

Agenda

1. Call to Order and Roll Check

Presenter: Board Chair Rebecca Dyson

2. Land Acknowledgment

Presenter: Board Chair Rebecca Dyson

3. Adoption of Agenda *(At this time Board members are provided the opportunity to amend the Regular Session agenda.)*

Presenter: Board Chair Rebecca Dyson

4. Consent Agenda *(All items may be adopted by a single motion unless pulled for special consideration.)*

Presenter: Board Chair Rebecca Dyson

A. <u>Approval of Minutes</u>	<u>4</u>
B. <u>Personnel Report for August 2025</u>	<u>13</u>
C. <u>Board Meeting Schedule 2025-26</u>	<u>21</u>
D. <u>Superintendent Evaluation Process</u>	<u>22</u>
E. <u>Board-Superintendent Operating Agreements 2025-26</u>	<u>23</u>
F. <u>Policy Review Process</u>	<u>25</u>
G. <u>YMCA MOUs</u>	<u>26</u>

5. Bond Report 10 min.

Presenter: Executive Director of Operations, Steve Mitzel

A. <u>ASD Bond Report July 2025</u>	<u>28</u>
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Presenter: HMK Project Director, Josh Whitaker

6. ASD Housing Project Update 10 min. 67

Presenter: Edlen and Co. Owner, Matt Edlen

7. 2025-26 District Updates 10 min. 74

Presenter: Assistant Superintendent Michelle Cuddeback

8. Pacific Rim Bowl 5 min.

Presenter: Executive Director of Operations, Steve Mitzel

9. Recurring Reports 10 min.

A. OSEA Report

B. AEA Report

10. Board Reports 10 min.

Presenter: Board Chair Rebecca Dyson

11. Hear Public Comments (*The Ashland School District Board of Directors reserves this time for individuals to relay comments in writing to the Board regarding topics, not on the printed agenda.*)

Presenter: Board Chair Rebecca Dyson

12. Student Board Representative Report 10 min.

Presenter: Student Board Reps Alice Carnahan & Milo Leiserson

13. Superintendent Report 10 min.

Presenter: Superintendent Joseph Hattrick

14. Finance Report 10 min.

Presenter: Director of Business Services Sherry Ely

A. Finance Report for the period ending July 31, 2025 79

Presenter: Director of Business Services Sherry Ely

15. New Business

Presenter: Board Chair Rebecca Dyson

A. ACTION ITEM: 2025-26 District/Board Goals

86

Presenter: Superintendent Joseph Hattrick

16. Announcements and Appointments

Presenter: Board Chair Rebecca Dyson

A. Board Member Appointments: Vice Chair Hatch will serve as the board's legislative representative, Director Ruby will serve as the board representative to the Ashland Schools Foundation, and Director Rooklyn and Vice Chair Hatch will serve on the Superintendent Advisory Policy Workgroup.

B. The Board will meet for a work session on Thursday, August 28 at 6:30 PM via Zoom.

C. The board will hold its next Regular Session on Thursday, September 11, at 6:30 PM in the City Council Chamber, 1175 E. Main Street, Ashland, OR.

17. Adjourn

Minutes

1. **Call to Order and Roll Check**

Director Dyson welcomed everyone to the first official session of the new year and called the meeting to order. Roll check confirmed that all members were present: Dyson, Ruby, Rooklyn, Ferguson, and Hatch.

2. **Land Acknowledgment**

Director Hatch read the Land Acknowledgment.

3. **Organization of the Board for 2025-2026 School Year**

Director Dyson introduced the annual items of business.

3.A. Oath of Office

Recently elected board members Deltra Ferguson, Jordan Rooklyn, and Rebecca Dyson read aloud the Board Members' Oath of Office.

3.B. ACTION ITEM: Election of Board Chair (Policy BCB)

- ❖ **Motion:** Director Hatch moved, and Director Ferguson seconded to nominate Rebecca Dyson as Board Chair for the 2025-2026 school year. The motion carried by unanimous vote of the five members present.

3.C. ACTION ITEM: Election of Board Vice Chair (Policy BCB)

- ❖ **Motion:** Chair Dyson moved, and Director Ruby seconded to nominate Russell Hatch as Board Vice Chair for the 2025-2026 school year. The motion carried by unanimous vote of the five members present.

4. **Adoption of Agenda** (*At this time Board members are provided the opportunity to amend the Regular Session agenda.*)

Chair Dyson requested that we amend Agenda Item 8, Recurring Reports, by removing OSEA and AEA Reports and adding the AHS Student Representative Report.

- ❖ **Motion:** Director Ruby moved, and Vice Chair Hatch seconded adoption of the agenda as amended. The motion carried by unanimous vote of the five members present.

5. **Consent Agenda** (*All items may be adopted by a single motion unless pulled for special consideration.*)

Director Rooklyn requested to pull Item 5.F, Revised Policy for BD/BDA Board Meetings, and suggested that the board limit their meetings to 2.5 hours instead of 3 hours to respect staff, student, and family time.

- ❖ **Motion:** Director Rooklyn moved, and Vice Chair Hatch seconded, to adopt the revised Policy BD/BDA Board Meetings to reflect the new board meeting times of 6:30-9:00, with the possibility of two 30-minute extensions, upon board approval. The motion carried by unanimous vote of the five members present.

- ❖ **Motion:** Director Rooklyn moved, and Vice Chair Hatch seconded approval of the consent agenda with the exception of item 5.F. The motion carried by unanimous vote of the five members present.

5.A. Approval of Minutes

5.B. Personnel Report for July 2025

5.C. Willow Wind- Alternative Education Program Assurances

5.D. Superintendent Professional Development Plan

5.E. Resolution No. 2025-26 B-1 - Annual Designations for 2025-26

5.F. Revised Policy BD/BDA Board Meetings

6. Food Waste Audit Presentation

Recent 8th-grade TRAILS graduate, Alma Galicia, shared her capstone project on food waste at TRAILS Outdoor School. Alma conducted a food waste audit and used the collected data to provide solutions for reducing waste.

Alma made the following recommendations to help reduce food waste at TRAILS:

- Share basket for unopened food
- Only take what you can eat
 - Clear signage
 - Kitchen staff cut oranges into quarters
- Lengthening lunch period and moving recess before lunch
- Food scrap pick-up program
 - Secure bins picked up 2x per week
 - Reduce food going into the landfill
 - Education on how to separate food
 - Less money spent on trash
 - Lowers methane emissions
- TRAILS to be a pilot program for one year

The board was impressed with Alma's presentation and would be interested in a follow-up report to learn about the results of the pilot program.

7. Facilities Report

Executive Director of Operations, Steve Mitzel, provided an update on the final stages of the high school bond projects. The projects are approaching completion. Furniture will be returned to the library around July 21, and crews will continue working down to the first floor. Pavers are being installed in the quad. Some delays occurred due to the need to repair part of the main water line and the presence of outside groups on campus. Currently, there are between 40 and 50 workers on site daily. Reach out to Steve if you would like a hard-hat tour of the construction zone. A more detailed bond report will be presented in August, which is approximately two weeks before the project is finished.

8. Recurring Reports

8.A. Student Board Representative Report

Alice Carnahan and Milo Leiserson, the 2025-26 student board representatives, attended the July meeting and gave the following updates:

- Fresh Start counselors retreat will happen on August 9th
- Three groups of 9th grade Fresh Start sessions will take place the week of August 11th
- Basketball, soccer, football, and XC summer practices are going in full swing on campus as they prepare for fall/ winter seasons
- Students are excited to see their campus after the construction project is complete
- Pacific Rim Bowl, a football match that takes place every two years between Ashland and the Japan Allstars, is happening in Ashland at the AHS turf field on July 25th
- Nice to see AHS Band, Rowing, and Football in the 4th of July parade this year

9. Board Reports

Director Ruby has been paying attention to legislation regarding school funding and climate curriculum.

Director Ferguson expressed gratitude to the staff and former board members who have been very supportive and helpful. She will continue her self-study board work and enjoyed marching in the 4th of July parade.

Director Rooklyn expressed appreciation for the onboarding she has received from the staff and previous board members. She is looking forward to all that is ahead.

Vice Chair Hatch was invited to speak at the Democratic Party of Oregon's education caucus meeting. They were interested in getting a direct view of what the experience was like from the perspective of a school board member. Mr. Hatch said it was a positive meeting with a focus on collaborative efforts moving forward. They hope to see more shared CTE programs between districts and increased opportunities for collaboration between high schools and colleges.

Chair Dyson was pleased to see the new board members join the 4th of July parade by marching alongside our city council members and state representatives.

10. Hear Public Comments (*The Ashland School District Board of Directors reserves this time for individuals to relay comments in writing to the Board regarding topics, not on the printed agenda.*)

Ann Gaffney expressed her concerns about our school board election process. The current system of running for a specific seat creates challenges with politicking. She suggests the board consider switching to an open seat method, where those with the highest total votes fill the available seats. The school district has the authority to define its election process.

11. OSBA Representative for Southern Oregon

Southern Oregon OSBA Representative Dawn Watson introduced herself to the board and shared her role as the state's representative for Southern Oregon. Dawn represents Jackson and Josephine Counties. Her duties include serving as the OSBA liaison for our region, notifying board members about legislative action opportunities and other important information. She also leads the regional round table forum at the OSBA conferences and assists with the fall regional meetings each October. She may host a legislative reception in January. Dawn is a resource for any board member who has questions. She encouraged board members to attend the Summer Board Conference. At the conference, she encouraged members to attend the OSBA Legislative Policy Committee Meeting, the Oregon Rural School Board Members Caucus Meeting, the Oregon School Board Members of Color Caucus Meeting, and the LGBTQIA2S+ Advisory Committee Meeting. The website OSBA.org/new-board-members offers a wealth of resources for both new and experienced board members.

12. Superintendent Report

Superintendent Joseph Hattrick announced that Dr. Francisco L. Atanes has been appointed as interim principal at AHS, and Susan Hollandsworth will serve as the interim principal at Helman for the 2025-26 school year. The district will launch a comprehensive principal search for both schools during the second semester of the school year.

Dr. Hattrick reported that on June 30, the Federal Government notified the states it would withhold billions of dollars in federal education funding for teacher training, after-school programs, and services for English learners and migrants. The affected funds include Title II-A, Title IV-A, Title I-C, Title III-A, and Title IV-B. This could potentially mean that ASD might not receive \$150,000 in funding, which could lead to more cuts to teachers and programs. Dr. Hattrick emphasized this call to action—contact your members of Congress and urge them to request the immediate release of these funds.

Governor Tina Kotek issued Executive Order 25-09, which requires all K- 12 public schools in Oregon to ban the use of personal electronic devices during the school day. All districts must adopt policies in line with this order by October 31, 2025, and fully implement them by January 1, 2026. ASD already has Policy JFCEB in place, which will need to be reviewed and updated to align with the new standards, for which we are waiting for guidance from ODE and OSBA.

The Summer Meal Program runs from June 9 to August 15. Free breakfasts and lunches are served daily at Bellview and AMS.

Summer priorities at the District Office include:

- Improving processes and guidance for field trips, clubs versus sports, transportation guidance, professional development, handbooks, clarity on roles and responsibilities
- Identifying policies for review
- Continuing the stabilization process to reduce confusion and build trust

Dr. Hatrick announced the following upcoming events:

- Tuesday, July 22 at noon, Peace Ceremony at Lithia Park Bandshell
- Tuesday, July 22 at 5:00 pm, Kitchell Games at Walter A. Phillips Field (aka AHS Turf Field)
- Friday, July 25 at 6:30 pm, Pregame Ceremony at Walter A. Phillips Field
- Friday, July 25 at 7:00 pm, Pacific Rim Bowl at Walter A. Phillips Field, \$10 for general admission, \$5 for students with ID

13. Finance Report

13.A. Finance Report for the period ending June 30, 2025

Director of Business Services Sherry Ely reported an ending fund balance of \$1.7 million for the 2024-25 school year. This is mainly due to the \$2.7 million the district saved in expenses through a spending freeze, furlough days, and realistic projections. Revenue sources remain stable, so no revenue increases are expected for FY25. Overall, this is positive news as ASD moves toward a balanced budget.

Director Ely also noted that when she joined the district in February 2025, the District was facing a possible \$10 million cash flow shortfall. It is a strong testament to the dedication and hard work of the District staff that the District might only need to use \$5.12 million of the authorized \$10 million loan.

14. Unfinished Business

None

15. New Business

None

16. Announcements and Appointments

Chair Dyson announced the upcoming board events and meetings.

17. Adjourn

There being no further discussion, Chair Dyson adjourned the meeting at 7:56 PM.

Submitted by:
Holly Rosser, Board Secretary

Date for Board Approval: August 14, 2025

Minutes

I. **Call to Order / Roll Check**

Board Chair Rebecca Dyson called the meeting to order at 9 AM and roll check confirmed that all members were present: Dyson, Ruby, Rooklyn, Ferguson, and Hatch.

II. **Review and Approve Agenda**

- ❖ **Motion:** Vice Chair Hatch moved and Director Ruby seconded adoption of the agenda as written. The motion carried by unanimous vote of the five members present.

III. **Board Roles and Responsibilities**

OSBA School Board Trainer, Vince Adams, led the board training for the day.

In a group activity, the board came up with a list of their top strengths:

- Alignment with community
- Team of problem solvers
- Diverse Board
- Respectful
- Kid-centric
- Committed
- Shared values

Top areas of growth:

- Bias aware
- Listening and learning
- Young board (institutional knowledge)
- Need to build trust
- Learn to stay in lane
- Knowing what questions to ask
 - Finance
 - Education
- Work together as a leadership team

The success of a student may include any of the following:

- Graduation
- GED
- becoming independent
- plan for post-secondary life

Training and discussion of the following topics:

- Informed Oversight
- Twelve Standards of a Balanced Governance
- Using Data
- Public Complaints
- Public Comments

IV. **Lunch Break**

V. **Communications Protocols**

Training and discussion of the following topics:

- Making an information request (Policy BBAA)
- Board-Supt Communication Protocol
- Communication with Board Secretary

- Communication with District Staff
- Board-to-Board Communication

VI. Direction/ Planning/ Priorities / Goals

Training and discussion of the Board's Role in setting the strategic direction. Topics included:

- Policy AE District Goals
- Portrait of a graduate
- Strategic Direction (the why and the what)—Board responsibility
- Strategic Plan (the how)—Superintendent/Staff responsibility
- Identify/ Alignment/ Monitor
- Superintendent Goals
- Board Goals
- District Goals
- Monitoring Systems/ Feedback loops

VII. Adjourn

There being no further discussion, Chair Dyson adjourned the meeting at 3:55 PM.

Submitted by:
Holly Rosser, Board Secretary

Date for Board Approval: August 14, 2025

Minutes

I. Call to Order / Roll Check

Board Chair Rebecca Dyson called the meeting to order at 9:02 AM and roll check confirmed that all members were present: Dyson, Ruby, Rooklyn, Ferguson, and Hatch.

II. Review and Approve Agenda

- ❖ **Motion:** Vice Chair Hatch moved and Director Ruby seconded adoption of the agenda as written. The motion carried by unanimous vote of the five members present.

III. Team Development

Superintendent Hattrick led the training and discussions for the second day of the board retreat. Reflecting on the training with Vince Adams, the board noted that they would like to work on the following:

- Acronyms
- Robert's Rules of Order
- Better understanding of changes happening at school sites
- Central events calendar/ school newsletters

Board members are invited to the Welcome Back Event for staff on August 21.

IV. Operating Agreements

Superintendent Hattrick and the board collaborated on creating a draft version of the 2025-26 Board-Superintendent Operating Agreements.

V. Evaluations

The Superintendent presented a proposed evaluation plan and process that will be submitted for approval at the August board meeting. The board established a timeline and plan for their self-evaluation.

VI. Goals

Using the 2025-27 Integrated Guidance Plan as a guideline, the board collaborated on drafting the Board Goals for the 2025-26 school year. Dr. Hattrick will align the Superintendent's goals with both the district's and the board's goals and present them to the board.

VII. Lunch Break

VIII. Legislative Updates

- SB 732 District Equity Committee
- AI
- Cell phones
- Federal Funding
- National Voucher System

IX. Administrative Items

- Proposed Board meeting schedule
- Statement of Economic Interest
 - Annual report due April 15th
- Volunteer/ Background checks
 - All volunteers must complete an application and consent to a background check
 - www.ashland.k12.or.us/page/volunteer-in-the-schools
- SafeSchools Training for board members
 - Mandatory Reporting
 - Cybersecurity
- Potential Board appointments
 - Legislative Rep- Russell
 - ASF- Dan
 - YAAL- Dan with Jordan
- Foundations of Equity Training, Friday, August 15, AMS Library, 8:00-4:00

X. Policy Process

Superintendent Hattrick reviewed the previous process and proposed the following process:

- Create a policy workgroup to review/revise policies with the Superintendent and Board Secretary
- Focus would be on OSBA Policy Updates
- Urgent policies may be brought straight to the board for consideration and approval by the Superintendent
- Revised policies would be included in the consent agenda for first read and second read.
- Hot topic policies would be placed as an action item on the regular session agenda.
- This would free up work sessions to focus on other topics
- Board will need to approve this process at a regular meeting

XI. Policy Review

Superintendent Hattrick conducted a review of policies section A/B.

XII. Open Brainstorm

Board interest list:

- Facilities Plan
- Use of district-owned lands
- Surplus property
- Increase data review at work sessions
- Tracking non-enrolled students at our district
- Portrait of a graduate
- Collaborating with others/ community partners
- Periodic Community partner reports
 - La Clinica
 - YMCA
 - PreK
 - SOU
 - Ashland Parks and Rec

Review of board member reimbursement process:

- Best practice is to request purchases directly through district office
- Board members get a parking pass
- Board members get a district badge
- Board members do not get a Pcard
- District will cover travel expenses
- District vehicle is available to be checked out

Professional Development

- Superintendent Hattrick will create a recommended book list. The board is encouraged to select one to review on their own time as self-study.
- Board requested a presentation on the use of AI in the classrooms

XIII. Adjourn

There being no further discussion, Chair Dyson adjourned the meeting at 3:40 PM.

Submitted by:
Holly Rosser, Board Secretary

Date for Board Approval: August 14, 2025

Ashland School District
Board Personnel Report
August 1, 2025

SITE	NAME	POSITION	STATUS	STATUS CHANGE	SALARY PLACEMENT EXCEPTION
AHS	Ashley Caughell	Assistant Athletic Director- Summer	Temporary Service	NO	NONE
AHS	James Hagemann	Teacher, PE	1.0 FTE	NO	NONE
AHS	Jamie Hirsh	Fresh Start Teacher	Temporary Service	NO	NONE
AHS	Alan Parowski	Fresh Start Teacher	Temporary Service	NO	NONE
AHS	Christopher Reed Sorensen	Fresh Start Teacher	Temporary Service	NO	NONE
AHS	Maximiliano Malcomb	Fresh Start Teacher	Temporary Service	NO	NONE
AHS	Tyvauntae Deloney	Fresh Start Teacher	Temporary Service	NO	NONE
AHS	Nehemiah Dedmon	Fresh Start Teacher	Temporary Service	NO	NONE
AHS	Abdi Guled	Fresh Start Teacher	Temporary Service	NO	NONE
AHS	Sarah Weston	Fresh Start Teacher	Temporary Service	NO	NONE
AHS	Emily Pew	Fresh Start Teacher	Temporary Service	NO	NONE
AHS	Jannet Micket	Fresh Start- 1 to 1 Student Support	Temporary Service	NO	NONE
AHS	Erin Hope	Fresh Start Nurse	Temporary Service	NO	NONE

Ashland School District
 Board Personnel Report
 August 1, 2025

AHS	Meranda Schaffer	EA Site Based	0.875 FTE	NO	NONE
AHS	Piper Banks	Grey Shirt Fresh Start	Temporary Service	NO	NONE
AHS	Azaleah Davis-Powell	Grey Shirt Fresh Start	Temporary Service	NO	NONE
AHS	Aiden Espinoza	Grey Shirt Fresh Start	Temporary Service	NO	NONE
AHS	Rosa Gutrich	Grey Shirt Fresh Start	Temporary Service	NO	NONE
AHS	Zahara Hernandez	Grey Shirt Fresh Start	Temporary Service	NO	NONE
AHS	Sara Anne Siegel	Grey Shirt Fresh Start	Temporary Service	NO	NONE
AHS	Kiera Retiz	Grey Shirt Fresh Start	Temporary Service	NO	NONE
AHS	Rebecca Bjornson	Assistant Principal	1.0 FTE (Temporary)	NO	NONE
AHS	Rebecca Bjornson	Teacher, SPED	Resignation	NO	NONE
AHS	Adam Harris	Teacher, Band	Decreased to 0.83 FTE	NO	NONE
AHS	Lauren Trolley	Teacher, Orchestra	Decreased to 0.47 FTE	NO	NONE
AHS	Angela Johnson	Teacher, PE	1.0 FTE	NO	NONE
AHS	Audrey Bowley	Teacher, SPED	1.0 FTE	NO	NONE
AHS	Rebecca Cate	Teacher, Math	1.0 FTE	NO	NONE

Ashland School District
 Board Personnel Report
 August 1, 2025

AHS	Daren Shaw	Teacher, Science	0.50 FTE	NO	NONE
AHS	Rebecca DeSalvo	Teacher, Science	1.0 FTE	NO	NONE
AHS	Abdi Guled	Head Coach, Boys Soccer	Temporary Service	NO	NONE
AHS	Marie Caballero Uhtoff	Head Coach, Girls Soccer	Temporary Service	NO	NONE
AHS	Karl Pryor	Head Coach, Cross Country	Temporary Service	NO	NONE
AHS	Tia Khachiphet	Head Coach, Volleyball	Temporary Service	NO	NONE
AHS	Ashley Caughell	Cheerleade Advisor- Fall	Temporary Service	NO	NONE
AHS	Maximiliano Malcomb	Assistant Coach, Boys Soccer	Temporary Service	NO	NONE
AHS	Kaikoo Micah Victor	Assistant Coach, Boys Soccer	Temporary Service	NO	NONE
AHS	Sergio Urena	Assistant Coach, Boys Soccer	Temporary Service	NO	NONE
AHS	Jose Soriano	Assistant Coach, Football	Temporary Service	NO	NONE
AHS	Greg White	Head Coach, Football	Temporary Service	NO	NONE
AHS	Ethan Arlt	Assistant Coach, Volleyball	Temporary Service	NO	NONE
AHS	Jeff Kubiak	Assistant Coach, Volleyball	Temporary Service	NO	NONE
AHS	Cassie Jensen	Assistant Coach, Volleyball	Temporary Service	NO	NONE

Ashland School District
 Board Personnel Report
 August 1, 2025

AHS	Clare Taylor	Assistant Coach, Cross Country	Temporary Service	NO	NONE
AHS	Nehemiah Dedmon	Assistant Coach, Football	Temporary Service	NO	NONE
AHS	Kathleen Martin	Teacher, Spanish/ELD	1.0 FTE (Temporary)	NO	NONE
AHS	Laura Roennfeldt	Assistant Coach, Girls Soccer	Temporary Service	NO	NONE
AHS	Allie Nicole Radniecki	Assistant Coach, Girls Soccer	Temporary Service	NO	NONE
AHS	Stacy Nichole Hamer	Assistant Coach, Girls Soccer (0.50)	Temporary Service	NO	NONE
AHS	Robert Joseph Levorse	Assistant Coach, Football	Temporary Service	NO	NONE
AHS	Timothy J Hernandez	Assistant Coach, Football	Temporary Service	NO	NONE
AHS	Austin Douglas Brower	Assistant Coach, Football	Temporary Service	NO	NONE
AHS	Keri Green	Teacher, Site Based	1.0 FTE	NO	NONE
AHS	Johnthan Weigher	Teacher, Humanities	1.0 FTE	NO	NONE
AHS	Toni Wright	Teacher, Humanities	1.0 FTE	NO	NONE
AHS	Amy Maukonen	Teacher, SPED	0.30 FTE (Temporary)	NO	NONE
Student Services	Timothy Jaramillo	Teacher, Site Based	1.0 FTE (Temporary)	NO	NONE
Student Services	Britt Humphrey	Behavioral Health Specialist	Decreased to 0.30 FTE	NO	NONE

Ashland School District
Board Personnel Report
August 1, 2025

Student Services	Matthew Hartt	School Psychologist	1.0 FTE	NO	NONE
Student Services	Paige Galpin	Teacher, SPED Coordinator TOSA	0.60 FTE	NO	NONE
Maintenance	Eric Gilcrease	Custodian	Resignation	NO	NONE
Helman	Jeffrey Mann	Teacher, Reading	1.0 FTE (Temporary)	NO	NONE
Helman	Kari Smith	Summer School Teacher	Temporary Service	NO	NONE
Helman	Karen Tkaczyk-Turner	Summer School Teacher	Temporary Service	NO	NONE
Helman	Robin Bayouth	Summer School EA	Temporary Service	NO	NONE
Helman	Julianna Barreto	Summer School EA	Temporary Service	NO	NONE
Helman	Sally Ehrman	EA	0.50 FTE	NO	NONE
Helman	Steve Schmitt	Teacher, Site Based	1.0 FTE	NO	NONE
Helman	Nathaniel Suter	Teacher, PE	0.60 FTE	NO	NONE
Food Service	Gina M Esposito	Maint I Food Service	Resignation	NO	NONE
Food Service	Ishmael Lateef Thomas	Food Service Worker	Resignation	NO	NONE
Technology	Mark Morrison	IT Support Specialist I	Resignation	NO	NONE
Technology	Shahid Ali	Network Engineer III	Resignation	NO	NONE
Bellview	Sally Ehrman	EA	Decreased to 0.50 FTE	NO	NONE
Bellview	Weatherly Oakes	EA	Resignation	NO	NONE
Bellview	Randi Nash	Teacher, Kindergarten	1.0 FTE	NO	NONE
Bellview	Kathy Olson	EA	0.8438 FTE	NO	NONE
Bellview	Courtney Scott	EA SPED I	Decreased to 0.75 FTE	NO	NONE

Ashland School District
Board Personnel Report
August 1, 2025

Bellview	Kathryn Brimmer	CDS	1.0 FTE	NO	NONE
Bellview	Jesse Russell	Teacher, Music	0.60 FTE	NO	NONE
TRAILS	Jenifer Carstensen	Teacher, Music	0.06 FTE	NO	NONE
TRAILS	Lance Matthewson	Teacher, PE	0.36 FTE (Temporary)	NO	NONE
TRAILS	Amy Maukonen	Teacher, Math Intervention	0.20 FTE	NO	NONE
TRAILS	Rocio Ramos Rojas	EA	0.4688 FTE	NO	NONE
District Office	Steven Mitzel	Bond Stipend	Temporary Service	NO	NONE
District Office	Robby Moles	Bond Stipend	Temporary Service	NO	NONE
District Office	Emaryia Adams	Administrative Assistant	1.0 FTE	NO	NONE
District Office	Jennifer Bein	Wellness Coordinator	Temporary Service	NO	NONE
AMS	Lauren Trolley	Teacher, Orchestra	Increased to 0.53 FTE	NO	NONE
AMS	Jarrett Davidson	Teacher, Art	Increased to 0.59 FTE	NO	NONE
AMS	Jenifer Carstensen	Teacher, Band	Decreased to 0.47 FTE	NO	NONE
AMS	Allen Lambert	Teacher, ESL	Increased to 0.30 FTE	NO	NONE
AMS	Allen Lambert	Teacher, Leadership/Homeroom	Increased to 0.70 FTE	NO	NONE
AMS	Lance Matthewson	CDS	Resignation	NO	NONE
AMS	Lance Matthewson	Teacher, PE	0.19 FTE (Temporary)	NO	NONE
AMS	Christopher Daley	Teacher, PE	0.50 FTE (Temporary)	NO	NONE
AMS	Azriel Wolffe	Teacher, 7/8 Math	1.0 FTE (Temporary)	NO	NONE
AMS	Gregory John Grano	Teacher, WAMS (Journalism)	0.60 FTE (Temporary)	NO	NONE
AMS	Alissa Lipking	EA	0.6875 FTE	NO	NONE
AMS	Andrea Royse	Teacher, Humanities	Decreased to 0.50 FTE	NO	NONE
AMS	Katri Boyd	EA	Decreased to 0.6875 FTE	NO	NONE

Ashland School District
Board Personnel Report
August 1, 2025

AMS	James Johnson	EA	0.8125 FTE	NO	NONE
AMS				NO	NONE
AMS	Matt Dierks	Assistant Coach, Football	Temporary Service	NO	NONE
AMS	William Beckett	Volleyball Coach	Temporary Service	NO	NONE
AMS	Tara Elder-Hammond	Volleyball Coach	Temporary Service	NO	NONE
AMS	Jacob Holderman	Volleyball Coach	Temporary Service	NO	NONE
AMS	Gregory John Grano	Yearbook Advisor	Temporary Service	NO	NONE
AMS	Quin Haldane	Head Coach, Football	Temporary Service	NO	NONE
AMS	Christie Lawson	Assistant Coach, Cross Country	Temporary Service	NO	NONE
AMS	Austin Wallace	Head Coach, Cross Country	Temporary Service	NO	NONE
AMS	Christopher Daley	Athletic Director	Temporary Service	NO	NONE
AMS	Ashley Ambrosio	Assistant Coach, Cross Country	Temporary Service	NO	NONE
AMS	Derek Snyder	EA	0.50 FTE	NO	NONE
Willow Wind	Vernon Lee Pew	Part Time Instructor	Temporary Service	NO	NONE
Willow Wind	Dana Yearley	Part Time Instructor	Temporary Service	NO	NONE
Willow Wind	Abigail Kruenegel	Part Time Instructor	Temporary Service	NO	NONE
Willow Wind	Eping Hung	Part Time Instructor	Temporary Service	NO	NONE
Willow Wind	Chrsitinia Hoffman	Part Time Instructor	Temporary Service	NO	NONE
Willow Wind	Katherine Chew	Part Time Instructor	Temporary Service	NO	NONE
Willow Wind	Stacy Bloodworth	Youth Advocate	Increased to 0.75 FTE	NO	NONE
Willow Wind	Britt Humphrey	CDS	Increased to 0.70 FTE	NO	NONE
Willow Wind	Megan Collins	EA	0.4375 FTE	NO	NONE
Willow Wind	Skylar Suste	EA SPED II	0.75 FTE	NO	NONE
Willow Wind	Quinn Courtright	EA	0.75 FTE	NO	NONE
Willow Wind	James Hetland	Teacher, Grade 2	0.75 FTE	NO	NONE

Ashland School District
 Board Personnel Report
 August 1, 2025

Walker	Weatherly Oakes	EA Media Assistant	0.625 FTE	NO	NONE
Walker	Janet Ell	EA	0.8438 FTE	NO	NONE
Walker	Brittany Neumann	EA	Decreased to 0.8438 FTE	NO	NONE
Walker	Debra Laird	EA SPED I	0.75 FTE	NO	NONE
Transporation	Peter Stone	Maint Worker I	Resignation	NO	NONE
Transporation	Charity May Armas-Siles	Maint Worker I	0.25 FTE	NO	NONE
Transporation	Benjamin Carder	Bus Driver	Increased to 0.5626 FTE	NO	NONE

BOARD MEETING SCHEDULING FOR 2025-2026: SECOND AND FOURTH THURSDAY of EACH MONTH

NOTE: Except for a few exceptions, Regular Sessions will take place at 6:30 PM on the second Thursday of each month, and Work Sessions will be held on the fourth Thursday.

Board Meeting Schedule for July 2025 - June 2026	
July-December 2025	
Thursday, July 10- Regular Session	City Council Chamber
No Work Session	n/a
Mon/Tues, July 28 & 29 – Board Retreat	District Office
Thursday, August 14- Regular Session	City Council Chamber
Thursday, August 28- Work Session	Zoom
Thursday, September 11- Regular Session	City Council Chamber
Thursday, September 25- Work Session	n/a (conflicts with Equity Summit)
Thursday, October 9- Regular Session	City Council Chamber
Thursday, October 23- Work Session	Zoom
Thursday, November 13- Regular Session	City Council Chamber
Thursday, November 20- Work Session	Zoom (3 rd Thursday – Thanksgiving falls on 4 th Thursday)
Thursday, December 11- Regular Session	City Council Chamber
No Work Session (Winter Break)	n/a
January-June 2026	
Thursday, January 8- Regular Session	City Council Chamber
Thursday, January 22- Work Session	Zoom
Thursday, February 5- Regular Session	City Council Chamber (1 st Thursday due to AASA conference)
Thursday, February 26- Work Session	Zoom
Thursday, March 12- Regular Session	City Council Chamber
Thursday, March 19- Work Session	Zoom (3 rd Thursday- spring break falls on 4 th Thursday)
Thursday, April 9- Regular Session	City Council Chamber
Thursday, April 23- Work Session	Zoom
Thursday, May 14- Regular Session	City Council Chamber
Thursday, May 28- Work Session	Zoom
Thursday, June 11- Regular Session	City Council Chamber
No Work Session Scheduled	n/a

As of 8.14.2025

Superintendent Evaluation Process & Timeline

FIVE-PART EVALUATION TOOL

The Oregon School Boards Association (OSBA) and the Coalition of Oregon School Administrators (COSA) have developed a five-part tool for evaluating superintendents.

PART 1 SUPERINTENDENT PERFORMANCE STANDARDS.

These are based on the Professional Standards for Educational Leaders (PSEL, 2015) and District Level National Educational Leadership Preparation Standards (NELP, 2018) and augmented by standards jointly developed by COSA and OSBA.

PART 2 SUPERINTENDENT GOALS.

This section evaluates progress towards the superintendent's goals established by the board and superintendent at the beginning of the evaluation cycle.

PART 3 EVIDENCE OF PERFORMANCE.

This consists of the superintendent's self-evaluation and their regular reporting to the board on progress toward standards and goals. This area may be supported by artifacts or documents, specifically in those areas where the board may lack direct knowledge of the superintendent's performance.

PART 4 FEEDBACK ON PERFORMANCE.

This consists of a targeted feedback survey of the superintendent's performance by selected staff and members of the community that have frequent, consistent interactions with the superintendent.

PART 5 EVALUATION SUMMARY.

This is the summary of the evaluation the board writes to share its unified message with the superintendent and the public.

Evaluation Process (Dates subject to change)

- Evaluation process approved by board on August 14, 2025.
- Superintendent will meet with board chair two times per month to discuss happenings within the district.
- Superintendent will meet with board members [~1 time per month].
- Check-in meetings to review performance of superintendent (in executive session per ORS 192.660(2)(h)).
 - October 9, 2025 – *Also finalize targeted feedback survey process during this time.*
 - December 11, 2025
 - February 5, 2026
- Superintendent will present self-evaluation/goals update in executive session on March 12, 2026.
- Board reviews all information provided during March executive session.
- Board members complete the superintendent evaluation independently and meet in executive session on April 9, 2026 to finalize the evaluation.
- Board (or subcommittee) meets with Superintendent in Executive session or (if subcommittee) at a time convenient for all parties to provide the summary evaluation and constructive feedback.
- Board adopts a short narrative in open session on May 8, 2026 (step 5) and at the same meeting, determine if the board would like to extend the Superintendent's contract one year per contract.



Ashland School District #5

Board – Superintendent Operating Agreement

Purpose:

The Board of Directors is the educational policy making body for the Ashland School District. To effectively meet the system's challenges the School Board and Superintendent must function together as a leadership team. To ensure unity among team members, effective group agreements must be in place. The following are the group agreements for the Board and Superintendent.

Collaborative Governance:

1. Members of the Board and the Superintendent shall work together as a team; modeling lifelong learning and collaboration.
2. Members of the Board and the Superintendent shall mutually respect the others' role in policy/governance and in managing the school district and to direct employees in district and school matters, respectively.
3. Board members shall give careful consideration, listening to all perspectives, to all issues brought to the board by individuals and district leadership.
4. The Board shall make decisions only at properly called meetings. Board members recognize that individual members have no authority to take individual action in policy or district and school administrative matters, unless so authorized by board vote.

Communication Agreements:

1. Board members shall follow the chain-of-command and communicate directly with the Superintendent when a question arises, or a concern or complaint is voiced by a staff member, student, parent or community member.
2. Board Members shall communicate directly with the Superintendent or Board Chair prior to meetings of the board to address questions and concerns about agenda items.
3. When a Board member and/or the Superintendent has an individual concern, they shall communicate one-on-one with any member of the board-superintendent team as appropriate starting at the lowest possible level at the earliest opportunity. Concerns should be escalated to the board chair and/or OSBA for support if not resolved.
4. Support decisions of the majority. Once a decision is made, members will support the decision of the majority.
5. Be mindful that you represent the board in public and that communication should remain positive about the district/board and that no individual board member has the authority to speak for the board without specific approval by the board.

Agreed Upon Communication Protocol:

1. Communication between board members and superintendent will be respectful, timely, honest, direct, and appropriate.
2. Superintendent will communicate to board members regularly through weekly emailed reports when one has not been presented in-person during the same week and through in-person monthly meetings (1:1 or 2:1).
3. Board members should contact superintendent with questions or when topics come up through email, text, or phone. If urgent, text before a cold call to ensure availability. When possible, limit calls/texts to M-F 7AM-8PM.
4. In an emergency the superintendent will limit communication to the Board Chair who will communicate with the board. Detailed communication will follow the incident.
5. The board will use text communication for logistical and informational purposes only and should exercise caution.

Collective Commitments to:

1. Respectful interactions.
2. Learning together.
3. The understanding that we are all human, we WILL make mistakes, should welcome feedback when we do, and use feedback to grow.
4. Filter decisions through the lens of vision, mission, and what is in the best interests of our students.
5. Avoid surprises at board meetings and in board business.
6. Having fun.

2025-2026 Board Expectations of the Superintendent:

1. Provide data to the board members so that data driven decisions can be made.
2. Distribute appropriate information to all board members.
3. Communicate with board members promptly and effectively.
4. Represent the school district by being visible in the community.
5. Provide follow-up information to board members on concerns and issues they have referred to the Superintendent - close the communication loop.

2025-2026 Superintendent's Expectations of the Board:

1. Integrity of the highest order.
2. Recognition of the superintendent as the educational leader of the school district.
3. An effort to foster unity, harmony and open communications within the board.
4. Arrive at board meeting fully prepared to conduct district business.
5. Willingness to abide by its own rules, policies and code of ethical conduct.

Approved by the board on _____ with a _____ vote.

ASHLAND PUBLIC SCHOOLS

JACKSON COUNTY SCHOOL DISTRICT #5

Dr. Joseph Hattrick
Superintendent



Inspire Learning for Life

BOARD OF DIRECTORS

REBECCA DYSON

RUSSELL HATCH

DANIEL RUBY

DELTRA FERGUSON

JORDAN ROOKLYN

MICHELLE CUDDEBACK
Assistant Superintendent

STEVE MITZEL
Executive Director, Operations

SHERRY ELY
Director, Business Services

APRIL HARRISON
Director, Student Services

ASD Policy Review Process

Ashland School District Policies will be reviewed, revised, and adopted in accordance with policy [BFC](#).

In an effort to provide an expedited process with board representation, a Superintendent Advisory Policy Workgroup will be established that will include two board members, the Superintendent, and the Board Secretary.

The workgroup will meet every other month to review policies that have been recommended for revision by OSBA and/or by district staff. The workgroup will consider policies in need of revision and make recommendations to the Superintendent.

The Superintendent will use information gained during workgroup meetings to place policy revision recommendations on an upcoming consent board agenda for “first read”. It is the responsibility of board members to review the recommended revisions prior to the board meeting. Any suggested revisions can be sent via email to the Superintendent prior to the board meeting, or a policy can be pulled for discussion during a board meeting.

Between the first read and the next board meeting, feedback can be received by the Superintendent from board members and/or the public, which can be applied to policy and reflected in the policy when it is placed on the next regular agenda for “second read,” at which point it can be considered for formal adoption.

Memorandum of Understanding (MOU)

July 1, 2025-June 30, 2026

This Memorandum of Understanding is between the Ashland Family YMCA (YMCA) and the Ashland School District 5 (DISTRICT). This MOU is established as a formal partnership for the operations of preschool to be provided at Helman Elementary School and Walker Elementary School.

History: The YMCA and DISTRICT both exist to serve youth and families. The DISTRICT and YMCA have enjoyed a collaborative relationship for many years. Activities and services that have been and continue to be provided in partnership include preschool, afterschool care, youth sports, and other sports, trainings, and interventions based on the needs of the community.

The YMCA is responsible for:

- Providing all-day licensed pre-school programming at Walker and Helman Elementary Schools.
- The YMCA will provide a certificate of insurance to the DISTRICT covering all activities provided.
- The YMCA will provide a copy of licensure to the DISTRICT covering all activities provided.
- Repair all damage to DISTRICT building, contents, and/or grounds caused by the YMCA programs.
- Leave all DISTRICT facilities in a clean, tidy, and orderly manner.
- Checking-in all keys provided by the DISTRICT at the end of each school year for auditing purposes. If summer programs are being offered, those keys will be made available once they have been checked-in. The YMCA will reimburse the School District for any lost keys.
- YMCA staff will not leave YMCA registered children unattended on DISTRICT premises.
- Knowing and enforcing the DISTRICT rules, in addition to notifying the school Principal when there are YMCA program orientations for parents and children. School staff are welcome to attend these events at their discretion.
- Providing all materials and instruction if required in Spanish.
- Assisting families in accessing financial assistance opportunities.
- Providing YMCA program equipment. DISTRICT equipment may be used only with Principal's written permission.
- Working in good faith and partnership to best provide care and enrichment opportunities for the students and families in mutual service region.

The SCHOOL is responsible for:

- Recognizing the YMCA as a non-profit organization and classifying as a "non-profit group" on the priority order for community organizations using the DISTRICT sites.
- Providing keys and security codes to the YMCA when requested to ensure access for provision of services, licensing and preparation activities. In addition, the DISTRICT will provide the YMCA a copy of each schools' rules and handbook in which they operate.

- Consider the YMCA when planning after-school, sports or other enrichment activities during the school year, or during the summer.
- Allowing access to facilities identified to serve the YMCA pre-school for school's out days and summer programming to ensure consistent service for families with proper planning for security and coverage.
- Providing school custodians to perform normal maintenance. The DISTRICT "cleans" the school site while the YMCA keeps it "tidy" including sweeping and dust mopping, and any other repairs to the facility.
- Deep clean facilities in which YMCA uses. This will require two full days of uninterrupted access between the end of the school year and the end of July for cleaning.

The YMCA and DISTRICT agree to:

- Hold regular check-in meetings throughout the duration of this MOU.
- Check-in meetings should be held monthly with school staff and principal to:
 - Review program operations, facility use, and any challenges or successes.
 - Assess student and family needs and discuss any necessary program adjustments.
 - Address any maintenance, safety, or security concerns.
 - Provide an opportunity to align goals and strengthen collaboration between both organizations.
 - Be scheduled at mutually convenient times.
- Include School District Superintendent and YMCA CEO in a bi-annual check-in meeting.
- Additionally, the partnership and this MOU will be reviewed **six months prior to its expiration** to ensure continued alignment with both parties' goals.

FEES

The YMCA and DISTRICT have agreed that the best partnerships are mutually beneficial and therefore, the DISTRICT will provide the use of Walker and Helman classrooms for preschool at no charge. Additionally, a designated space at Bellview, Walker, and Helman for after-school care will be provided at no charge by the DISTRICT. The YMCA will allow the DISTRICT the use of Camp DeBoer for Fresh Start and Staff Inservice (1 day) at no cost to the DISTRICT).

In closing, the YMCA and the Ashland School District will work in partnership to provide for the early learning and care experience for pre-school ages and for afterschool care for children in grades k-5 and will seek other partnership areas as well including activities at Camp DeBoer when possible. It is understood that either party may terminate this MOU and the current agreement with a 6-month written notice, and this MOU will be revisited six months prior to its' expiration.

Joseph Hattrick
School District Superintendent

Heidi Hill
YMCA CEO



AHS Science Building Revealing New Concrete, Siding, Soffit and Structural Upgrades!



ASHLAND SCHOOL DISTRICT CAPITAL BOND PROGRAM

END OF MONTH REPORT – JULY 2025



GENERAL PROGRAM UPDATE

The magnitude of improvements to the Ashland High School Campus in these brief summer months is astonishing. Closeout of the Modernization Project including completion of the Gym chiller install has progressed significantly. The bulk of structural modification associated with the Science Building Seismic Retrofit are complete and the Quad Renovation is proving to develop into the flagship project of the Ashland High School campus.

Simultaneous completion of the Modernization Project, Science Building Seismic Retrofit and Quad Renovation will conclude construction on the Ashland High School Campus. Several construction zones have already been turned over to the District for occupancy and the remainder are scheduled to be complete the second week of August, allowing staff time to settle back into their classrooms and common areas.

PROJECT ADMINISTRATION

Project administration and accounting support are two key areas critical to Program success. This is a combined effort of HMK Company and ASD Accounting Department. In the month of July, we requested 1 purchase order and processed 9 invoices.

Contract Type	Number of Contracts	Value
Professional Service Agreements / Design Contracts	--	\$ 22,755,464
Construction Contracts	1	\$ 107,635,484



LOCAL VENDORS AND CONTRACTORS

The following list of local vendors are currently working on the projects.

ASHLAND AREA VENDORS and CONTRACTORS

- | | |
|---------------------------------------|----------------------------|
| Arkitek:design&architecture | Adroit Construction Co. |
| Ciota Engineering | DOBRIN |
| Covey Pardee Landscape Architecture | Infinity Electric |
| Douglas Engineering Pacific | Van Row Mechanical |
| HMK Company | Cascade Communications |
| KenCairn Landscape Architecture | Quality Fence |
| Bean Electric | Pacific 3D Reality Capture |
| Renfro | Welburn Electric |
| Pariani Land Surveying | Britannia |
| Powell Engineering | Patriot Landscaping |
| ZCS Engineering & Architecture | Sandeem Masonry |
| Beflor | Alco |
| Top Notch | Quality Fence |
| Sandeem Masonry | S&S Sheetmetal |
| Metal Masters | Urban Racks |
| Moore Construction | Curtis Huntley |
| Devry | Cut N' Break |
| Precision Electric | Advanced Air |
| Hall of Fame Movers | New Horizons Woodworks |
| Milestone Landscape Group | Viking Concrete Cutting |
| Figueroa's Landscaping & Construction | Artoff Construction |
| North Core Excavation | LLAD |
| Southern Oregon Painting Company | True South Solar |
| Pressure Point Roofing | |

Ashland Area, defined as Rogue Valley



ASHLAND MIDDLE SCHOOL & TRAILS

PROJECT ADDITION & RENOVATIONS TO EXISTING BUILDING

PROJECT DESCRIPTION

- New and renovated classroom space to replace 3 existing classroom wings, approx. 65,000 sq. ft.
- Campus security
- Air Quality improvements and Climate resilience for existing buildings, including new construction
- Required tech infrastructure

SCHEDULE & KEY MILESTONES	START	COMPLETION	% CPL	COMMENT
Pre-Design & Schematics	08/12/19	11/15/19	100%	
Design Development	12/09/19	02/28/20	100%	
Construction Documents	03/23/20	08/07/20	100%	
Bid and Award Site Package	10/27/20	11/02/20	100%	
Bid and Award Building Package	10/27/20	11/02/20	100%	
Construction	11/03/20	10/21/22	100%	
Substantial Completion	10/21/22	03/01/23	100%	
Owner Occupancy	08/24/22	10/31/22	100%	
Post Occupancy Evaluation	03/01/23	12/21/23	100%	
Warranty Period	03/01/23	03/01/24	100%	
Other			0%	

CURRENT ACTIVITIES

Ashland Middle School and TRAILS Outdoor School are complete, and staff and students are fully occupying the new spaces.

Throughout each campus, upgrades in HVAC systems, plumbing, and electrical are prevalent, introducing energy efficiency air quality improvements and climate resilience resulting in more accommodating environments for maximum learning opportunities. Each school has received upgraded windows, new roof systems, new restrooms and redesigned administrative/office spaces. The project also resulted in improvements to overall campus security, technology infrastructure, seismic upgrades and accessibility. Both schools have been retrofitted with fire alarm and fire suppression systems as well. Each school campus has its own vehicle entry and exit with clear-cut pick up and drop off areas to assist with reduced congestion during high traffic periods.



Ashland Middle School comprises about 40,000 sq. ft. of the project including a new library and addition of a newly constructed two-story 6th grade building with an elevator. The campus includes a leadership room with full kitchen designed to host campus events. The SPED area includes multiple classrooms and offices with an additional calming space, private restrooms, and secure outdoor learning area. The covered courtyard is central to the campus with a multifunctional design including reclaimed wood beam stadium style benches for outdoor educational purposes and skateboard accommodating features allowing students a safe and fresh outdoor space for various activities. The kitchen and cafeteria have also been upgraded with new appliances and renewed finishes.

TRAILS Outdoor School has an entirely separate, newly renovated building stretching across 26,000 sq. ft. of useable space. The campus now includes 5 classrooms, a library, art lab, testing room, SPED room, music facility and multi-purpose room. There is also a grand outdoor structure attached to the building, allowing activities in adverse weather, including an integrated rock-climbing wall. The multi-purpose room, also known as the community room, is the highlight of the building. This area not only provides a place for staff and students to congregate for events but is equipped with large windows and roll up doors that can be opened to connect to the outdoors. Designing this aspect of the multi-purpose room was fully intentional and a defining characteristic of the school culture. The adjacent ready room has a full kitchen, which accommodates preparation for outdoor activities as well as daily meal requirements.

ACTIVITIES SCHEDULED FOR NEXT PERIOD

- Warranty Work

ADDITIONAL INFORMATION

For questions, comments or additional information, please contact:

Josh Whitaker, Project Manager
josh.whitaker@hmkco.org
541.601.3638



PROJECT PHOTO GALLERY

Combined Ashland Middle School and TRAILS Outdoor School Campus





TRAILS Outdoor School





Ashland Middle School





HELMAN ELEMENTARY SCHOOL

PROJECT ADDITION & RENOVATIONS TO EXISTING BUILDING

PROJECT DESCRIPTION

- New secure classroom wing to replace 2 classroom pods, approx. 23,000 sq. ft.
- Campus security
- Includes District Wide HVAC improvements which includes Climate resilience for all buildings, rather than just new construction
- Required tech infrastructure upgrades

SCHEDULE & KEY MILESTONES	START	COMPLETION	% CPL	COMMENT
Pre-Design & Schematics	06/17/19	01/23/20	100%	
Design Development	02/01/20	04/30/20	100%	
Construction Documents	05/14/20	09/24/20	100%	
Bid and Award Site Package	09/04/20	10/16/20	100%	
Bid and Award Building Package	10/15/20	12/15/20	100%	
Construction	10/30/20	08/31/22	100%	
Building Commissioning	06/01/22	03/31/23	100%	
Substantial Completion	08/31/22	03/01/23	100%	
Owner Occupancy	08/23/22	08/24/22	100%	
Post Occupancy Evaluation	03/02/23	08/01/23	100%	
Warranty Period	03/01/23	03/01/24	100%	
Other			0%	

CURRENT ACTIVITIES

With the completion of this project, Helman Elementary School staff, students and community members are now able to fully utilize the renovated campus. The renovations included a brand new approximately 23,000 square foot classroom building to replace two of the existing quad buildings.



The construction of this building has a net reduction in the school's energy use that truly models the Ashland School District's adoption of the City of Ashland's Climate and Energy Action Plan (CEAP). The new classroom building also includes a SPED instructional space with exterior play area, sensory room with state-of-the-art furnishings, a large multipurpose room with an operable exterior wall and multiple breakout spaces scattered throughout the building.

The front administration area underwent a full renovation that included an access-controlled entry. New reception area, conference room and staff work room concluded the new spaces included in the administration area.

Campus wide, a new 4-Pipe hydronic HVAC system that includes new high efficiency boilers, new air handlers and a new chiller was installed. A new building controls system, allowing the district to operate the new systems as efficiently as possible and minimize any maintenance or troubleshooting delays, was also included. The campus also received a new fire alarm system bringing everything up to current building codes.

On the exterior of the site, a new entry drive was installed that will aid with traffic congestion during high traffic periods. Additional parking was installed at the south end of the campus. There is a brand new 1/8th mile walking track and new playground that is accessible to all. New landscaping wraps up the remainder of the campus.

ACTIVITIES SCHEDULED FOR NEXT PERIOD

- N/A

ADDITIONAL INFORMATION

For questions, comments, or additional information, please contact:

Mike Freeman, Project Manager
Mike.freeman@hmkco.org
541.499.7996



PROJECT PHOTO GALLERY

Completed Project





ASHLAND HIGH SCHOOL

PROJECT ASHLAND HIGH SCHOOL RENOVATION

PROJECT DESCRIPTION

- Improved accessibility and flexibility for the Humanities and Science Buildings.
- Repurpose or reconfigure existing spaces for science program requirements.
- Upgrades for air quality, security, restrooms, and technology infrastructure.
- Seismic rehabilitation at both Humanities and Science buildings

SCHEDULE & KEY MILESTONES	START	COMPLETION	% CPL	COMMENT
Pre-Design & Schematics	01/27/20	10/02/20	100%	
Design Development	10/02/20	01/29/21	100%	
Construction Documents	01/29/21	1/31/24	100%	
Permits, Bid and Award	05/31/23	3/29/24	100%	
Construction	06/16/23	12/31/24	99%	
Substantial Completion	12/31/24	12/31/24	95%	
Post Occupancy Evaluation	TBD	TBD	0%	
Warranty Period	TBD	TBD	0%	TBD
Other				

CURRENT ACTIVITIES

Closeout of the Modernization Project remains on schedule for August completion. Focus points through the month of July included resolution of punch items, installation of the Gym chiller system, owner demonstration and trainings as well as balancing and commissioning of mechanical systems.

The month of July was undoubtedly the most productive for the Science Building Seismic Retrofit and Quad Renovation. The majority of work has been completed with only a few items remaining to be closed out. Incomplete scopes of work are scheduled to be finished in the first two weeks of August. As of August 18th, efforts will be limited to punch work and the delayed install of the Quad sunshade due to lead time issues. The combined Seismic Retrofit and Quad Renovation project is proving to be an enormous improvement to the AHS campus that staff and students will enjoy for decades to come.



ACTIVITIES SCHEDULED FOR NEXT PERIOD

- Project completion

ADDITIONAL INFORMATION

For questions, comments, or additional information, please contact:

Josh Whitaker, Project Manager

josh.whitaker@hmkco.org

541.601.3638



PROJECT PHOTO GALLERY

New Concrete, Siding, Soffit and Structural Upgrades at the East Canopy





Pavers and Landscaping in the Quad





Additional Fencing to Further Secure Campus





WALKER ELEMENTARY SCHOOL

PROJECT ADDITION & RENOVATIONS PROJECT

PROJECT DESCRIPTION

- Comprehensive renovation and seismic improvement of historic Walker Elementary School main building and gymnasium
- Includes replacement of classroom wing, with new classrooms, redesigned entry, new finishes, doors, windows and roof
- Also, includes the district wide HVAC improvements

SCHEDULE & KEY MILESTONES	START	COMPLETION	% CPL	COMMENT
Pre-Design & Schematics	01/07/20	09/22/20	100%	Complete
Design Development	09/22/20	12/10/20	100%	Complete
Construction Documents	12/10/20	08/13/21	100%	Complete
Bid and Award	03/22/21	05/14/21	100%	Complete
Construction Documents Phase 2	10/18/20	11/16/21	100%	Complete
Bid and Award Phase 2	03/22/21	12/14/21	100%	Complete
Construction	07/17/21	04/17/23	100%	Complete
Building Commissioning	01/16/23	04/17/23	100%	Complete
Owner Occupancy	04/17/23	04/18/23	100%	Complete
Post Occupancy Evaluation	04/18/23	07/17/23	100%	Complete
Warranty Period	04/18/23	04/18/24	100%	Complete
Other			0%	

CURRENT ACTIVITIES

The Walker Elementary School renovation is now complete. This project brought much needed improvements to the existing Walker School that will provide the community with a state-of-the-art educational facility for many years to come. The older classroom annex was demolished in order to construct a new classroom wing that also allowed the front entrance to be relocated creating a much more intuitive office space. The historical wing of the building received structural upgrades by way of a state funded seismic grant. The entire classroom building received new finishes, upgraded energy efficient exterior envelope that included new windows and new furniture.

The renovation and addition has a net reduction in the school's energy use that truly models the Ashland School District's adoption of the City of Ashland's Climate and Energy Action Plan (CEAP). The



new addition also includes a SPED instructional space with exterior play area, sensory room with state-of-the-art furnishings, dedicated resource rooms and multiple breakout spaces scattered throughout the building.

Campus wide, a new 4-Pipe hydronic HVAC system that includes new high efficiency boilers, new air handlers and a new chiller was installed. A new building controls system, allowing the district to operate the new systems as efficiently as possible and minimize any maintenance or troubleshooting delays, was also included. The campus also received a new fire alarm system bringing everything up to current building codes.

The gym underwent a seismic upgrade making this building now rated to withstand a seismic event. In addition, it received a new roof and exterior paint as well as HVAC upgrades.

The exterior of the site underwent extensive renovations in order to improve campus security and student and automobile circulation. The parking area was extended, and the traffic flow was reconfigured to create a more cohesive format for pick up and drop off that eases congestion in the neighborhood and adjoining streets. The exterior was fenced creating a secure campus and the newly configured front entrance added access control in order to create a single point of entrance. A new fully accessible playground was installed as well. New landscaping wraps up the exterior improvements.

ACTIVITIES SCHEDULED FOR NEXT PERIOD

- N/A

HIGHLIGHTS, CHALLENGES, SOLUTIONS

HIGHLIGHTS:

- Project completion.

CHALLENGES:

- No current challenges to note.

ADDITIONAL INFORMATION

For questions, comments, or additional information, please contact:

Josh Whitaker, Project Manager

josh.whitaker@hmkco.org

541.601.3638



PROJECT PHOTO GALLERY

Aerial Photos of New Renovation and Addition







Placard Depicting the Seismic Upgrade through the Oregon Seismic Rehabilitation Grant





**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
DISTRICT WIDE ROLLUP BUDGET
JUNE 30, 2025**

Project Expense	Original Budget	Paid to Date	Remaining Balance	Revised Budget
Hard Cost				
Technology	\$ 3,420,000	\$ 3,912,847	\$ (513,623)	\$ 3,399,224
Restrooms	\$ 3,087,500	\$ -	\$ -	\$ -
Security	\$ 2,850,000	\$ 299,527	\$ 7,415	\$ 306,942
HVAC & MEP	\$ 13,569,000	\$ -	\$ -	\$ -
Transportation	\$ -	\$ 559,844	\$ 1	\$ 559,845
Bellview	\$ -	\$ 1,590,709	\$ 106,573	\$ 1,697,282
Maintenance	\$ -	\$ 676,982	\$ -	\$ 676,982
District Office	\$ -	\$ -	\$ -	\$ -
Asbestos Abatement	\$ 316,447	\$ -	\$ -	\$ -
Construction Contingency	\$ 1,348,640	\$ -	\$ 300,769	\$ 300,769
Construction Sub Total	\$ 24,591,587	\$ 7,039,909	\$ (98,865)	\$ 6,941,044
Soft Cost				
Administrative Cost				
Legal Fees	\$ 35,000	\$ -	\$ -	\$ -
Bond Counsel	\$ -	\$ -	\$ -	\$ -
Bond Issuance Cost	* \$ -	\$ -	\$ -	\$ -
Builders Risk Insurance	\$ -	\$ -	\$ -	\$ -
Project Management	\$ 733,063	\$ -	\$ -	\$ -
Reimbursable Expenses	** \$ 48,870	\$ -	\$ -	\$ -
Communications	\$ -	\$ -	\$ -	\$ -
Sustainability	\$ -	\$ -	\$ -	\$ -
Site Cost				
Site Survey	\$ 30,000	\$ 2,270	\$ 30,000	\$ 32,270
Geo-Tech Report	\$ -	\$ -	\$ -	\$ -
Planning Cost				
Design Fees	\$ 2,026,632	\$ 117,637	\$ 164,421	\$ 282,058
A & E Reimbursable Expenses	\$ 41,670	\$ -	\$ 10,000	\$ 10,000
Commissioning	\$ 145,267	\$ 183,995	\$ (15,995)	\$ 168,000
Printing & Plan Distribution	\$ 9,416	\$ -	\$ -	\$ -
Hazardous Materials Consultant	\$ 138,808	\$ 20,890	\$ 460	\$ 21,350
Construction Testing	\$ -	\$ -	\$ -	\$ -
Constructability Review	\$ 72,634	\$ -	\$ -	\$ -
Plan Review & Building Permits	\$ 250,971	\$ 60,724	\$ 46,754	\$ 107,478
Special Inspection and Testing	\$ 50,053	\$ -	\$ 21,000	\$ 21,000
Miscellaneous Fees	\$ -	\$ 43,513	\$ (11,213)	\$ 32,300
Ed Specs	\$ -	\$ -	\$ -	\$ -
Kitchen	\$ -	\$ -	\$ -	\$ -
Miscellaneous				
Legal Advertisements	\$ 4,823	\$ 1,217	\$ 3,690	\$ 4,907
Furniture, Fixtures, and Equipment (FF&E)	\$ -	\$ 7,631	\$ 17,369	\$ 25,000
Technology	\$ -	\$ 40,623	\$ 377	\$ 41,000
Technology (Design)	\$ 210,634	\$ 1,847	\$ 26,830	\$ 28,677
Acoustics	\$ 36,317	\$ -	\$ -	\$ -
Criminal Background Checks	\$ 3,162	\$ -	\$ -	\$ -
System Development Charges	\$ -	\$ -	\$ -	\$ -
Value Engineering	\$ 72,634	\$ -	\$ -	\$ -
Utility Connection Fee	\$ 116,214	\$ -	\$ -	\$ -
Unallocated Owner Contingency	\$ 2,964,431	\$ -	\$ 37,587	\$ 37,587
Inflation	\$ 1,885,566	\$ -	\$ 74,433	\$ 74,433
Sub Total Soft Cost	\$ 8,876,165	\$ 480,347	\$ 405,713	\$ 886,060
Total Project Cost	\$ 33,467,752	\$ 7,520,256	\$ 306,848	\$ 7,827,104

* Budget has been moved to the Project Level
 **Budget has been moved to the Program Level



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
PROGRAM LEVEL BUDGET
JUNE 30, 2025**

Program Revenue ¹	Original Budget	Received to Date	Allocated to Date	Unallocated Balance	Revised Budget
Bond and Other Proceeds					
Bond Proceeds	\$ 107,380,000	\$ 107,380,000	\$ 107,380,000	\$ -	\$ 107,380,000
Bond Premium	\$ 22,436,690	\$ 22,436,690	\$ 20,743,997	\$ 1,692,692	\$ 22,436,690
OSCIM Grant (Ashland Middle School)	\$ 1,032,927	\$ 4,000,000	\$ 4,000,000	\$ -	\$ 4,000,000
Seismic (Walker)	\$ 2,500,000	\$ 2,497,447	\$ 2,497,447	\$ -	\$ 2,497,447
Seismic (Walker-Gymnasium)	\$ -	\$ 1,816,151	\$ 1,816,151	\$ -	\$ 1,816,151
Seismic (Ashland High School)	\$ -	\$ 2,011,704	\$ 2,011,704	\$ -	\$ 2,011,704
Seismic (Ashland High School Science)	\$ -	\$ -	\$ 2,500,000	\$ -	\$ 2,500,000
	\$ 5,000,000	\$ 5,921,594	\$ 4,628,566	\$ 1,293,028	\$ 5,921,594
Miscellaneous	\$ -	\$ 428,941	\$ -	\$ 428,941	\$ 428,941
Total Revenue	\$ 138,349,617	\$ 146,492,526	\$ 145,577,865	\$ 3,414,661	\$ 148,992,526

1. Program Revenue is an estimate. Accuracy should be verified by district personnel

The financial statement presentation has been prepared as a courtesy by HMK. They are based on information derived from ledgers provided by the agency, which have not been independently verified. The financial information included in this presentation is unaudited and should be used for informational purposes only and should not be relied upon for any other use.



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
PROGRAM BUDGET
JUNE 30, 2025**

	Original Budget	Paid to Date	Remaining Balance	Revised Budget
Program Expense				
District Wide Programs	\$ 24,591,587	\$ 7,039,909	\$ (98,865)	\$ 6,941,044
District Wide Solar Projects	\$ -	\$ 931,886	\$ 718,912	\$ 1,650,798
Helman Elementary	\$ 11,294,084	\$ 15,367,756	\$ (232,685)	\$ 15,135,071
Walker Elementary	\$ 11,252,185	\$ 30,130,377	\$ 87,160	\$ 30,217,537
Ashland Middle School	\$ 21,960,270	\$ 35,813,522	\$ (366,146)	\$ 35,447,376
Ashland High School	\$ 9,124,089	\$ 24,629,279	\$ 2,987,810	\$ 27,617,089
Willow Wind Learning Center	\$ -	\$ 1,732,696	\$ 1,732	\$ 1,734,428
Construction Sub Total	\$ 78,222,215	\$ 115,645,424	\$ 3,097,918	\$ 118,743,343
Soft Cost				
Administrative Cost				
Legal Fees	\$ 100,000	\$ 29,844	\$ (6,430)	\$ 23,414
Bond Counsel	\$ -	\$ -	\$ -	\$ -
Bond Issuance Cost	\$ 625,293	\$ 625,293	\$ -	\$ 625,293
Builders Risk Insurance	\$ -	\$ 80,126	\$ (7,926)	\$ 72,200
Project Management	\$ 2,274,483	\$ 4,637,321	\$ (628,457)	\$ 4,008,864
Reimbursable Expenses	\$ 151,631	\$ 328,755	\$ (1,788)	\$ 326,967
Communications	\$ -	\$ 199,367	\$ (6,095)	\$ 193,272
Sustainability	\$ -	\$ -	\$ -	\$ -
Miscellaneous Fees (Bank, consulting)	\$ -	\$ 415,083	\$ (109,434)	\$ 305,649
Ashland SD Staff	\$ -	\$ 1,322,706	\$ (465,070)	\$ 857,636
Lincoln Elementary	\$ -	\$ 42,354	\$ 446	\$ 42,800
District Wide Roofing Project	\$ -	\$ 46,200	\$ -	\$ 46,200
Site Cost				
Site Survey	\$ 213,903	\$ 149,234	\$ 8,489	\$ 157,723
Geo-Tech Report	\$ 123,179	\$ 114,071	\$ 10,663	\$ 124,734
Planning Cost				
Design Fees	\$ 7,414,694	\$ 8,617,168	\$ (437,367)	\$ 8,179,800
A & E Reimbursable Expenses	\$ 144,431	\$ 35,420	\$ 81,103	\$ 116,523
Commissioning	\$ 334,589	\$ 393,279	\$ (32,970)	\$ 360,309
Printing & Plan Distribution	\$ 31,288	\$ 1,724	\$ 55	\$ 1,779
Hazardous Materials Consultant	\$ 418,761	\$ 560,005	\$ (84,149)	\$ 475,856
Construction Testing	\$ -	\$ -	\$ -	\$ -
Constructability Review	\$ 285,616	\$ 573,003	\$ 470	\$ 573,473
Plan Review & Building Permits	\$ 764,778	\$ 3,355,949	\$ 161,265	\$ 3,517,213
Special Inspection and Testing	\$ 391,469	\$ 922,685	\$ (381,980)	\$ 540,705
Miscellaneous Fees	\$ 205,522	\$ 1,061,577	\$ (219,373)	\$ 842,204
Ed Specs	\$ 73,532	\$ -	\$ -	\$ -
Kitchen	\$ 32,940	\$ -	\$ -	\$ -
Miscellaneous				
Legal Advertisements	\$ 12,823	\$ 1,457	\$ 5,450	\$ 6,907
Furniture, Fixtures, and Equipment (FF&E)	\$ 2,569,031	\$ 2,666,350	\$ 72,489	\$ 2,738,839
Technology	\$ 404,005	\$ 466,937	\$ 20,763	\$ 487,700
Technology (Design)	\$ 467,536	\$ 7,252	\$ 63,223	\$ 70,475
Acoustics	\$ 113,387	\$ -	\$ -	\$ -
Criminal Background Checks	\$ 9,862	\$ 12,213	\$ (130)	\$ 12,083
System Development Charges	\$ 332,544	\$ 19,692	\$ (600)	\$ 19,092
Value Engineering	\$ 194,985	\$ -	\$ -	\$ -
Utility Connection Fee	\$ 116,214	\$ -	\$ -	\$ -
Unallocated Owner Contingency	\$ 9,104,657	\$ -	\$ 38,849	\$ 38,849
Inflation	\$ 6,111,120	\$ -	\$ 74,433	\$ 74,433
Sub Total Soft Cost	\$ 33,022,273	\$ 26,685,064	\$ (1,844,071)	\$ 24,840,992
Total Project Cost	\$ 111,244,488	\$ 142,330,488		\$ 143,584,335



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
PROGRAM LEVEL BUDGET
JUNE 30, 2025**

Program Expense		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Soft Cost					
Legal Fees		\$ -	\$ 26,896	\$ (3,482)	\$ 23,414
Bond Counsel		\$ -	\$ -	\$ -	\$ -
Bond Issuance Cost		\$ 625,293	\$ 625,293	\$ -	\$ 625,293
Builders Risk Insurance		\$ -	\$ -	\$ -	\$ -
Project Management	12	\$ -	\$ 4,275,868	\$ (307,004)	\$ 3,968,864
Reimbursable Expenses	11	\$ -	\$ 311,211	\$ 356	\$ 311,567
Communications	11	\$ -	\$ 199,367	\$ (6,095)	\$ 193,272
Sustainability		\$ -	\$ -	\$ -	\$ -
Criminal Background Checks	10,11	\$ -	\$ 12,213	\$ (130)	\$ 12,083
Printing & Plan Distribution	10	\$ -	\$ 779	\$ -	\$ 779
Miscellaneous Fees (Bank, consulting)	11	\$ -	\$ 415,083	\$ (109,434)	\$ 305,649
Ashland SD Staff	11,12	\$ -	\$ 1,322,706	\$ (465,070)	\$ 857,636
Lincoln Elementary		\$ -	\$ 42,354	\$ 446	\$ 42,800
District Wide Roofing Project		\$ -	\$ 46,200	\$ -	\$ 46,200
Sub Total Soft Cost		\$ 625,293	\$ 7,277,969	\$ (890,412)	\$ 6,387,557

1. Reallocated within budget
2. Reallocated within budget (06.30.21)
3. Reallocated within budget (03.31.22)
4. Reallocated Bond Issuance Costs back to Program Level (06.30.22)
5. Reallocated within budget (06.30.22)
6. Reallocated from investment for add'l staff time (08.31.22)
7. Reallocated from investment income and budget (09.30.22)
8. Reallocated within budget (10.31.22)
9. Reallocated within budget (12.31.22)
10. Reallocated within budget (01.31.23)
11. Reallocated \$360k from Security (04.30.23)
12. Reallocated within budget (05.31.23)

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**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
DW RESTROOMS BUDGET
JUNE 30, 2025**

Project Expense		Original Budget		Paid to Date		Remaining Balance		Revised Budget
Hard Cost								
Maximum Allowable Construction Cost (MACC)	2	\$ 3,087,500	\$	-	\$	-	\$	-
Asbestos		\$ 58,705	\$	-	\$	-	\$	-
Seismic Retro Upgrade		-	\$	-	\$	-	\$	-
1.5% Solar (Total Project Major Building)		-	\$	-	\$	-	\$	-
Construction Contingency	2	\$ 162,500	\$	-	\$	-	\$	-
Construction Sub Total		\$ 3,308,705	\$	-	\$	-	\$	-
Soft Cost								
Administrative Cost								
Legal Fees		\$ 5,000	\$	-	\$	-	\$	-
Bond Counsel		-	\$	-	\$	-	\$	-
Bond Issuance Cost		-	\$	-	\$	-	\$	-
Builders Risk Insurance	3	-	\$	-	\$	-	\$	-
Project Management		\$ 99,261	\$	-	\$	-	\$	-
Reimbursable Expenses		\$ 6,617	\$	-	\$	-	\$	-
Communications		-	\$	-	\$	-	\$	-
Sustainability		-	\$	-	\$	-	\$	-
Site Cost								
Site Survey		-	\$	-	\$	-	\$	-
Geo-Tech Report		-	\$	-	\$	-	\$	-
Planning Cost								
Design Fees	2	\$ 363,958	\$	-	\$	-	\$	-
A & E Reimbursable Expenses	2	\$ 6,617	\$	-	\$	-	\$	-
Commissioning		-	\$	-	\$	-	\$	-
Printing & Plan Distribution		\$ 2,316	\$	-	\$	-	\$	-
Hazardous Materials Consultant	2	\$ 66,174	\$	-	\$	-	\$	-
Construction Testing		-	\$	-	\$	-	\$	-
Constructability Review		-	\$	-	\$	-	\$	-
Plan Review & Building Permits	2	\$ 39,704	\$	-	\$	-	\$	-
Special Inspection and Testing		-	\$	-	\$	-	\$	-
Miscellaneous Fees		-	\$	-	\$	-	\$	-
Ed Specs		-	\$	-	\$	-	\$	-
Kitchen		-	\$	-	\$	-	\$	-
Miscellaneous								
Legal Advertisements	2	\$ 1,323	\$	-	\$	-	\$	-
Furniture, Fixtures, and Equipment (FF&E)		-	\$	-	\$	-	\$	-
Technology		-	\$	-	\$	-	\$	-
Technology (Design)		-	\$	-	\$	-	\$	-
Acoustics		-	\$	-	\$	-	\$	-
Criminal Background Checks		\$ 662	\$	-	\$	-	\$	-
System Development Charges		-	\$	-	\$	-	\$	-
Value Engineering		-	\$	-	\$	-	\$	-
Utility Connection Fee		-	\$	-	\$	-	\$	-
Unallocated Owner Contingency	2	\$ 413,588	\$	-	\$	-	\$	-
Inflation		\$ 258,837	\$	-	\$	-	\$	-
Sub Total Soft Cost		\$ 1,264,057	\$	-	\$	-	\$	-
Total Project Cost		\$ 4,572,762	\$	-	\$	-	\$	-

1. Reallocated \$750,000 to AHS (07.31.21)
1. Reallocated \$641,400 to AHS (07.31.21)
1. Reallocated \$1,100,040 to AMS (07.31.21)
2. Reallocated \$ 684,164 to AHS (09.30.21)
3. Reallocated Bond Issuance Costs back to Program Level (06.30.22)



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
DW SECURITY BUDGET
JUNE 30, 2025**

Project Expense		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Hard Cost					
Maximum Allowable Construction Cost (MACC)	10	\$ 2,850,000	\$ 299,527	\$ 7,415	\$ 306,942
Asbestos		\$ -	\$ -	\$ -	\$ -
Seismic Retro Upgrade		\$ -	\$ -	\$ -	\$ -
1.5% Solar (Total Project Major Building)		\$ -	\$ -	\$ -	\$ -
Construction Contingency		\$ 150,000	\$ -	\$ 137,207	\$ 137,207
Construction Sub Total		\$ 3,000,000	\$ 299,527	\$ 144,622	\$ 444,149
Soft Cost					
Administrative Cost					
Legal Fees		\$ 5,000	\$ -	\$ -	\$ -
Bond Counsel		\$ -	\$ -	\$ -	\$ -
Bond Issuance Cost		\$ -	\$ -	\$ -	\$ -
Builders Risk Insurance		\$ -	\$ -	\$ -	\$ -
Project Management		\$ 90,000	\$ -	\$ -	\$ -
Reimbursable Expenses		\$ 6,000	\$ -	\$ -	\$ -
Communications		\$ -	\$ -	\$ -	\$ -
Sustainability		\$ -	\$ -	\$ -	\$ -
Site Cost					
Site Survey		\$ 30,000	\$ -	\$ 30,000	\$ 30,000
Geo-Tech Report		\$ -	\$ -	\$ -	\$ -
Planning Cost					
Design Fees		\$ 210,000	\$ -	\$ 171,500	\$ 171,500
A & E Reimbursable Expenses		\$ 6,000	\$ -	\$ -	\$ -
Commissioning		\$ -	\$ -	\$ -	\$ -
Printing & Plan Distribution		\$ 2,100	\$ -	\$ -	\$ -
Hazardous Materials Consultant		\$ -	\$ -	\$ -	\$ -
Construction Testing		\$ -	\$ -	\$ -	\$ -
Constructability Review		\$ -	\$ -	\$ -	\$ -
Plan Review & Building Permits		\$ 30,000	\$ -	\$ 18,000	\$ 18,000
Special Inspection and Testing		\$ 21,000	\$ -	\$ 21,000	\$ 21,000
Miscellaneous Fees		\$ -	\$ -	\$ -	\$ -
Ed Specs		\$ -	\$ -	\$ -	\$ -
Kitchen		\$ -	\$ -	\$ -	\$ -
Miscellaneous					
Legal Advertisements		\$ 1,000	\$ -	\$ -	\$ -
Furniture, Fixtures, and Equipment (FF&E)		\$ -	\$ -	\$ -	\$ -
Technology		\$ -	\$ -	\$ -	\$ -
Technology (Design)		\$ 30,000	\$ -	\$ 27,000	\$ 27,000
Acoustics		\$ -	\$ -	\$ -	\$ -
Criminal Background Checks		\$ 500	\$ -	\$ -	\$ -
System Development Charges		\$ -	\$ -	\$ -	\$ -
Value Engineering		\$ -	\$ -	\$ -	\$ -
Utility Connection Fee		\$ -	\$ -	\$ -	\$ -
Unallocated Owner Contingency	6	\$ 375,000	\$ -	\$ 10,852	\$ 10,852
Inflation	7,8,9,10	\$ 228,396	\$ -	\$ 74,433	\$ 74,433
Sub Total Soft Cost		\$ 1,034,996	\$ -	\$ 352,785	\$ 352,785
Total Project Cost		\$ 4,034,996	\$ 299,527	\$ 497,407	\$ 796,934

1. Reallocated \$350,000 to new projects (transportation, bellview, maintenance, and district office)
2. Reallocated \$2,000,000 to AHS (09.30.21)
3. Reallocated Bond Issuance Costs back to Program Level (06.30.22)
4. Reallocated \$50k from Security to Transportation and \$40k to AMS (06.30.22)
5. Reallocated \$24k from Security to Maintenance (08.31.22)
6. Reallocated \$89k from Security to BES for Sentinel (03.31.23)
7. Reallocated \$26k from Security to AMS for Ednetics (03.31.23)
8. Reallocated \$24k from Security to Maintenance for Ednetics (03.31.23)
9. Reallocated \$17k from Security to Transportation for Ednetics(03.31.23)
10. Reallocated \$360k from Security to Program Level (04.30.23)



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
DW HVAC & MEP BUDGET
JUNE 30, 2025**

Project Expense		Original Budget		Paid to Date		Remaining Balance		Revised Budget
Hard Cost								
Maximum Allowable Construction Cost (MACC)	3	\$ 13,569,000	\$	-	\$	-	\$	-
Asbestos		\$ 257,742	\$	-	\$	-	\$	-
Seismic Retro Upgrade			\$	-	\$	-	\$	-
1.5% Solar (Total Project Major Building)			\$	-	\$	-	\$	-
Construction Contingency	3	\$ 856,140	\$	-	\$	-	\$	-
Construction Sub Total		\$ 14,682,882	\$	-	\$	-	\$	-
Soft Cost								
Administrative Cost								
Legal Fees		\$ 20,000	\$	-	\$	-	\$	-
Bond Counsel		\$ -	\$	-	\$	-	\$	-
Bond Issuance Cost		\$ -	\$	-	\$	-	\$	-
Builders Risk Insurance	5	\$ -	\$	-	\$	-	\$	-
Project Management		\$ 435,802	\$	-	\$	-	\$	-
Reimbursable Expenses		\$ 29,053	\$	-	\$	-	\$	-
Communications		\$ -	\$	-	\$	-	\$	-
Sustainability		\$ -	\$	-	\$	-	\$	-
Site Cost								
Site Survey		\$ -	\$	-	\$	-	\$	-
Geo-Tech Report		\$ -	\$	-	\$	-	\$	-
Planning Cost								
Design Fees	3	\$ 1,452,674	\$	-	\$	-	\$	-
A & E Reimbursable Expenses	3	\$ 29,053	\$	-	\$	-	\$	-
Commissioning	3	\$ 145,267	\$	-	\$	-	\$	-
Printing & Plan Distribution		\$ 5,000	\$	-	\$	-	\$	-
Hazardous Materials Consultant	3	\$ 72,634	\$	-	\$	-	\$	-
Construction Testing		\$ -	\$	-	\$	-	\$	-
Constructability Review	3	\$ 72,634	\$	-	\$	-	\$	-
Plan Review & Building Permits	3	\$ 145,267	\$	-	\$	-	\$	-
Special Inspection and Testing	3	\$ 29,053	\$	-	\$	-	\$	-
Miscellaneous Fees		\$ -	\$	-	\$	-	\$	-
Ed Specs		\$ -	\$	-	\$	-	\$	-
Kitchen		\$ -	\$	-	\$	-	\$	-
Miscellaneous								
Legal Advertisements		\$ 1,500	\$	-	\$	-	\$	-
Furniture, Fixtures, and Equipment (FF&E)		\$ -	\$	-	\$	-	\$	-
Technology		\$ -	\$	-	\$	-	\$	-
Technology (Design)		\$ 72,634	\$	-	\$	-	\$	-
Acoustics	3	\$ 36,317	\$	-	\$	-	\$	-
Criminal Background Checks		\$ 1,000	\$	-	\$	-	\$	-
System Development Charges		\$ -	\$	-	\$	-	\$	-
Value Engineering	3	\$ 72,634	\$	-	\$	-	\$	-
Utility Connection Fee	3	\$ 116,214	\$	-	\$	-	\$	-
Unallocated Owner Contingency	4	\$ 1,815,843	\$	-	\$	-	\$	-
Inflation	4	\$ 1,144,761	\$	-	\$	-	\$	-
Sub Total Soft Cost		\$ 5,697,340	\$	-	\$	-	\$	-
Total Project Cost		\$ 20,380,222	\$	-	\$	-	\$	-

2. Reallocated \$165,000 to AMS for HVAC upgrade (06.01.21)
3. Reallocated \$1,310,000 to AHS (07.01.21)
3. Reallocated \$7,100,000 to AHS -Phase II (07.01.21)
3. Reallocated \$475,000 to AHS -Phase II (07.01.21)
3. Reallocated \$972,316 to AHS -Phase II (07.01.21)
4. Reallocated \$486,606 to WES (02.28.22)
5. Reallocated Bond Issuance Costs back to Program Level (06.30.22)



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
DW TECHNOLOGY BUDGET
JUNE 30, 2025**

Project Expense		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Hard Cost					
Maximum Allowable Construction Cost (MACC)	8/9	\$ 3,420,000	\$ 3,912,847	\$ (513,623)	\$ 3,399,224
Asbestos		\$ -	\$ -	\$ -	\$ -
Seismic Retro Upgrade		\$ -	\$ -	\$ -	\$ -
1.5% Solar (Total Project Major Building)		\$ -	\$ -	\$ -	\$ -
Construction Contingency		\$ 180,000	\$ -	\$ -	\$ -
Construction Sub Total		\$ 3,600,000	\$ 3,912,847	\$ (513,623)	\$ 3,399,224
Soft Cost					
Administrative Cost					
Legal Fees		\$ 5,000	\$ -	\$ -	\$ -
Bond Counsel		\$ -	\$ -	\$ -	\$ -
Bond Issuance Cost		\$ -	\$ -	\$ -	\$ -
Builders Risk Insurance		\$ -	\$ -	\$ -	\$ -
Project Management		\$ 108,000	\$ -	\$ -	\$ -
Reimbursable Expenses		\$ 7,200	\$ -	\$ -	\$ -
Communications		\$ -	\$ -	\$ -	\$ -
Sustainability		\$ -	\$ -	\$ -	\$ -
Site Cost					
Site Survey		\$ -	\$ -	\$ -	\$ -
Geo-Tech Report		\$ -	\$ -	\$ -	\$ -
Planning Cost					
Design Fees		\$ -	\$ -	\$ -	\$ -
A & E Reimbursable Expenses		\$ -	\$ -	\$ -	\$ -
Commissioning		\$ -	\$ -	\$ -	\$ -
Printing & Plan Distribution		\$ -	\$ -	\$ -	\$ -
Hazardous Materials Consultant		\$ -	\$ -	\$ -	\$ -
Construction Testing		\$ -	\$ -	\$ -	\$ -
Constructability Review		\$ -	\$ -	\$ -	\$ -
Plan Review & Building Permits	9	\$ 36,000	\$ -	\$ -	\$ -
Special Inspection and Testing		\$ -	\$ -	\$ -	\$ -
Miscellaneous Fees		\$ -	\$ -	\$ -	\$ -
Ed Specs		\$ -	\$ -	\$ -	\$ -
Kitchen		\$ -	\$ -	\$ -	\$ -
Miscellaneous					
Legal Advertisements	9	\$ 1,000	\$ -	\$ -	\$ -
Furniture, Fixtures, and Equipment (FF&E)		\$ -	\$ -	\$ -	\$ -
Technology		\$ -	\$ -	\$ -	\$ -
Technology (Design)	9	\$ 108,000	\$ 1,847	\$ (170)	\$ 1,677
Acoustics		\$ -	\$ -	\$ -	\$ -
Criminal Background Checks		\$ 1,000	\$ -	\$ -	\$ -
System Development Charges		\$ -	\$ -	\$ -	\$ -
Value Engineering		\$ -	\$ -	\$ -	\$ -
Utility Connection Fee		\$ -	\$ -	\$ -	\$ -
Unallocated Owner Contingency	6	\$ 360,000	\$ -	\$ -	\$ -
Inflation		\$ 253,572	\$ -	\$ -	\$ -
Sub Total Soft Cost		\$ 879,772	\$ 1,847	\$ (170)	\$ 1,677
Total Project Cost		\$ 4,479,772	\$ 3,914,694	\$ (513,793)	\$ 3,400,901

* Budget has been moved to the Project Level
 **Budget has been moved to the Program Level
 *** Re-allocated \$723,216 to Helman (05.31.20)
 +Budget has been moved to the Program Level (10.31.20)
 ^ Re-allocated \$223,636 to Program Level (11.30.20)
 1. Reallocated \$362,000 to AHS (09.30.21)
 2. Reallocated from Contingency (12.31.21)
 3. Reallocated from Contingency (03.31.22)
 4. Reallocated from Contingency (05.31.22)
 5. Reallocated Bond Issuance Costs back to Program Level (06.30.22)
 6. Reallocated costs to MACC (06.30.22)
 7. Reallocated from Invest Inc (08.31.22)
 8. Reallocated 300k from Invest Inc (09.30.22)
 9. Reallocated within Budget (09.30.22)



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
TRANSPORTATION BUDGET
JUNE 30, 2025**

Project Expense		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Hard Cost					
Maximum Allowable Construction Cost (MACC)	8,10	\$ -	\$ 559,844	\$ 1	\$ 559,845
Asbestos		\$ -	\$ -	\$ -	\$ -
Seismic Retro Upgrade		\$ -	\$ -	\$ -	\$ -
1.5% Solar (Total Project Major Building)		\$ -	\$ -	\$ -	\$ -
Construction Contingency	8,10	\$ -	\$ -	\$ 1,652	\$ 1,652
Construction Sub Total		\$ -	\$ 559,844	\$ 1,653	\$ 561,497
Soft Cost					
Administrative Cost					
Legal Fees		\$ -	\$ -	\$ -	\$ -
Bond Counsel		\$ -	\$ -	\$ -	\$ -
Bond Issuance Cost		\$ -	\$ -	\$ -	\$ -
Builders Risk Insurance		\$ -	\$ -	\$ -	\$ -
Project Management		\$ -	\$ -	\$ -	\$ -
Reimbursable Expenses		\$ -	\$ -	\$ -	\$ -
Communications		\$ -	\$ -	\$ -	\$ -
Sustainability		\$ -	\$ -	\$ -	\$ -
Site Cost					
Site Survey		\$ -	\$ -	\$ -	\$ -
Geo-Tech Report		\$ -	\$ -	\$ -	\$ -
Planning Cost					
Design Fees		\$ -	\$ 32,860	\$ -	\$ 32,860
A & E Reimbursable Expenses		\$ -	\$ -	\$ -	\$ -
Commissioning		\$ -	\$ 19,501	\$ 499	\$ 20,000
Printing & Plan Distribution		\$ -	\$ -	\$ -	\$ -
Hazardous Materials Consultant	10	\$ -	\$ 8,850	\$ 0	\$ 8,850
Construction Testing		\$ -	\$ -	\$ -	\$ -
Constructability Review		\$ -	\$ -	\$ -	\$ -
Plan Review & Building Permits		\$ -	\$ 17,903	\$ 7,152	\$ 25,055
Special Inspection and Testing		\$ -	\$ -	\$ -	\$ -
Miscellaneous Fees	8	\$ -	\$ 4,388	\$ 613	\$ 5,000
Ed Specs		\$ -	\$ -	\$ -	\$ -
Kitchen		\$ -	\$ -	\$ -	\$ -
Miscellaneous					
Legal Advertisements		\$ -	\$ 407	\$ 0	\$ 407
Furniture, Fixtures, and Equipment (FF&E)		\$ -	\$ 7,631	\$ 17,369	\$ 25,000
Technology	9	\$ -	\$ 16,822	\$ 178	\$ 17,000
Technology (Design)		\$ -	\$ -	\$ -	\$ -
Acoustics		\$ -	\$ -	\$ -	\$ -
Criminal Background Checks		\$ -	\$ -	\$ -	\$ -
System Development Charges		\$ -	\$ -	\$ -	\$ -
Value Engineering		\$ -	\$ -	\$ -	\$ -
Utility Connection Fee		\$ -	\$ -	\$ -	\$ -
Unallocated Owner Contingency	8	\$ -	\$ -	\$ -	\$ -
Inflation		\$ -	\$ -	\$ -	\$ -
Sub Total Soft Cost		\$ -	\$ 108,361	\$ 25,812	\$ 134,172
Total Project Cost		\$ -	\$ 668,205	\$ 27,465	\$ 695,669

1. Reallocated from DW Security and HVAC (04.18.21)
2. Reallocated within Budget(12.31.21)
3. Reallocated to Maintenance Bldg (02.28.22)
4. Reallocated to Maintenance Bldg (03.31.22)
5. Reallocated within Budget (05.31.22)
6. Reallocated \$50k from Security to Transportation (06.30.22)
7. Reallocated within Budget (08.31.22)
8. Reallocated within Budget (09.30.22)
9. Reallocated from Security (03.31.23)



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
BELLVIEW BUDGET
JUNE 30, 2025**

Project Expense		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Hard Cost					
Maximum Allowable Construction Cost (MACC)	6	\$ -	\$ 352,879	\$ 54,763	\$ 407,642
Asbestos		\$ -	\$ -	\$ -	\$ -
Seismic Retro Upgrade		\$ -	\$ -	\$ -	\$ -
1.5% Solar (Total Project Major Building)		\$ -	\$ -	\$ -	\$ -
Phase 2	5,6	\$ -	\$ 1,237,830	\$ 51,810	\$ 1,289,640
Construction Contingency	6	\$ -	\$ -	\$ 144,186	\$ 144,186
Construction Sub Total		\$ -	\$ 1,590,709	\$ 250,759	\$ 1,841,468
Soft Cost					
Administrative Cost					
Legal Fees		\$ -	\$ -	\$ -	\$ -
Bond Counsel		\$ -	\$ -	\$ -	\$ -
Bond Issuance Cost		\$ -	\$ -	\$ -	\$ -
Builders Risk Insurance		\$ -	\$ -	\$ -	\$ -
Project Management		\$ -	\$ -	\$ -	\$ -
Reimbursable Expenses		\$ -	\$ -	\$ -	\$ -
Communications		\$ -	\$ -	\$ -	\$ -
Sustainability		\$ -	\$ -	\$ -	\$ -
Site Cost					
Site Survey	4	\$ -	\$ 2,270	\$ -	\$ 2,270
Geo-Tech Report		\$ -	\$ -	\$ -	\$ -
Planning Cost					
Design Fees	4,7	\$ -	\$ 55,927	\$ (7,234)	\$ 48,693
A & E Reimbursable Expenses		\$ -	\$ -	\$ 5,000	\$ 5,000
Commissioning	4,7	\$ -	\$ 141,992	\$ (18,992)	\$ 123,000
Printing & Plan Distribution	7	\$ -	\$ -	\$ -	\$ -
Hazardous Materials Consultant		\$ -	\$ 4,540	\$ 460	\$ 5,000
Construction Testing		\$ -	\$ -	\$ -	\$ -
Constructability Review		\$ -	\$ -	\$ -	\$ -
Plan Review & Building Permits		\$ -	\$ 8,508	\$ 21,405	\$ 29,913
Special Inspection and Testing		\$ -	\$ -	\$ -	\$ -
Miscellaneous Fees		\$ -	\$ 32,270	\$ (13,270)	\$ 19,000
Ed Specs		\$ -	\$ -	\$ -	\$ -
Kitchen		\$ -	\$ -	\$ -	\$ -
Miscellaneous					
Legal Advertisements		\$ -	\$ 404	\$ 2,096	\$ 2,500
Furniture, Fixtures, and Equipment (FF&E)		\$ -	\$ -	\$ -	\$ -
Technology		\$ -	\$ -	\$ -	\$ -
Technology (Design)		\$ -	\$ -	\$ -	\$ -
Acoustics		\$ -	\$ -	\$ -	\$ -
Criminal Background Checks		\$ -	\$ -	\$ -	\$ -
System Development Charges		\$ -	\$ -	\$ -	\$ -
Value Engineering		\$ -	\$ -	\$ -	\$ -
Utility Connection Fee		\$ -	\$ -	\$ -	\$ -
Unallocated Owner Contingency	4,7	\$ -	\$ -	\$ -	\$ -
Inflation		\$ -	\$ -	\$ -	\$ -
Sub Total Soft Cost		\$ -	\$ 245,912	\$ (10,536)	\$ 235,376
Total Project Cost		\$ -	\$ 1,836,621	\$ 240,223	\$ 2,076,844

1. Reallocated from DW Security and HVAC (04.18.21)
2. Reallocate within budget (12.31.21)
3. Reallocate within budget (06.30.22)
4. Reallocate within budget (09.30.22)
5. Reallocate from Premium and DW Security (03.31.23)



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
MAINTENANCE BLDG BUDGET
JUNE 30, 2025**

Project Expense		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Hard Cost					
Maximum Allowable Construction Cost (MACC)		\$ -	\$ 653,092	\$ -	\$ 653,092
Security Fencing	7,10	\$ -	\$ 23,890	\$ -	\$ 23,890
Seismic Retro Upgrade		\$ -	\$ -	\$ -	\$ -
1.5% Solar (Total Project Major Building)		\$ -	\$ -	\$ -	\$ -
Construction Contingency	10	\$ -	\$ -	\$ 17,724	\$ 17,724
Construction Sub Total		\$ -	\$ 676,982	\$ 17,724	\$ 694,706
Soft Cost					
Administrative Cost					
Legal Fees		\$ -	\$ -	\$ -	\$ -
Bond Counsel		\$ -	\$ -	\$ -	\$ -
Bond Issuance Cost		\$ -	\$ -	\$ -	\$ -
Builders Risk Insurance		\$ -	\$ -	\$ -	\$ -
Project Management		\$ -	\$ -	\$ -	\$ -
Reimbursable Expenses		\$ -	\$ -	\$ -	\$ -
Communications		\$ -	\$ -	\$ -	\$ -
Sustainability		\$ -	\$ -	\$ -	\$ -
Site Cost					
Site Survey		\$ -	\$ -	\$ -	\$ -
Geo-Tech Report		\$ -	\$ -	\$ -	\$ -
Planning Cost					
Design Fees	6	\$ -	\$ 28,850	\$ 155	\$ 29,005
A & E Reimbursable Expenses		\$ -	\$ -	\$ 5,000	\$ 5,000
Commissioning		\$ -	\$ 22,501	\$ 2,499	\$ 25,000
Printing & Plan Distribution		\$ -	\$ -	\$ -	\$ -
Hazardous Materials Consultant		\$ -	\$ 7,500	\$ -	\$ 7,500
Construction Testing		\$ -	\$ -	\$ -	\$ -
Constructability Review		\$ -	\$ -	\$ -	\$ -
Plan Review & Building Permits	8	\$ -	\$ 34,313	\$ 197	\$ 34,510
Special Inspection and Testing		\$ -	\$ -	\$ -	\$ -
Miscellaneous Fees	6	\$ -	\$ 6,855	\$ 1,445	\$ 8,300
Ed Specs		\$ -	\$ -	\$ -	\$ -
Kitchen		\$ -	\$ -	\$ -	\$ -
Miscellaneous					
Legal Advertisements		\$ -	\$ 407	\$ 1,593	\$ 2,000
Furniture, Fixtures, and Equipment (FF&E)		\$ -	\$ -	\$ -	\$ -
Technology	8,9	\$ -	\$ 23,801	\$ 199	\$ 24,000
Technology (Design)		\$ -	\$ -	\$ -	\$ -
Acoustics		\$ -	\$ -	\$ -	\$ -
Criminal Background Checks		\$ -	\$ -	\$ -	\$ -
System Development Charges		\$ -	\$ -	\$ -	\$ -
Value Engineering		\$ -	\$ -	\$ -	\$ -
Utility Connection Fee		\$ -	\$ -	\$ -	\$ -
Unallocated Owner Contingency	6	\$ -	\$ -	\$ 26,735	\$ 26,735
Inflation		\$ -	\$ -	\$ -	\$ -
Sub Total Soft Cost		\$ -	\$ 124,227	\$ 37,823	\$ 162,050
Total Project Cost		\$ -	\$ 801,209	\$ 55,547	\$ 856,756

1. Reallocated from DW Security and HVAC (04.18.21)
2. Reallocated from Transportation (02.28.22)
3. Reallocated within Budget (02.28.22)
4. Reallocated within Budget (03.31.22)
5. Reallocated within Budget (05.31.22)
6. Reallocated within Budget (06.30.22)
7. Reallocated from Safety and Security (08.31.22)
8. Reallocate from investment income (09.30.22)
9. Reallocate 24k from Security (01.31.23)

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**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
HELMAN ELEMENTARY SCHOOL BUDGET
JUNE 30, 2025**

Project Expense		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Hard Cost					
Maximum Allowable Construction Cost (MACC)	13	\$ 10,576,000	\$ 15,367,756	\$ (232,685)	\$ 15,135,071
Asbestos		\$ 189,259		\$ -	\$ -
Seismic Retro Upgrade				\$ -	
1.5% Solar (Total Project Major Building)				\$ -	\$ -
Construction Contingency	13	\$ 528,825	\$ -	\$ -	\$ -
Construction Sub Total		\$ 11,294,084	\$ 15,367,756	\$ (232,685)	\$ 15,135,071
Soft Cost					
Administrative Cost					
Legal Fees		\$ 15,000	\$ -	\$ -	\$ -
Bond Counsel		\$ -	\$ -	\$ -	\$ -
Bond Issuance Cost		\$ -	\$ -	\$ -	\$ -
Builders Risk Insurance		\$ -	\$ 10,869	\$ 131	\$ 11,000
Project Management		\$ 338,823	\$ -	\$ -	\$ -
Reimbursable Expenses		\$ 22,588	\$ -	\$ -	\$ -
Communications		\$ -	\$ -	\$ -	\$ -
Sustainability		\$ -	\$ -	\$ -	\$ -
Site Cost					
Site Survey		\$ 22,588	\$ 16,151	\$ -	\$ 16,151
Geo-Tech Report		\$ 33,882	\$ 22,170	\$ 30	\$ 22,200
Planning Cost					
Design Fees	13	\$ 1,129,408	\$ 1,213,367	\$ 0	\$ 1,213,367
A & E Reimbursable Expenses		\$ 22,588	\$ 271	\$ 0	\$ 271
Commissioning		\$ 56,470	\$ 42,420	\$ 1,000	\$ 43,420
Printing & Plan Distribution		\$ 2,500	\$ -	\$ -	\$ -
Hazardous Materials Consultant	13	\$ 56,470	\$ 79,820	\$ 13,200	\$ 93,020
Constructability Review		\$ 56,470	\$ 75,000	\$ 470	\$ 75,470
Plan Review & Building Permits		\$ 112,941	\$ 640,326	\$ 8,448	\$ 648,774
Special Inspection and Testing		\$ 79,059	\$ 144,118	\$ 38,102	\$ 182,220
Miscellaneous Fees	13,14	\$ 45,176	\$ 99,456	\$ 1,978	\$ 101,434
Ed Specs		\$ 22,588	\$ -	\$ -	\$ -
Kitchen		\$ -	\$ -	\$ -	\$ -
Miscellaneous					
Legal Advertisements		\$ 2,000	\$ -	\$ -	\$ -
Furniture, Fixtures, and Equipment (FF&E)		\$ 564,704	\$ 586,301	\$ (3,362)	\$ 582,939
Technology		\$ 112,941	\$ -	\$ -	\$ -
Technology (Design)		\$ 56,470	\$ 5,404	\$ 96	\$ 5,500
Acoustics		\$ 16,941	\$ -	\$ -	\$ -
Criminal Background Checks		\$ 2,000	\$ -	\$ -	\$ -
System Development Charges	13,14	\$ 112,941	\$ -	\$ -	\$ -
Value Engineering		\$ 56,470	\$ -	\$ -	\$ -
Utility Connection Fee		\$ -	\$ -	\$ -	\$ -
Unallocated Owner Contingency		\$ 1,129,408	\$ -	\$ -	\$ -
Inflation		\$ 921,871	\$ -	\$ -	\$ -
Sub Total Soft Cost		\$ 4,992,297	\$ 2,935,673	\$ 60,093	\$ 2,995,766
Total Project Cost		\$ 16,286,381	\$ 18,303,429	\$ (172,592)	\$ 18,130,837

- 12. ReAllocated within Budget (09.30.22)
- 13. ReAllocated within Budget (01.31.23)
- 14. Costs were recategorized (04.30.23)



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
WALKER ELEMENTARY SCHOOL BUDGET
JUNE 30, 2025**

Project Expense		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Hard Cost					
Maximum Allowable Construction Cost (MACC)	15	\$ 8,533,000	\$ 26,829,423	\$ 197,268	\$ 27,026,691
Asbestos		\$ 42,535	\$ -	\$ -	\$ -
Seismic Retro Upgrade		\$ 2,250,000	\$ 1,535,626	\$ 77,795	\$ 1,613,421
Science Works		\$ -	\$ 88,667	\$ 333	\$ 89,000
Modular Rental		\$ -	\$ 1,676,661	\$ (188,236)	\$ 1,488,425
Construction Contingency	15	\$ 426,650	\$ -	\$ (0)	\$ (0)
Construction Sub Total		\$ 11,252,185	\$ 30,130,377	\$ 87,160	\$ 30,217,537
Soft Cost					
Administrative Cost					
Legal Fees		\$ 15,000	\$ -	\$ -	\$ -
Bond Counsel		\$ -	\$ -	\$ -	\$ -
Bond Issuance Cost		\$ -	\$ -	\$ -	\$ -
Builders Risk Insurance	14	\$ -	\$ 69,257	\$ (8,057)	\$ 61,200
Project Management		\$ 270,066	\$ -	\$ -	\$ -
Reimbursable Expenses		\$ 18,004	\$ -	\$ -	\$ -
Communications		\$ -	\$ -	\$ -	\$ -
Sustainability		\$ -	\$ -	\$ -	\$ -
Site Cost					
Site Survey		\$ 90,022	\$ 28,177	\$ 1,637	\$ 29,814
Geo-Tech Report		\$ 18,004	\$ 26,462	\$ (0)	\$ 26,462
Planning Cost					
Design Fees	14	\$ 1,150,218	\$ 1,986,657	\$ (19,165)	\$ 1,967,492
A & E Reimbursable Expenses		\$ 18,004	\$ 415	\$ 17,589	\$ 18,004
Commissioning		\$ 45,011	\$ 92,144	\$ (18,259)	\$ 73,885
Printing & Plan Distribution		\$ 2,000	\$ 945	\$ 55	\$ 1,000
Hazardous Materials Consultant		\$ 90,022	\$ 147,085	\$ 4,537	\$ 151,622
Construction Testing		\$ -	\$ -	\$ -	\$ -
Constructability Review		\$ 45,011	\$ 75,000	\$ -	\$ 75,000
Plan Review & Building Permits		\$ 90,022	\$ 892,242	\$ 4,718	\$ 896,960
Special Inspection and Testing	14	\$ 63,015	\$ 139,809	\$ (26,719)	\$ 113,090
Miscellaneous Fees	16,17	\$ 36,009	\$ 418,679	\$ (132,529)	\$ 286,150
Ed Specs		\$ 18,004	\$ -	\$ -	\$ -
Kitchen		\$ -	\$ -	\$ -	\$ -
Miscellaneous					
Legal Advertisements		\$ 2,000	\$ -	\$ -	\$ -
Furniture, Fixtures, and Equipment (FF&E)	14	\$ 450,109	\$ 868,562	\$ 3,338	\$ 871,900
Technology	14	\$ 90,022	\$ 238,419	\$ 4,202	\$ 242,621
Technology (Design)		\$ 45,011	\$ -	\$ -	\$ -
Acoustics		\$ 13,503	\$ -	\$ -	\$ -
Criminal Background Checks		\$ 1,200	\$ -	\$ -	\$ -
System Development Charges	16	\$ -	\$ -	\$ -	\$ -
Value Engineering		\$ -	\$ -	\$ -	\$ -
Utility Connection Fee		\$ -	\$ -	\$ -	\$ -
Unallocated Owner Contingency		\$ 1,125,273	\$ -	\$ -	\$ -
Inflation		\$ 746,863	\$ -	\$ -	\$ -
Sub Total Soft Cost		\$ 4,442,393	\$ 4,983,854	\$ (168,653)	\$ 4,815,200
Total Project Cost		\$ 15,694,578	\$ 35,114,231	\$ (81,494)	\$ 35,032,737

- 10. Reallocated Bond Issuance Costs back to Program Level (06.30.22)
- 11. Reallocated within Budget (06.30.22)
- 12. Reallocated within Budget (08.31.22)
- 13. Increase budget with Investment Income (08.31.22)
- 14. Increase budget with Investment Income (03.31.23)
- 15. Reallocated within Budget (03.31.23)
- 16. Costs were recategorized (04.30.23)
- 17. Reallocated within Budget (04.30.23)



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
ASHLAND MIDDLE SCHOOL BUDGET
JUNE 30, 2025**

Project Expense		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Hard Cost					
Maximum Allowable Construction Cost (MACC)	18	\$ 20,500,000	\$ 35,813,522	\$ (366,146)	\$ 35,447,376
Asbestos		\$ 384,870	\$ -	\$ -	\$ -
Seismic Retro Upgrade		\$ -	\$ -	\$ -	\$ -
1.5% Solar (Total Project Major Building)		\$ -	\$ -	\$ -	\$ -
Construction Contingency		\$ 1,075,400	\$ -	\$ 0	\$ 0
Construction Sub Total		\$ 21,960,270	\$ 35,813,522	\$ (366,146)	\$ 35,447,376
Soft Cost					
Administrative Cost					
Legal Fees		\$ 20,000	\$ -	\$ -	\$ -
Bond Counsel		\$ -	\$ -	\$ -	\$ -
Bond Issuance Cost		\$ -	\$ -	\$ -	\$ -
Builders Risk Insurance		\$ -	\$ -	\$ -	\$ -
Project Management		\$ 658,808	\$ -	\$ -	\$ -
Reimbursable Expenses		\$ 43,921	\$ -	\$ -	\$ -
Communications		\$ -	\$ -	\$ -	\$ -
Sustainability		\$ -	\$ -	\$ -	\$ -
Site Cost					
Site Survey	17	\$ 43,921	\$ 24,226	\$ 690	\$ 24,916
Geo-Tech Report		\$ 43,921	\$ 37,264	\$ 2,736	\$ 40,000
Planning Cost					
Design Fees		\$ 2,196,027	\$ 2,359,606	\$ 83,084	\$ 2,442,690
A & E Reimbursable Expenses		\$ 43,921	\$ 34,400	\$ 35,600	\$ 70,000
Commissioning		\$ 87,841	\$ 53,220	\$ -	\$ 53,220
Printing & Plan Distribution		\$ 15,372	\$ -	\$ -	\$ -
Hazardous Materials Consultant		\$ 87,841	\$ 149,293	\$ 2,057	\$ 151,350
Construction Testing		\$ -	\$ -	\$ -	\$ -
Constructability Review		\$ 65,881	\$ 88,403	\$ -	\$ 88,403
Plan Review & Building Permits		\$ 219,603	\$ 1,127,525	\$ 186	\$ 1,127,711
Special Inspection and Testing		\$ 153,722	\$ 115,193	\$ 3,749	\$ 118,942
Miscellaneous Fees	17	\$ 87,841	\$ 300,136	\$ (20,886)	\$ 279,250
Ed Specs		\$ 32,940	\$ -	\$ -	\$ -
Kitchen		\$ 32,940	\$ -	\$ -	\$ -
Miscellaneous					
Legal Advertisements		\$ 2,000	\$ -	\$ -	\$ -
Furniture, Fixtures, and Equipment (FF&E)		\$ 1,098,014	\$ 1,154,444	\$ (4,444)	\$ 1,150,000
Technology	16	\$ 109,801	\$ 56,821	\$ 15,964	\$ 72,785
Technology (Design)		\$ 109,801	\$ -	\$ -	\$ -
Acoustics		\$ 32,940	\$ -	\$ -	\$ -
Criminal Background Checks		\$ 2,000	\$ -	\$ -	\$ -
System Development Charges		\$ 219,603	\$ 4,350	\$ (600)	\$ 3,750
Value Engineering		\$ 65,881	\$ -	\$ -	\$ -
Utility Connection Fee		\$ -	\$ -	\$ -	\$ -
Unallocated Owner Contingency		\$ 2,745,034	\$ -	\$ -	\$ -
Inflation		\$ 1,810,791	\$ -	\$ -	\$ -
Sub Total Soft Cost		\$ 10,030,365	\$ 5,504,880	\$ 118,137	\$ 5,623,017
Total Project Cost		\$ 31,990,635	\$ 41,318,402	\$ (248,009)	\$ 41,070,393

- 15. Reallocated within Budget (01.31.23)
- 16. Reallocated \$26k from Security (03.31.23)
- 17. Reallocated within Budget (05.31.23)
- 18. Reallocated from Investment Inc (06.30.23)



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
WILLOW WIND LEARNING CENTER
JUNE 30, 2025**

Project Expense		Original Budget	Paid to Date	Remaining Balance	Revised Budget
Hard Cost					
Maximum Allowable Construction Cost (MACC)	4,8	\$ -	\$ 1,732,696	\$ 1,732	\$ 1,734,428
Other Contractor Costs		\$ -	\$ -	\$ -	\$ -
		\$ -	\$ -	\$ -	\$ -
		\$ -	\$ -	\$ -	\$ -
Construction Contingency		\$ -	\$ -	\$ -	\$ -
Construction Sub Total		\$ -	\$ 1,732,696	\$ 1,732	\$ 1,734,428
Soft Cost					
Administrative Cost					
Legal Fees		\$ -	\$ -	\$ -	\$ -
Bond Counsel		\$ -	\$ -	\$ -	\$ -
Bond Issuance Cost		\$ -	\$ -	\$ -	\$ -
Builders Risk Insurance		\$ -	\$ -	\$ -	\$ -
Project Management		\$ -	\$ -	\$ -	\$ -
Reimbursable Expenses		\$ -	\$ -	\$ -	\$ -
Communications		\$ -	\$ -	\$ -	\$ -
Sustainability		\$ -	\$ -	\$ -	\$ -
Site Cost					
Site Survey		\$ -	\$ -	\$ -	\$ -
Geo-Tech Report		\$ -	\$ -	\$ -	\$ -
Planning Cost					
Design Fees	5	\$ -	\$ 128,412	\$ (351)	\$ 128,061
A & E Reimbursable Expenses		\$ -	\$ -	\$ -	\$ -
Commissioning		\$ -	\$ 21,500	\$ 284	\$ 21,784
Printing & Plan Distribution		\$ -	\$ -	\$ -	\$ -
Hazardous Materials Consultant		\$ -	\$ 10,894	\$ -	\$ 10,894
Construction Testing		\$ -	\$ -	\$ -	\$ -
Constructability Review		\$ -	\$ -	\$ -	\$ -
Plan Review & Building Permits		\$ -	\$ 37,164	\$ (1,844)	\$ 35,320
Special Inspection and Testing		\$ -	\$ 3,833	\$ 0	\$ 3,833
Miscellaneous Fees	6,7	\$ -	\$ 54,272	\$ 3,994	\$ 58,266
Ed Specs		\$ -	\$ -	\$ -	\$ -
Kitchen		\$ -	\$ -	\$ -	\$ -
Miscellaneous					
Legal Advertisements		\$ -	\$ -	\$ -	\$ -
Furniture, Fixtures, and Equipment (FF&E)		\$ -	\$ 8,535	\$ 465	\$ 9,000
Technology		\$ -	\$ -	\$ -	\$ -
Technology (Design)		\$ -	\$ -	\$ -	\$ -
Acoustics		\$ -	\$ -	\$ -	\$ -
Criminal Background Checks		\$ -	\$ -	\$ -	\$ -
System Development Charges		\$ -	\$ 15,342	\$ -	\$ 15,342
Value Engineering		\$ -	\$ -	\$ -	\$ -
Utility Connection Fee		\$ -	\$ -	\$ -	\$ -
Unallocated Owner Contingency	5	\$ -	\$ -	\$ -	\$ -
Inflation		\$ -	\$ -	\$ -	\$ -
Sub Total Soft Cost		\$ -	\$ 279,952	\$ 2,548	\$ 282,500
Total Project Cost		\$ -	\$ 2,012,648	\$ 4,280	\$ 2,016,928

- 2. ReAllocated costs within budget (08.01.21)
- 2. ReAllocated costs within budget (08.01.21)
- 3. \$79,500 moved to WES (12.31.21)
- 4. ReAllocated costs within budget (03.31.22)
- 5. ReAllocated costs within budget (08.31.22)
- 6. ReAllocated costs from Investment Inc (09.30.22)
- 7. ReAllocated costs from Investment Inc (05.31.23)



**ASHLAND SCHOOL DISTRICT
CAPITAL CONSTRUCTION
DISTRICT WIDE SOLAR PROJECT
JUNE 30, 2025**

Project Expense	Original Budget	Paid to Date	Remaining Balance	Revised Budget
Hard Cost				
1.5% Solar (Walker Elementary)	\$ -	\$ 280,779	\$ 1,619	\$ 282,398
1.5% Solar (Helman Elementary)	\$ -	\$ 250,000	\$ -	\$ 250,000
1.5% Solar (Ashland Middle School)	2,3,4 \$ -	\$ 401,106	\$ 17,294	\$ 418,400
1.5% Solar (Ashland High School)	\$ -	\$ -	\$ 200,000	\$ 200,000
1.5% Solar (Willow Wind Learning Center)	\$ -	\$ -	\$ -	\$ -
Construction Contingency	1,5 \$ -	\$ -	\$ 500,000	\$ 500,000
Construction Sub Total	\$ -	\$ 931,886	\$ 718,912	\$ 1,650,798
Soft Cost				
Administrative Cost				
Legal Fees	\$ -	\$ -	\$ -	\$ -
Bond Counsel	\$ -	\$ -	\$ -	\$ -
Bond Issuance Cost	\$ -	\$ -	\$ -	\$ -
Builders Risk Insurance	\$ -	\$ -	\$ -	\$ -
Project Management	\$ -	\$ -	\$ -	\$ -
Reimbursable Expenses	\$ -	\$ -	\$ -	\$ -
Communications	\$ -	\$ -	\$ -	\$ -
Sustainability	\$ -	\$ -	\$ -	\$ -
Site Cost				
Site Survey	3 \$ -	\$ 13,100	\$ (9,100)	\$ 4,000
Geo-Tech Report	\$ -	\$ -	\$ -	\$ -
Planning Cost				
Design Fees	2,3,4 \$ -	\$ 80,100	\$ (10,500)	\$ 69,600
A & E Reimbursable Expenses	\$ -	\$ -	\$ -	\$ -
Commissioning	\$ -	\$ -	\$ -	\$ -
Printing & Plan Distribution	\$ -	\$ -	\$ -	\$ -
Hazardous Materials Consultant	\$ -	\$ -	\$ -	\$ -
Construction Testing	\$ -	\$ -	\$ -	\$ -
Constructability Review	\$ -	\$ -	\$ -	\$ -
Plan Review & Building Permits	3,4,5 \$ -	\$ 43,827	\$ 14,173	\$ 58,000
Special Inspection and Testing	\$ -	\$ -	\$ -	\$ -
Miscellaneous Fees	\$ -	\$ 1,989	\$ (1,989)	\$ -
Ed Specs	\$ -	\$ -	\$ -	\$ -
Kitchen	\$ -	\$ -	\$ -	\$ -
Miscellaneous				
Legal Advertisements	\$ -	\$ -	\$ -	\$ -
Furniture, Fixtures, and Equipment (FF&E)	\$ -	\$ -	\$ -	\$ -
Technology	\$ -	\$ -	\$ -	\$ -
Technology (Design)	\$ -	\$ -	\$ -	\$ -
Acoustics	\$ -	\$ -	\$ -	\$ -
Criminal Background Checks	\$ -	\$ -	\$ -	\$ -
System Development Charges	\$ -	\$ -	\$ -	\$ -
Value Engineering	\$ -	\$ -	\$ -	\$ -
Utility Connection Fee	\$ -	\$ -	\$ -	\$ -
Unallocated Owner Contingency	\$ -	\$ -	\$ -	\$ -
Inflation	\$ -	\$ -	\$ -	\$ -
Sub Total Soft Cost	\$ -	\$ 139,016	\$ (7,416)	\$ 131,600
Total Project Cost	\$ -	\$ 1,070,902	\$ 711,496	\$ 1,782,398

- 1. ReAllocated from Investment Inc (09.30.22) \$1,897,106
- 2. ReAllocated within Budget (09.30.22) \$ (114,708.00)
- 3. ReAllocated within Budget (04.30.23)
- 4. ReAllocated within Budget (06.30.23)



ASHLAND ATTAINABLE HOUSING

ASHLAND SCHOOL BOARD | AUGUST 2025



ASHLAND ATTAINABLE HOUSING ASB MEETING AGENDA



- Review of project targets, goals, and outcomes as outlined in the 2024 RFP solicitation.
- Review of work completed to date.
- Overview of project evolution, challenges, and opportunities.
- Next Steps.



ASHLAND ATTAINABLE HOUSING OUTLINED PROJECT GOALS

- Public-Private Partnership (“PPP”) structure between the Development Team and the Ashland School District – collectively referred to herein as the “Team”.
- The Team will leverage existing land assets for the development of a new housing project aimed at (a) *increasing student enrollment* and (b) *supporting teachers and staff of the district*.
- The project will focus on critically needed housing that prioritizes affordability, with a particular emphasis on serving low- to middle-income families and teachers.
 - <80% Area Median Income (“AMI”)
 - 80%-120% AMI
- Create a diverse mix of housing units and types that serve a wide range of residents, from single individuals to families.
 - Studio, (1) Bedroom, (2) Bedroom, (3) Bedroom.
- Include programming such as childcare, play facilities, resident services, etc., to support the target resident groups.

ASHLAND ATTAINABLE HOUSING

EARLY DESIGN PERIOD (JANUARY - JULY)



- Starting in January 2025, the Development/Sunstone team began holding regular project meetings to develop and implement a strategy focused on a Community-Led Design process. From March to May 2025, a series of public meetings were conducted with key stakeholders within the community and targeted resident groups.
 - The purpose of these meetings was twofold: (a) *to create a forum for stakeholders to learn more about the project and ask questions of the development team*, and (b) *to outline project goals and gather feedback on the design, site programming, etc., to guide the design direction.*
 - Stakeholders included the broader Ashland community, teachers/staff, civic leaders, etc.
- Alongside this process, the team has been seeking grants and other funding sources to support project financing. Despite changes in federal support, the project has secured nearly \$1 million in grant funding, and we continue to pursue additional non-dilutive funding sources.
- Following successful negotiations between the Development team and ASD, ASD and the Development Team executed an Exclusive Negotiation Agreement (“ENA”) and commenced early diligence and design work to incorporate feedback from the community and stakeholders.
- The project has been submitted for early planning review with the City of Ashland for feedback and has received strong support from the city to ensure the project’s success.

ASHLAND ATTAINABLE HOUSING

CURRENT PROJECT PROGRAMMING



- In July 2025, the Team commenced early Schematic Design (“SD”) in response to the community-led design process and project goals, resulting in:
 - Increasing (2) and (3) bedrooms
 - Detailed programming of Community Land Trust (CLT) components
 - Detailed programming of Early Childhood Education (“ECE”) Center
- Based on available funding today, the project will require (3) separately financed components:
 - **CLT Home Ownership** - 12-14 units
 - **4% Tax-Credit Financed Multifamily Rental (30-80% AMI)** – 75-80 Units
 - **ECE + Dedicated Play Area**
- Key focus on accessibility and environmental resiliency throughout the project.
- Programmed amenities: accessible playground, community room, public gathering spaces/micro parks, and resident services (TBD).



ASHLAND ATTAINABLE HOUSING NEXT STEPS

- **August 14th** – Development Team to present to ASB project status.
- **August – Early Fall:** Development Team to finalize early site diligence, revised project concepting, and updated pricing.
- **Fall Meeting W/ ASB (TBD):** Meeting to review project scope and considerations necessary for term sheet/Development and Disposition Agreement (“DDA”) negotiations.
- **Term Sheet Draft / DDA Framework:** The parties will review project financials, goals, and targeted outcomes to incorporate in a term sheet for negotiation, which will serve as the foundation for the DDA.

ASHLAND SCHOOL DISTRICT PROGRAM UPDATE

2025-26

Program Structures

and

Professional Development Plan

Elementary School Programs

- Increase in number of multiage classrooms across the district
- Grade band blends: K/1, 2/3, 4/5
(The specific combinations will vary by school based on enrollment needs)

Implementation Models

Subject Specialization Model

Teachers specialize in specific subject areas (e.g., one focuses on math, another on reading/writing). Students within a grade band rotate between teachers for core subjects while maintaining a consistent homeroom.

Homeroom-Based Model

Students stay with their homeroom teacher for all subjects, with additional staff providing small group instruction and supporting learning at different levels.

Middle School Restructuring

New Team Structure

- Two larger 7/8 teams, each serving ~145 students
- Each team staffed with dedicated teachers in Language Arts, Math, Science, Social Studies, and Spanish
- A third, smaller team serving a focused group of students, providing integrated instruction across core subjects along with additional academic support.

Elective Changes

- Reduced number of Encore class periods
- Leadership no longer offered as an Encore class

Continuing Strengths

- Maintaining two-year looping model
 - Preserving the 6th grade team model with two academic teams
 - Supporting stronger relationships and academic continuity
-

High School Programs

Staffing changes at Ashland High School have been determined based on:

- Average class size targets of 25 students
- Student enrollment numbers
- Student interest as indicated through the forecasting process
- Course requests and student preferences

While some shifts and reductions in staffing have occurred, major program changes have not taken place.

Professional Development Focus Areas

Professional Learning Communities (PLCs)

- Provide support to leaders to increase effectiveness and efficacy of PLCs at buildings and across the district

Science of Reading

- Elementary: continue to improve instruction aligned with Science of Reading and Writing. Implement new ELA Curriculum
- Secondary: build knowledge base and instructional practice implementation

Equitable Mindsets, Systems and Practices

- Continue with integration of Universal Design for Learning (UDL) strategies to ensure Tier I access for all learners in all courses/classrooms

MONTHLY SCHOOL BOARD FINANCIAL REPORT

Ashland School District No. 5
Financial Data through the Month Ending June 30, 2025
Updated as of 8.7.2025



August 14, 2025
Board Meeting

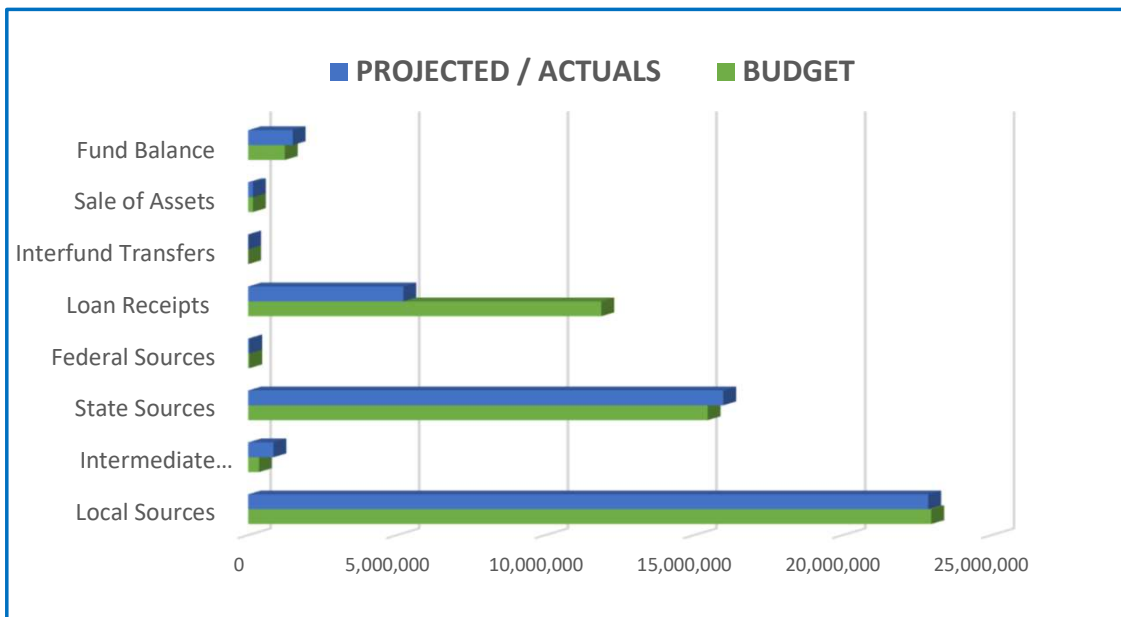
Presented By: Sherry Ely, Director of Business Services

2025.2026 GENERAL FUND (100)

REVENUE

Financial Data Ending July 30, 2025

REVENUE SOURCES BY FUNCTION		BUDGET	PROJECTED / ACTUALS	(Over)/Under Budget
Local Sources	1000	22,974,370.00	22,870,950.95	103,419.05
Intermediate Sources	2000	365,000.00	850,000.00	(485,000.00)
State Sources	3000	15,459,445.00	15,982,614.60	(523,169.60)
Federal Sources	4000	40,000.00	40,000.00	0.00
Loan Receipts	5150	11,880,000.00	5,220,000.00	6,660,000.00
Interfund Transfers	5200	0.00	0.00	0.00
Sale of Assets	5300	160,000.00	160,000.00	0.00
Fund Balance	5400	1,235,405.00	1,500,000.00	(264,595.00)
		52,114,220.00	46,623,565.55	5,490,654.45



NOTES

REVENUE: With only one month of revenue recorded - the projections are right in line with what we have budgeted. At this point of the year, I am not seeing that there is going to be any great deviation from the amounts we budgeted other than what we budgeted for SOESD flow through revenue (Intermediate Sources) and the State School Fund. The June estimate has our SSF revenue about \$525K higher than the March estimate that was used in our budget. I have adjusted projections to reflect an increase in flow through dollars we will be receiving through the ESD as well as the increase in SSF as per the June estimate from ODE.

Local Sources Include: Property Taxes, Reimbursements, Fees, and other Misc. Revenue.

Intermediate Sources Include: Flowthrough from ESD.

Federal Sources include: Federal Forest Fees

Sale of Assets include: Payment for the Sale of Briscoe

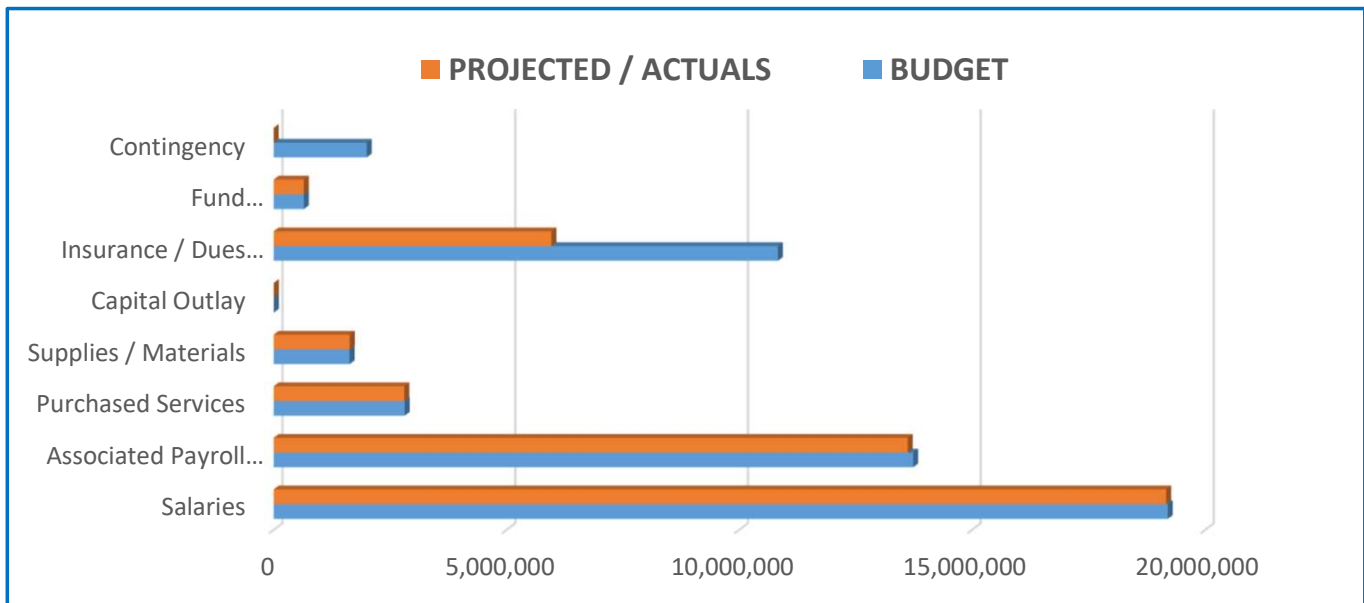
Source	2025.2026 Budget	Actual YTD Rev. 07.31.2025	Projected through 06.30.2026	Total Estimated 2025.2026	(Over)/Under Budget	Actual YTD Rev. 06.30.2025	2024.2025 Budget	(Over)/Under Budget
SSF Funding								
1111 Current Year Property Taxes	17,000,000	76,130	16,923,870	17,000,000	(0)	16,685,098	17,475,000	789,902
1112 Delinquent Property Tax	-	-	-	-	-	-	-	-
1190 Penalties & Interest on Taxes	9,500	74	9,500	9,574		10,280		(10,280)
3101 State School Support Funds	15,101,626	2,604,653	13,020,143	15,624,796	(523,170)	14,832,002	14,004,000	(828,002)
3101 SSF - Due to ODE		-	-	-	-	-		-
3103 Common School Fund	357,819	-	357,819	357,819	-	348,739	354,000	5,261
Total SSF Funding	32,468,945	2,680,857	30,311,332	32,992,188	(523,170)	31,876,119	31,833,000	(43,119)
Total SSF Revenue	\$ 32,468,945	\$ 2,680,857	\$ 30,311,332	\$ 32,992,188	\$ (523,170)	\$ 31,876,119	31,833,000	(43,119)
Non State School Support Formula Sources								
Local Sources								
1120 Local Option	4,800,000	21,660	4,778,340	4,800,000	(0)	4,717,915	5,200,000	482,085
1123 Local Option Penalties & Interest	2,700	21	2,700	2,721	(21)	2,912		(2,912)
1311 and 1312 Tuition	50,000	-	50,000	50,000	(0)	43,044	50,000	6,956
1412 Transportation Fees	17,500	-	17,500	17,500	-	18,684	25,000	6,316
1510 Earnings on Investments	750,000	30,911	719,089	750,000	(0)	660,557	900,000	239,443
1740 Fees	1,200	250	1,071	1,321	(121)	2,010	-	(2,010)
1910 Rentals	18,320	30,120	18,320	48,440	(30,120)	34,736	75,000	40,265
1920 Donations from Private Sources	25,100	-	25,100	25,100	(0)	907,657	25,000	(882,657)
1940 Serv Provided to Other districts	20,000	-	18,714	18,714	1,286	6,385	25,000	18,615
1960 Recovery of Prior Year Expenditures	15,000	9,775	13,750	23,525	(8,525)	14,747	10,000	(4,747)
1980 Fees Charged to Grants	150,000	-	91,864	91,864	58,136	139,797	300,000	160,203
1990 Miscellaneous Local Revenue	115,050	1,215	30,976	32,191	82,859	119,056	100,000	(19,056)
Total Non Formula Local Sources	5,964,870	93,952	5,767,425	5,861,377		6,667,498	6,710,000	42,502
Intermediate Sources								
2199 - Other Inter. Sources	365,000	-	850,000	850,000		819,410	800,000	(19,410)
Total Intermediate Sources	365,000	-	850,000	850,000	-	819,410	800,000	(19,410)
State/Federal Sources								
3299 Rest. From state	-	-	-	-		-	150,000	150,000
4700 Federal Rev	10,000	-	10,000	10,000			10,000	10,000
4801 Federal Forest	30,000	-	30,000	30,000		40,000	30,000	(10,000)
Total State/Federal Sources	40,000	-	40,000	40,000	-	40,000	190,000	150,000
Other Sources								
5150 Loan Receipts	11,880,000		5,220,000	5,220,000		2,124,188		
5300 Sale/Loss of Fixed Assets	160,000	-	160,000	160,000	-	160,000	160,000	-
5400 Beginning Fund Balance	1,235,405	-		1,500,000	(264,595)	(2,004,188)	1,000,000	3,004,188
Total Other Sources	13,275,405	-	160,000	6,880,000	(264,595)	280,000	1,160,000	880,000
Total Non SSF Revenue	\$ 19,645,275	\$ 93,952	\$ 6,817,425	\$ 13,631,377	\$ (264,595)	\$ 7,806,908	\$ 8,860,000	1,053,092
Total Resources	\$ 52,114,220	\$ 2,774,809	\$ 37,128,756	\$ 46,623,566	\$ 5,490,654	\$ 39,683,027	\$ 40,693,000	1,009,973
						\$ 39,683,022		
		Less Estimated Requirements		\$ 43,855,077		Estimated 24.25 EFB		1,458,426
		Estimated Ending Fund Balance		\$ 2,768,489				

2025.2026 GENERAL FUND (100)

EXPENSES

Financial Data Ending July 30, 2025

EXPENSES BY OBJECT	BUDGET	PROJECTED / ACTUALS	(Over)/Under Budget	
Salaries	100	19,201,356.00	19,164,190.99	37,165.01
Associated Payroll Costs	200	13,739,894.00	13,624,190.76	115,703.24
Purchased Services	300	2,815,114.00	2,806,025.37	9,088.63
Supplies / Materials	400	1,631,221.00	1,635,537.73	(4,316.73)
Capital Outlay	500	6,000.00	6,000.00	0.00
Insurance / Dues / Fees/Loan Pmnt	600	10,835,182.00	5,969,131.98	4,866,050.02
Fund Transfers/Flow Thru	700	650,000.00	650,000.00	0.00
Contingency	800	2,000,000.00	0.00	2,000,000.00
		50,878,767.00	43,855,076.82	7,023,690.18



NOTES

EXPENSE: The projected expenditures are very preliminary as we have to finish loading in all of the encumbrances - so adjustments I have made to expenditures are based on prior year activity. Once we run a September payroll, I will have greater confidence in the encumbrances on the payroll side. Also - I am more confident that we will not have to take anymore draws on the loan. So - at this very preliminary point in the year - I am estimating our Ending Fund Balance to come in at \$2,768,489- 6.31% of projected expenditures. And - again - I want to reiterate - these are VERY preliminary numbers.

	2025.2026	Actual YTD EXP	Projected through	Total Estimated		%		2024.2025 YTD	(Over)/Under
	Budget	07.31.2025	06.30.2025	2025.2026	(Over)/ Under	Committed	2024.2025 Budget	Expense	Budget
Instruction									
1111 Elementary, K-5 or K-6	6,128,132.00	2,733.60	6,065,251.63	6,067,985.23	60,146.77	0.99	6,538,879.78	6,372,853.06	166,026.72
1113 Elementary Extracurricular	9,058.00	455.06	8,602.94	9,058.00			5,486.80	10,164.13	-4,677.33
1121 Middle/Junior High Programs	3,505,613.00	3,894.83	3,445,050.78	3,448,945.61	56,667.39	0.98	4,073,027.82	3,883,237.01	189,790.81
1122 Middle/Junior High School Extracurricular	261,926.00	0.00	261,926.00	261,926.00	0.00	1.00	250,512.57	237,170.30	13,342.27
1131 High School Programs	5,568,609.00	5,777.49	5,505,312.23	5,511,089.72	57,519.28	0.99	5,378,092.35	5,017,450.91	360,641.44
1132 High School Extracurricular	945,412.00	7,674.09	937,738.00	945,412.09	-0.09	1.00	1,001,075.58	789,165.23	211,910.35
1210 Programs for the Talented and Gifted	3,570.00	0.00	3,570.00	3,570.00	0.00	1.00	11,871.50	8,933.85	2,937.65
1220 Restrictive Pgms for Students w/Disabilities	84,405.00	0.00	82,401.26	82,401.26	2,003.74	0.98	77,941.05	65,487.33	12,453.72
1227 Extended School Year	480.00	0.00	480.00	480.00			5,000.00	2,961.46	2,038.54
1250 Programs for Students w/Severe Disabilities	3,769,521.00	3,186.48	3,936,054.03	3,939,240.51	-169,719.51	1.05	4,250,889.56	3,741,598.91	509,290.65
1280 Alternative Education	1,718,133.00	417.02	1,717,225.87	1,717,642.89	490.11	1.00	1,695,037.18	1,630,659.77	64,377.41
1291 English Second Language Programs	300,404.00	0.00	299,430.71	299,430.71	973.29	1.00	144,493.32	124,504.85	19,988.47
1400 Summer School		7,560.05	0.00	7,560.05	-7,560.05			2,477.39	
Total Instruction	22,295,263.00	31,698.62	22,263,043.45	22,294,742.07	520.93		23,432,307.51	21,886,664.20	1,545,643.31
	22,295,263.00	31,698.62	22,263,043.45	22,287,182.02					
Support Services									
2110 Attendance and Social Work Services	68,188.00	0.00	63,712.75	63,712.75	4,475.25	0.93	60,641.00	60,306.77	334.23
2115 Student Safety	0.00	0.00	0.00	0.00	0.00		0.00	0.00	0.00
2120 Guidance Services	843,276.00	349.19	841,109.78	841,458.97	1,817.03	1.00	815,859.32	744,028.35	71,830.97
2130 Health Services	474,530.00	0.00	474,488.56	474,488.56	41.44	1.00	307,844.00	157,413.67	150,430.33
2140 Psychological Services	117,612.00	0.00	117,612.00	117,612.00	0.00	1.00	251,481.64	154.00	251,327.64
2150 Speech Pathology and Audiology Services	276,911.00	9,695.00	266,843.92	276,538.92	372.08	1.00	443,149.54	552,920.96	-109,771.42
2190 Service Directions, Student Support Svcs	520,690.00	32,383.80	483,341.06	515,724.86	4,965.14	0.99	421,685.00	492,578.18	-70,893.18
2210 Improvement of Instruction Services	116,089.00	10,046.13	104,672.81	114,718.94	1,370.06	0.99	109,473.27	167,697.88	-58,224.61
2220 Library/Media Center	269,676.00	92.53	260,691.60	260,784.13	8,991.87	0.97	295,932.60	262,994.95	32,937.65
2230 Assessment and Testing	86,850.00	0.00	86,850.00	86,850.00	0.00	1.00	8,150.00	202,446.74	-194,296.74
2240 Staff Development	22,773.00	9,125.00	13,648.00	22,773.00	0.00	1.00	59,565.00	18,109.54	41,455.46
2310 Board of Education	221,555.00	121,446.18	100,108.82	221,555.00	0.00	1.00	200,218.00	280,040.98	-79,822.98
2320 Office of the Superintendent Services	469,851.00	42,289.62	426,710.17	468,999.79	851.21	1.00	460,535.82	469,399.80	-8,863.98
2410 Office of the Principal Services	3,089,689.00	181,847.38	2,907,444.82	3,089,292.20	396.80	1.00	3,249,747.11	3,008,375.55	241,371.56
2490 Other Support Services—School Administration	143,729.00	0.00	142,922.60	142,922.60	806.40		900.00	129,227.87	-128,327.87
2520 Fiscal Services	690,003.00	127,988.00	561,291.49	689,279.49	723.51	1.00	698,011.86	847,082.37	-149,070.51
2540 Maintenance	4,217,104.00	817,776.94	3,399,327.06	4,217,104.00	0.00		4,285,988.28	4,209,493.92	76,494.36
2543 Care and Upkeep of Grounds Services	22,000.00	150.00	21,850.00	22,000.00	0.00	1.00	39,000.00	35,880.03	3,119.97
2550 Student Transportation Services	1,190,376.00	60,592.99	1,129,783.01	1,190,376.00	0.00	1.00	1,212,285.73	1,437,419.46	-225,133.73
2640 Staff Services	493,855.00	55,584.38	438,270.62	493,855.00	0.00	1.00	406,257.66	324,169.99	82,087.67
2660 Technology Services	2,061,443.00	184,685.34	1,876,757.66	2,061,443.00	0.00	1.00	2,130,579.93	2,111,429.84	19,150.09
2700 Supplemental Retirement	317,304.00	28,734.11	290,111.43	318,845.54	-1,541.54		283,386.41	326,766.16	-43,379.75
Total Support Services	15,713,504.00	1,682,786.59	14,007,548.16	15,690,334.75	23,169.25		15,740,692.17	15,837,937.01	-97,244.84
	15,713,504.00	1,682,786.59	14,007,548.16	15,690,334.75	23,169.25	15,690,334.75			
Community Services									
3300 Welfare Activities Services	0.00	0.00	0.00	0.00			5,000.00	0.00	5,000.00
Total Community Services	0.00	0.00	0.00	0.00	0.00	0.00	5,000.00	0.00	5,000.00
Other Requirements									
5120 Short Term Debt Service	10,220,000.00		5,220,000.00	5,220,000.00					
5200 Transfers of Funds	650,000.00	0.00	650,000.00	650,000.00	0.00	1.00	500,000.00	500,000.00	0.00
		0.00	0.00	0.00	0.00		15,000.00		15,000.00
6000 Contingency	2,000,000.00	0.00	0.00	0.00	2,000,000.00	1.00	1,000,000.00	0.00	1,000,000.00
7000 Unappropriated Ending Fund Balance	1,235,453.00	0.00	0.00	0.00	1,235,453.00	1.00	0.00	0.00	0.00
Total Other Requirements	14,105,453.00	0.00	5,870,000.00	5,870,000.00	3,235,453.00		1,515,000.00	500,000.00	1,015,000.00
		0.00							
Total Requirements	52,114,220.00	1,714,485.21	42,140,591.61	43,855,076.82	8,259,143.18		40,692,999.68	38,224,601.21	2,468,398.47

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Ashland School District_Appropriations

General Fund (100)	Appropriations	YTD	Encumbrances	Totals	Resolutions	(Over)/Under Budget
1000 Instruction	\$ 22,295,263.00	\$ 31,698.62	\$ 22,263,043.45	\$ 22,294,742.07	\$ -	\$ 520.93
2000 Support Services	\$ 15,713,504.00	\$ 1,682,786.59	\$ 14,007,548.16	\$ 15,690,334.75	\$ -	\$ 23,169.25
3000 Community Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
5120 Short Term Debt Service	\$ 10,220,000.00	\$ -	\$ 5,220,000.00	\$ 5,220,000.00	\$ -	\$ 5,000,000.00
5200 Transfers	\$ 650,000.00	\$ -	\$ 650,000.00	\$ 650,000.00	\$ -	\$ -
6000 Contingency	\$ 2,000,000.00	\$ -	\$ -	\$ -	\$ -	\$ 2,000,000.00
Sub Total	\$ 50,878,767.00	\$ 1,714,485.21	\$ 42,140,591.61	\$ 43,855,076.82	\$ -	\$ 7,023,690.18
7000 Unappropriated EFB	\$ 1,235,453.00	\$ -	\$ -	\$ -	\$ -	\$ 1,235,453.00
Donations Fund Raising (105)						
1000 Instruction	\$ 412,948.00	\$ 20,665.87	\$ 1,750.00	\$ 22,415.87	\$ -	\$ 390,532.13
2000 Support Services	\$ 11,990.00	\$ 561.31	\$ -	\$ 561.31	\$ -	\$ 11,428.69
3000 Community Services	\$ 4,900.00	\$ -	\$ -	\$ -	\$ -	\$ 4,900.00
Sub Total	\$ 429,838.00	\$ 21,227.18	\$ 1,750.00	\$ 22,977.18	\$ -	\$ 406,860.82
Class Fees (110)						
1000 Instruction	\$ 260,046.00	\$ 2,054.98	\$ -	\$ 2,054.98	\$ -	\$ 257,991.02
2000 Support Services	\$ 28,324.00	\$ -	\$ -	\$ -	\$ -	\$ 28,324.00
3000 Community Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Sub Total	\$ 288,370.00	\$ 2,054.98	\$ -	\$ 2,054.98	\$ -	\$ 286,315.02
Special Revenue Funds						
1000 Instruction	\$ 3,709,448.00	\$ 10,135.70	\$ 2,388,998.44	\$ 2,399,134.14	\$ -	\$ 1,310,313.86
2000 Support Services	\$ 2,388,745.00	\$ 11,490.83	\$ 1,511,909.90	\$ 1,523,400.73	\$ -	\$ 865,344.27
3000 Community Services	\$ 1,283,100.00	\$ 44,024.16	\$ 1,113,771.15	\$ 1,157,795.31	\$ -	\$ 125,304.69
4000 Facility Acquisition	\$ 40,000.00	\$ -	\$ -	\$ -	\$ -	\$ 40,000.00
5200 Transfers	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
5300 Apportionment of funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Sub Total	\$ 7,421,293.00	\$ 65,650.69	\$ 5,014,679.49	\$ 5,080,330.18	\$ -	\$ 2,340,962.82
Debt Service (301)						
5100 Debt Service	\$ 8,480,400.00	\$ -	\$ 8,480,400.00	\$ 8,480,400.00	\$ -	\$ -
Sub Total	\$ 8,480,400.00	\$ -	\$ 8,480,400.00	\$ 8,480,400.00	\$ -	\$ -
Facilities (400)						
2000 Support Services	\$ 396,515.00	\$ 8,988.42	\$ 27,372.68	\$ 36,361.10	\$ -	\$ 360,153.90
4000 Facilities Acquisition	\$ 7,065,009.00	\$ 169,305.20	\$ 3,080,332.85	\$ 3,249,638.05	\$ -	\$ 3,815,370.95
6000 Contingencies	\$ 3,000,000.00	\$ -	\$ -	\$ -	\$ -	\$ 3,000,000.00
Sub Total	\$ 10,461,524.00	\$ 178,293.62	\$ 3,107,705.53	\$ 3,285,999.15	\$ -	\$ 7,175,524.85

Ashland School District_Appropriations

Internal Service Funds (600)

2000 Support Services	\$ 10,342,014.00	\$ 531,064.60	\$ 8,842,808.78	\$ 9,373,873.38	\$ -	\$ 968,140.62
5200 Transfers	\$ 25,000.00	\$ -	\$ -	\$ -	\$ -	\$ 25,000.00
6000 Contingencies	\$ 859,650.00	\$ -	\$ -	\$ -	\$ -	\$ 859,650.00
Sub Total	<u>\$ 11,226,664.00</u>	<u>\$ 531,064.60</u>	<u>\$ 8,842,808.78</u>	<u>\$ 9,373,873.38</u>	<u>\$ -</u>	<u>\$ 1,852,790.62</u>

Trust & Agency Funds (700)

1000 Instruction	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2000 Support Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3000 Community Services	\$ 285,000.00	\$ -	\$ -	\$ -	\$ -	\$ 285,000.00
6000 Contingency	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Sub Total	<u>\$ 285,000.00</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 285,000.00</u>
7000 Unappropriated EFB	\$ 13,750.00	\$ -			\$ -	

Total Appropriations	<u>\$ 89,471,856.00</u>	<u>\$ 2,512,776.28</u>	<u>\$ 67,587,935.41</u>	<u>\$ 70,100,711.69</u>	<u>\$ -</u>	<u>\$ 19,371,144.31</u>
Total Unappropriated	<u>\$ 1,249,203.00</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 1,249,203.00</u>
TOTAL	<u><u>\$ 90,721,059.00</u></u>	<u><u>\$ 2,512,776.28</u></u>	<u><u>\$ 67,587,935.41</u></u>	<u><u>\$ 70,100,711.69</u></u>	<u><u>\$ -</u></u>	<u><u>\$ 20,620,347.31</u></u>

ASHLAND PUBLIC SCHOOLS

JACKSON COUNTY SCHOOL DISTRICT #5

Dr. Joseph Hatrick
Superintendent



Inspire Learning for Life

MICHELLE CUDEBACK
Assistant Superintendent

STEVE MITZEL
Executive Director, Operations

SHERRY ELY
Director, Business Services

APRIL HARRISON
Director, Student Services

BOARD OF DIRECTORS
REBECCA DYSON
RUSSELL HATCH
DANIEL RUBY
DELTRA FERGUSON
JORDAN ROOKLYN

2025-26 District, Board, and Superintendent Goals

VISION: INSPIRING LEARNING FOR LIFE

MISSION: Empowering students to be lifelong learners, responsible citizens, and stewards of the world.

District Goals			
From Integrated Application Process	Improve Student Achievement Outcomes.	Increase the rate that students, staff, and families report experiencing a safe, welcoming, supportive, and inclusive environment.	Advance Financial Growth and Sustainability.
	+3 rd grade reading in focal groups to 68% by 2028. +Graduation rates for all students to 95% by 2028. +Increase # of students prepared for postsecondary success.	(Climate/Culture)	
	Fully Implement newly adopted K-3 ELA curriculum.	Develop a wholistic data review process to measure progress and develop goals.	Explore before/after school programming options
	Provide equitable access to academic instruction for all students and particularly those in focal groups in grades K-12 (Tier I).	Interpretation and translation services.	Explore additional possibilities for revenue generation and improved student outcomes (Charter, PreK, Lincoln School, etc.).
	Strengthen collaboration with regional partners to expand and provide post-secondary opportunities.	Reduce barriers for participation and access to Superintendent's Advisory Council.	Develop Financial Procedures Manual

Board Goals			
Goal	Informed Decision Making	Build Trust	Advance Financial Growth and Sustainability.
Actions	Utilize data in decision-making. -Post-graduation -Outcome tracking -District data – enrollment, attendance, test data, etc.	Community Outreach -Listening sessions/town hall	YAAL Advocacy
	Apply district equity lens in all decisions.	Communicate programs and needs of the district to community at-large.	Legislative advocacy on State School Fund
	Community and constituent feedback	Provide updates to district/community re: board actions.	Budget & debt relief oversight
	Commit to Board Professional Development.	Complete annual board self-evaluation.	

Superintendent Goals			
Goal	Instructional Leadership and Academic Programs	Climate/culture	Financial Growth and stability
Action Steps	Establish loose/tight expectations	Customer service expectations	Evaluate new reporting software and present new system for clarity.
	Ongoing data review and evaluation	Student-first philosophy	Develop draft repayment schedule and reserve schedule
	Explore innovative strategies to enhance student experience and access to programs including AI.	Develop board primer/annual report that highlights all programs.	Identify/explore revenue sources that will benefit students the district