management Meeting
- 2 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
Program Planning with René Brandon, Southern Oregon Early Learning Services (SOELS)
- 6 Program Planning with Susan Peck, Special Education Director
Program Planning with Jack Schwartz, Chief Information Officer

- 7 Cabinet Meeting
- 8 City of Medford Vision Implementation Committee Meeting
- 9 OAESD Governance Council
OSBA Annual Convention: Preconference
- 10-11 OSBA Annual Convention: Main Conference
- 13 Program Planning with Susan Peck, Special Education Director
Program Planning with Jack Schwartz, Chief Information Officer
- 14 Cabinet Meeting
Program Planning with Peter Buckley, Southern Oregon Success (SORS) Program Manager
COSA Oregon Association of School Executives Meeting
- 15 OAESD/ODE Program Cabinet Meeting
Special Education Management (SEM) Meeting
SOESD Board of Directors Meeting
- 16 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
- 20 Program Planning with Susan Peck, Special Education Director
Program Planning with Jack Schwartz, Chief Information Officer
- 21 Cabinet Meeting
Southern Oregon Early Learning Services (SOELS) Governance Council Meeting
- 27 Program Planning with Susan Peck, Special Education Director
Southern Oregon Superintendents Meeting
- 28 Cabinet Meeting
- 29 Administrative Team Meeting
- 30 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

Related Party Questionnaire

DATE: September 20, 2023
TO: SOESD Board Members Seated in the 2022-2023 Fiscal Year
FROM: Dan Weaver, Chief Financial Officer
RE: Related Party Questionnaire

In connection with an audit of our financial statements, please furnish answers to the following questions, sign your name, and return the questionnaire to Jessica Bach, Board Secretary, Southern Oregon Education Service District. The questionnaire is designed to obtain information about transactions between Southern Oregon Education Service District and any related parties.

Related parties include members of the governing body (city council, commissioners court, etc.); board members (board of education, zoning board, etc.); administrative officials (mayor, city manager, school superintendent, director of public works, etc.); immediate families of administrative officials, board members, and members of the governing body; and affiliated governmental units not included in the financial statements, such as a metropolitan water and sewer system.

Please answer all questions. If the answer to any question is “yes,” please explain in the space provided.

1. Have you or any related party of yours had any interest, direct or indirect, in any of the following transactions or pending or incomplete transactions since July 1, 2022 to which the Southern Oregon Education Service District was, or is to be, a party?

	YES	NO
• Sale, purchase, exchange, or leasing of property?	_____	_____
• Receiving or furnishing of goods, services, or facilities?	_____	_____
• Transfer or receipt of income or assets?	_____	_____
• Maintenance of bank balances as compensating balances for the benefit of another?	_____	_____
• Other transactions?	_____	_____

2. Have you or any related party of yours been indebted to or had a receivable from the Southern Oregon Education Service District at any time since July 1, 2022? Please exclude amounts due for ordinary travel and expense advances.

YES _____ NO _____

3. Are you aware of any other related party transactions, including side agreements, implicit or informal understandings, or other arrangements (whether oral or written), involving Southern Oregon Education Service District, or its related parties other than yourself?

YES _____ NO _____

To: Isler Medford

The answers to the foregoing questions are correctly stated to the best of my knowledge and belief.

Date: _____ Signature: _____

Name: _____ Title: _____