



Regular Meeting OF THE BOARD OF DIRECTORS

Thursday, January 15, 2026 - 6:00 PM
 Oakdale Middle School Room 230
 815 S. Oakdale Ave.
 Medford, OR 97501

AGENDA

1. Call to Order / Pledge of Allegiance / Roll Call	
2. Agenda Adjustments and Approval	
3. School Board Appreciation	3
4. Items for Information & Discussion	
a. Student Enrollment Forecast Update	4
b. Board Priority: Financial Stewardship	37
c. Medford Education Association (MEA) Report	44
5. Citizen Comments	
<i>a. School Board meetings are meetings of the School Board held in public, not meetings with the public. As a general rule, the Board will not engage in discussion with the public during this portion of the meeting. Please rest assured that all comments are carefully considered and will help guide future Board action. When your name is called, come forward to the table and state your name, if you reside in the district, and identify the organization, if any, that you represent. Keep your remarks brief and respect the three-minute time limit. Complaints about staff members cannot be discussed in open session and must be handled through a complaint procedure.</i>	
6. Recess	
7. Items for Information & Discussion (continued)	
a. Potential Partnership with United Soccer League (USL)	45
b. School Board Policy- first reading	46
8. Board Action Items	
a. Appoint Budget Committee Members	54
b. Budget Amendment #1-2025-26	62
c. 2026-27 School Year Calendar Approval	75
9. Consent Agenda	
a. Staff Assignment Report	78
b. Minutes from previous meeting	80
10. Announcements	
a. February 5 - Work Session at Oakdale Middle School - 5:45 PM	
b. Superintendent Search Process - Next Steps	87
11. Adjournment	

We welcome all attendees and are here to help accommodate requests for participation. Requests for interpretation, translation services, an interpreter for the hearing impaired, or other accommodations can be made in advance (48 hours) by emailing the [Superintendent's office](#) or by phone at 541-842-3621.



EXECUTIVE SUMMARY

Meeting Date:	January 15, 2026
Agenda Item:	School Board Appreciation
Item Type:	Recognition
Administrator:	Jeanne Grazioli, Marisa Poling
Objective:	Recognition of Medford School District Board of Directors for School Board Recognition Month

Background:

Tonight we celebrate:

Medford School District Board of Directors

January is School Board Appreciation Month, and Medford School District is proud to celebrate our MSD School Board Members! This month, and all year long, we are grateful for the countless volunteer hours you give in service to our schools, students, and community.

Thank you for your genuine care and interest in the students and families of Medford. Your commitment to keeping students at the center of every decision reflects the strong relationships that define MSD and are modeled at this leadership level. Your dedication and heart for kids makes a meaningful difference for a generation of learners.

As a small token of our appreciation, we are celebrating our Board at the Board meeting with gifts inspired by students.



EXECUTIVE SUMMARY

Meeting Date:	January 15, 2026
Agenda Item:	Student Enrollment Forecast Update
Item Type:	Information
Administrator:	Brad Earl
Objective:	Provide a report on the updated district demographic study.

Background: JOHNSON ECONOMICS was retained by the Medford School District (MSD) to develop a student enrollment forecast on the elementary, middle, and high school levels over the next 20 years. The forecast, which will serve to inform the District’s budgeting and facility planning, was developed by grade level and school. This report presents the forecast results as well as the methodology and assumptions used in the analysis.

The analysis was completed in December of 2025 and District staff will be on hand to review the information with the board.

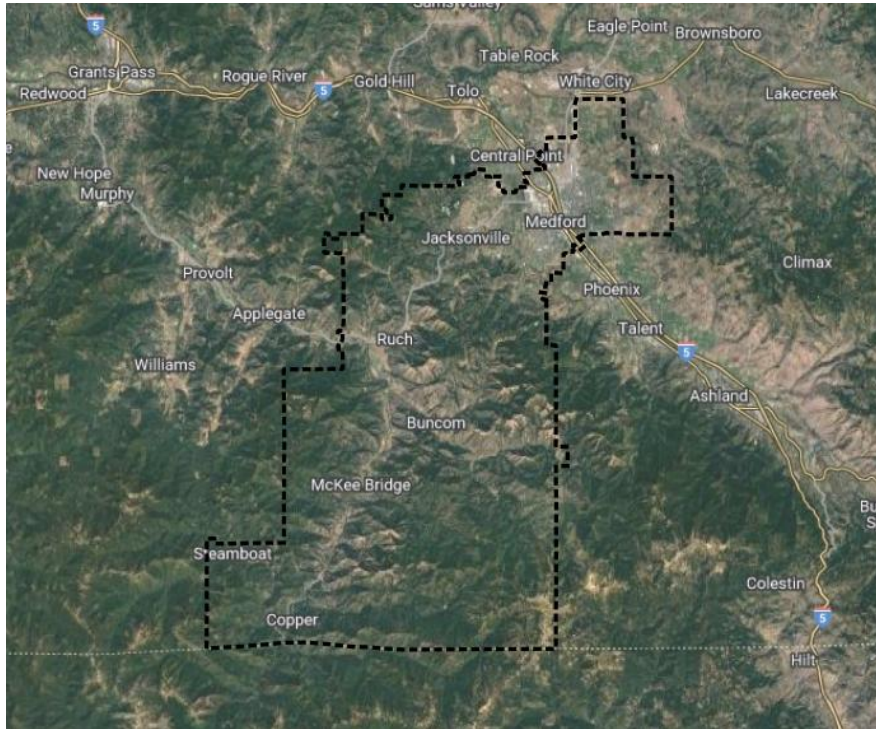
Additional Materials: [Student Enrollment Forecast 2026-2045 Medford School District](#)

Recommendation: Information only, no action required

Suggested Motion: No action required.



JOHNSON
ECONOMICS



STUDENT ENROLLMENT FORECAST

2026 - 2045

MEDFORD SCHOOL DISTRICT

PREPARED FOR
MEDFORD SCHOOL DISTRICT
DECEMBER 2025

JOHNSON ECONOMICS, LLC

621 SW Alder St, Suite 506
Portland, Oregon 97205



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I. INTRODUCTION

JOHNSON ECONOMICS was retained by the Medford School District (MSD) to develop a student enrollment forecast on the elementary, middle, and high school levels over the next 20 years. The forecast, which will serve to inform the District's facility planning, was developed by grade level and school. This report presents the forecast results as well as the methodology and assumptions used in the analysis.

This analysis follows previous forecasts developed by JOHNSON ECONOMICS for the MSD, most recently in early 2023. The 2023 analysis was conducted while the District was implementing changes to its schools and attendance areas, which impacted enrollment at middle and high schools. With the present update, there are a few years of enrollment data for the new schools and attendance areas that should improve the predictability of middle and high school enrollment over the next years.

This analysis makes use of a range of informative parameters, including historical enrollment data, demographic estimates, and geocoded housing and land data. The methodology produces a district-wide fall enrollment forecast by grade level for the 2026-2045 period. We then evaluate the current residential distribution of MSD students as well as future residential development prospects within the district's attendance areas in order to forecast enrollment at each school. Factors informing this "top down" allocation include recent enrollment trends, birth trends, kindergarten capture, grade progression, housing characteristics, development trends, and residential land capacity. The objective of this process is to determine likely geographic growth patterns and their impact on enrollment at each school.

This analysis follows a similar approach to the previous enrollment forecasts completed for the MSD, though we continue with a methodological change introduced in the 2023 analysis. Previous analyses had relied heavily on population estimates from the Census Bureau, which often had wide margins of error and suffered from data collection challenges in 2010 and 2020, in some cases yielding population estimates that were impossible to reconcile with other data sources – including school enrollment. In 2023, we therefore moved away from using census population estimates as the basis for enrollment forecasts.

As in 2023, we rely in this analysis largely on population estimates from the PSU Population Research Center (PRC), which has been contracted by the State of Oregon to produce official estimates and forecasts for counties and cities in the state, including for urban growth areas around each city. Prior to the 2023 analysis, the PRC made downward revisions to their long-term forecasts for the Medford area. These have since been revised again, with stronger population growth anticipated toward the end of the 20-year period. On the other hand, the propensity for public school enrollment has failed to bounce back from the COVID impact to the extent assumed in the 2023 analysis, while birth rates have continued to fall. The net result is somewhat lower enrollment forecasts in this updated analysis.

The 2023 study included an analysis of the number of students in new housing within the district, based on geocoded student addresses provided by the MSD overlaid with geocoded housing data. This data was used to develop student generation factors that can be applied to new housing in the district. We continue to use these factors in this update.

This report begins with background information on the MSD, before we discuss historical enrollment trends and key trends likely to impact future enrollment. We then outline our methodology and present projected enrollment by grade level and school. Detailed enrollment charts and tables are included at the end of the report.

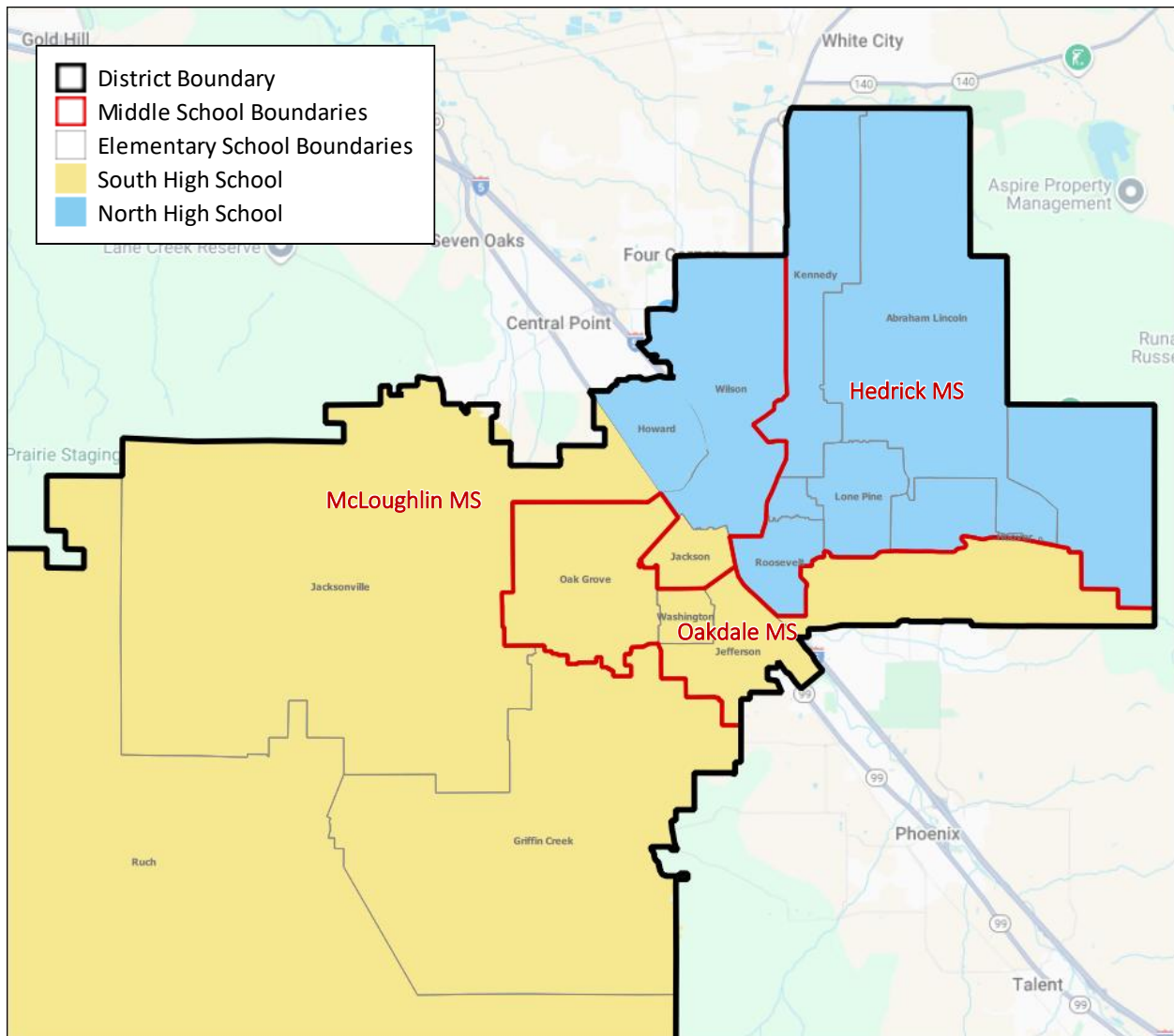


II. BACKGROUND

The MSD currently operates 13 elementary schools (K-5), 1 elementary/middle school (K-8), 1 online school (K-12), 3 middle schools (6-8), and 3 high schools (9-12). The high school level has two standard schools with their own North/South attendance areas, plus the Innovation Academy, which replaced Central High in 2023 as an option for students from the entire district, either as a sole or concurrent enrollment option. In the same year, the South attendance area was expanded at the expense of the North area.

On the middle school level, Oakdale was added as a third school with its own attendance area in 2023, reducing the Hedrick and McLoughlin attendance areas. This resulted in middle school boundaries that do not perfectly align with elementary or high school boundaries. In addition to these changes, there have also been changes to the grades offered at some of the schools that affect enrollment trends to some extent.

FIGURE 2.1: ATTENDANCE AREAS



SOURCE: Medford School District, Google Maps, JOHNSON ECONOMICS

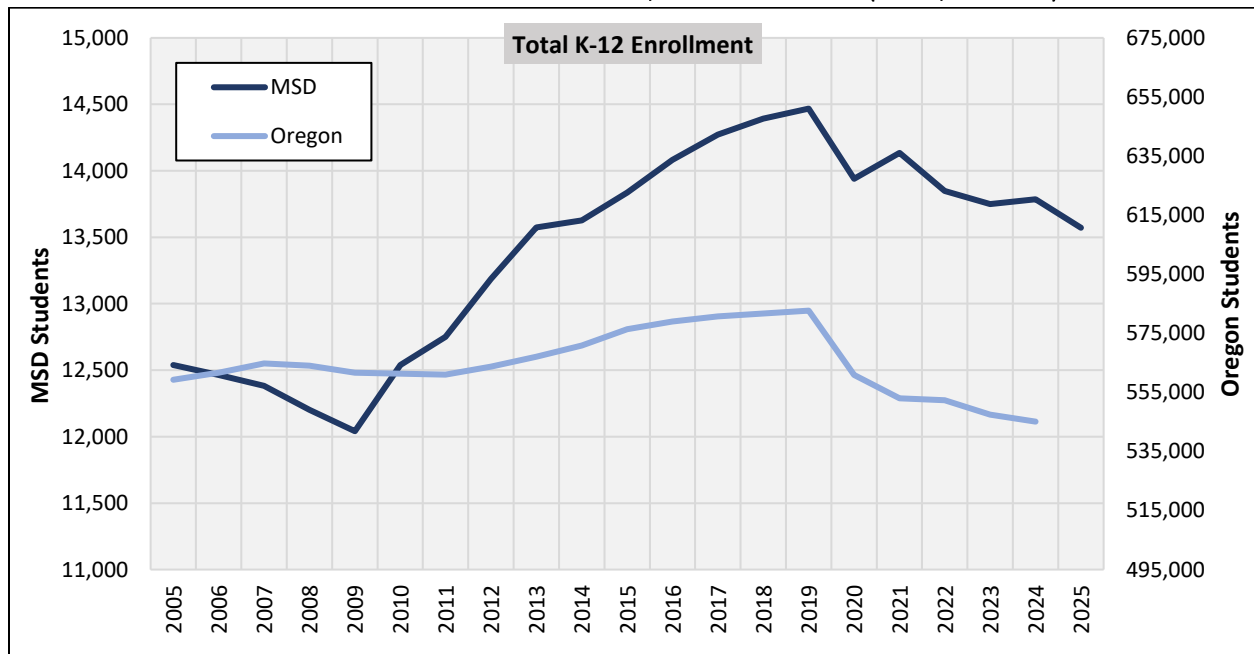


III. HISTORICAL ENROLLMENT TRENDS

TOTAL K-12 ENROLLMENT

The Medford School District experienced strong enrollment growth during the last decade, reflecting a combination of strong in-migration and high birth rates during the 2000s (Gen Z). Between 2009 and 2019, the district added more than 2,400 students on the net. COVID-19 caused a steep decline in the fall of 2020, followed by a partial recovery in 2021. Declines have continued since 2021, reflecting that large senior classes (pre-2008 births) have graduated while small Kindergarten cohorts have entered. Increasing use of homeschooling and private schools has also contributed. As of fall 2025, the MSD had 13,572 students – a decline of 900 students from the 2019 peak. The trends in the MSD have largely followed the statewide trajectory over the past 10 years, but with stronger growth during the 2010s.

FIGURE 3.1: HISTORICAL FALL ENROLLMENT, MSD AND OREGON (OCT 1, 2005-25)



HISTORICAL ENROLLMENT																		
Grade	2005	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2005-2015		2015-2025		2005-2025	
													Δ	AAGR	Δ	AAGR	Δ	AAGR
K	923	1,099	1,110	1,123	1,146	1,117	890	1,054	937	957	956	944	176	1.8%	-155	-1.5%	21	0.1%
1	941	1,131	1,154	1,121	1,143	1,152	1,036	994	1,096	983	1,032	960	190	1.9%	-171	-1.6%	19	0.1%
2	904	1,133	1,160	1,145	1,169	1,137	1,068	1,082	985	1,121	1,002	1,065	229	2.3%	-68	-0.6%	161	0.8%
3	906	1,145	1,153	1,186	1,150	1,176	1,059	1,086	1,102	1,018	1,148	996	239	2.4%	-149	-1.4%	90	0.5%
4	978	1,055	1,161	1,181	1,181	1,166	1,126	1,090	1,104	1,111	1,029	1,141	77	0.8%	86	0.8%	163	0.8%
5	955	1,083	1,095	1,157	1,194	1,175	1,115	1,130	1,074	1,090	1,101	1,043	128	1.3%	-40	-0.4%	88	0.4%
6	947	1,085	1,104	1,087	1,195	1,194	1,129	1,122	1,097	1,081	1,064	1,067	138	1.4%	-18	-0.2%	120	0.6%
7	908	980	1,094	1,092	1,090	1,168	1,173	1,149	1,081	1,065	1,077	1,041	72	0.8%	61	0.6%	133	0.7%
8	969	1,009	981	1,089	1,065	1,081	1,166	1,155	1,123	1,084	1,066	1,060	40	0.4%	51	0.5%	91	0.4%
9	1,069	988	1,020	1,013	1,096	1,057	1,056	1,131	1,106	1,099	1,091	1,086	-81	-0.8%	98	1.0%	17	0.1%
10	1,090	1,099	973	1,004	984	1,089	1,033	1,075	1,119	1,084	1,086	1,088	9	0.1%	-11	-0.1%	-2	0.0%
11	942	965	1,069	977	975	953	1,066	997	1,033	1,072	1,067	1,070	23	0.2%	105	1.0%	128	0.6%
12	1,006	1,064	1,007	1,096	1,004	1,003	1,023	1,070	992	985	1,067	1,011	58	0.6%	-53	-0.5%	5	0.0%
Total	12,538	13,836	14,081	14,271	14,392	14,468	13,940	14,135	13,849	13,750	13,786	13,572	1,298	1.0%	-264	-0.2%	1,034	0.4%
<i>K-5</i>	<i>5,607</i>	<i>6,646</i>	<i>6,833</i>	<i>6,913</i>	<i>6,983</i>	<i>6,923</i>	<i>6,294</i>	<i>6,436</i>	<i>6,298</i>	<i>6,280</i>	<i>6,268</i>	<i>6,149</i>	<i>1,039</i>	<i>1.7%</i>	<i>-497</i>	<i>-0.8%</i>	<i>542</i>	<i>0.5%</i>
<i>6-8</i>	<i>2,824</i>	<i>3,074</i>	<i>3,179</i>	<i>3,268</i>	<i>3,350</i>	<i>3,443</i>	<i>3,468</i>	<i>3,426</i>	<i>3,301</i>	<i>3,230</i>	<i>3,207</i>	<i>3,168</i>	<i>250</i>	<i>0.9%</i>	<i>94</i>	<i>0.3%</i>	<i>344</i>	<i>0.6%</i>
<i>9-12</i>	<i>4,107</i>	<i>4,116</i>	<i>4,069</i>	<i>4,090</i>	<i>4,059</i>	<i>4,102</i>	<i>4,178</i>	<i>4,273</i>	<i>4,250</i>	<i>4,240</i>	<i>4,311</i>	<i>4,255</i>	<i>9</i>	<i>0.0%</i>	<i>139</i>	<i>0.3%</i>	<i>148</i>	<i>0.2%</i>

SOURCE: Oregon Department of Education, Medford School District (2025), JOHNSON ECONOMICS



One of the tools used in enrollment forecasting is grade progression ratios (GPRs), which is the ratio between students in a grade relative to the number of students in the grade below in the prior year. A GPR of 1.00 indicates stable progression, where the number of students moving out of the district, dropping out, or attending private or home school is equal to the number of new students. GPRs tend to grow in years of strong economic growth and immigration, and decline during contractions. We see this also in the MSD, where recent GPRs have been significantly lower than in the mid-2010s. The District has an average GPR of 1.00 over the past 10 years.

FIGURE 3.2: HISTORICAL GRADE PROGRESSION RATIOS, MSD (2013-22)

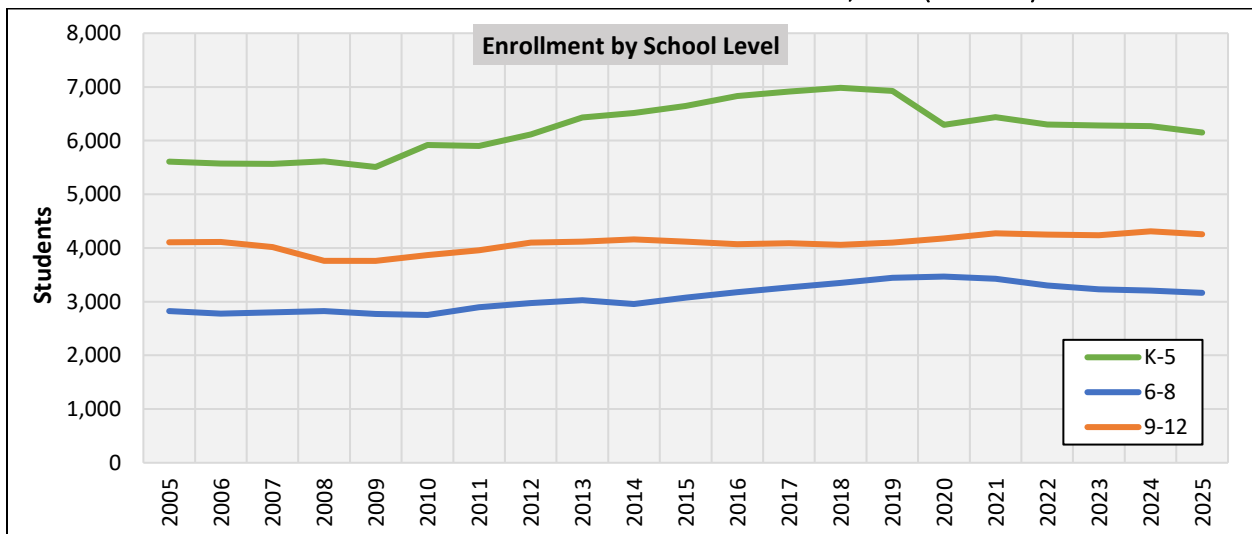
HISTORICAL GRADE PROGRESSION RATIOS												
Grade	'15-'16	'16-'17	'17-'18	'18-'19	'19-'20	'20-'21	'21-'22	'22-'23	'23-'24	'24-'25	3-Year Average	10-Year Average
1	1.05	1.01	1.02	1.01	0.93	1.12	1.04	1.05	1.08	1.00	1.04	1.03
2	1.03	0.99	1.04	0.99	0.93	1.04	0.99	1.02	1.02	1.03	1.02	1.01
3	1.02	1.02	1.00	1.01	0.93	1.02	1.02	1.03	1.02	0.99	1.02	1.01
4	1.01	1.02	1.00	1.01	0.96	1.03	1.02	1.01	1.01	0.99	1.00	1.01
5	1.04	1.00	1.01	0.99	0.96	1.00	0.99	0.99	0.99	1.01	1.00	1.00
6	1.02	0.99	1.03	1.00	0.96	1.01	0.97	1.01	0.98	0.97	0.98	0.99
7	1.01	0.99	1.00	0.98	0.98	1.02	0.96	0.97	1.00	0.98	0.98	0.99
8	1.00	1.00	0.98	0.99	1.00	0.98	0.98	1.00	1.00	0.98	1.00	0.99
9	1.01	1.03	1.01	0.99	0.98	0.97	0.96	0.98	1.01	1.02	1.00	1.00
10	0.98	0.98	0.97	0.99	0.98	1.02	0.99	0.98	0.99	1.00	0.99	0.99
11	0.97	1.00	0.97	0.97	0.98	0.97	0.96	0.96	0.98	0.99	0.98	0.97
12	1.04	1.03	1.03	1.03	1.07	1.00	0.99	0.95	1.00	0.95	0.97	1.01
Average	1.02	1.01	1.00	1.00	0.97	1.01	0.99	1.00	1.01	0.99	1.00	1.00

SOURCE: Oregon Department of Education, Medford School District (2025), JOHNSON ECONOMICS

ENROLLMENT BY SCHOOL LEVEL

The elementary level saw the strongest increase over the last decade, but also the steepest declines in the most recent years. This reflects declining birth rates in the wake of the 2008-09 recession and greater shifts to homeschool/private school among the youngest students in recent years. The decline in birth rates after 2007 began to affect middle school enrollment in 2021, and the student count has declined since. High school enrollment has increased in recent years as these large Gen Z classes have passed through, but declined in 2025 as the crest of the Gen Z wave graduated in the spring.

FIGURE 3.3: HISTORICAL FALL ENROLLMENT BY SCHOOL LEVEL, MSD (2005-25)



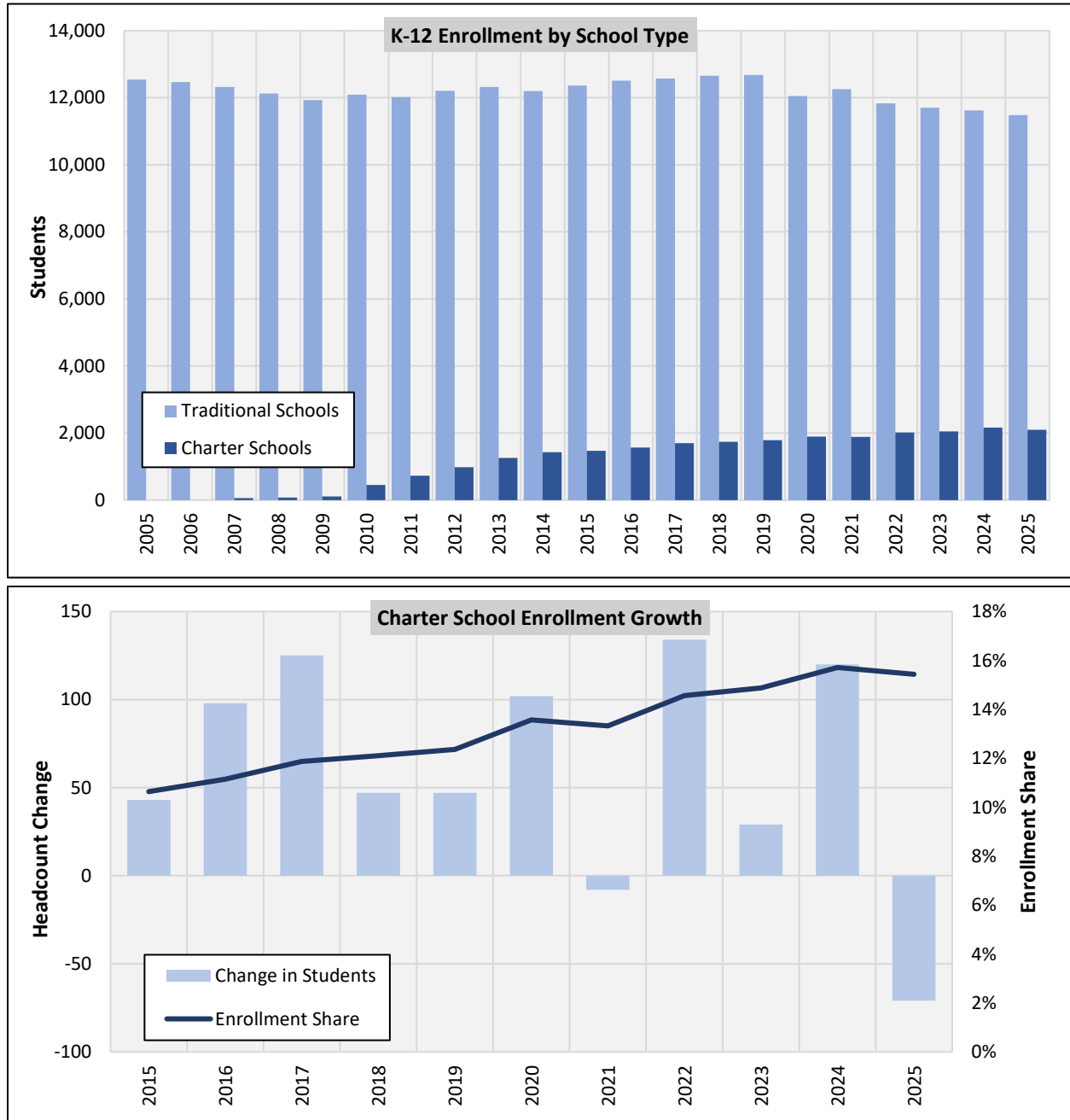
SOURCE: Oregon Department of Education, Medford School District (2025), JOHNSON ECONOMICS



ENROLLMENT BY SCHOOL TYPE

Public charter schools accounted for most of the enrollment growth over the past 15 years, at the expense of traditional schools. Since the introduction of these schools in 2007, total K-12 enrollment in charter schools has grown to 2,095 as of fall 2025, representing 15.4% of total enrollment. The peak was in fall 2024, with enrollment of 2,166 and a share of 15.7%. The decline of 71 students in fall 2025 was concentrated in the lower grades at Kids Unlimited and Logos.

FIGURE 3.4: HISTORICAL FALL ENROLLMENT BY SCHOOL TYPE, MSD (2005-25)



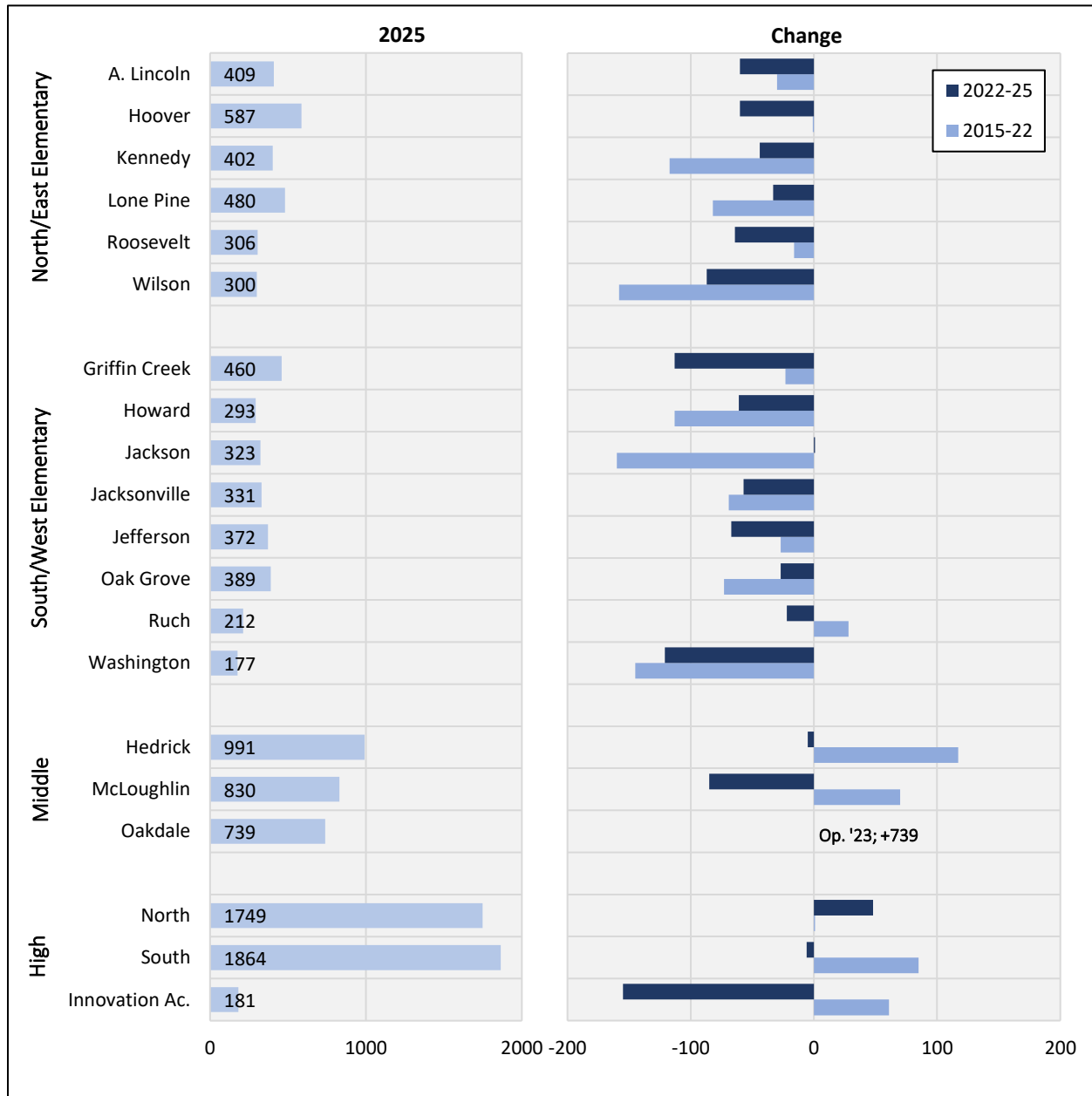
SOURCE: Oregon Department of Education, Medford School District (2025), JOHNSON ECONOMICS



ENROLLMENT BY SCHOOL

On the elementary level, south/west schools have generally lost more enrollment than north/east schools in recent years, with Washington and Griffin Creek seeing the steepest declines. All elementary schools except Jackson have lost enrollment over the past three years. On the middle school level, the introduction of Oakdale in fall 2023 resulted in declines at the other two schools, especially at McLoughlin. On the high school level, North has gained students over the past three years, while South has seen a small decline. The Innovation Academy (form. Central High) added students in 2024-25 but saw a decline of 146 students in fall 2025.

FIGURE 3.5: ENROLLMENT BY SCHOOL*, MSD



* Ruch includes Ruch Outdoor Community School. Innovation Academy is formerly Central High.

SOURCE: Oregon Department of Education, JOHNSON ECONOMICS



IV. POPULATION AND HOUSING TRENDS

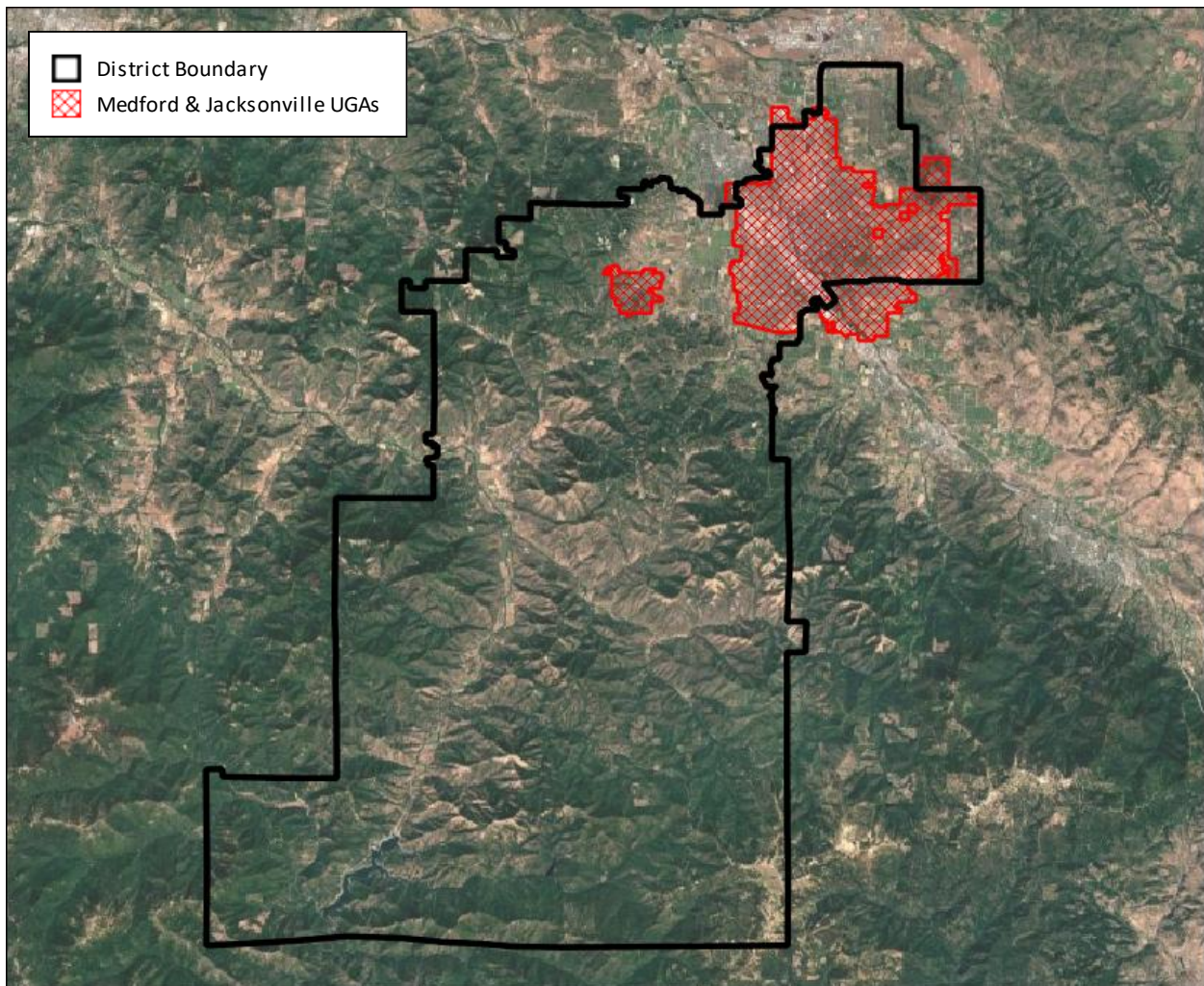
POPULATION GROWTH

DATA AND METHODOLOGY

As explained in the introduction, we rely on official population estimates from the PSU Population Research Center (PRC) in this analysis. The PRC does not produce estimates for school districts, but provides estimates for urban growth areas (UGAs) around cities, which can be used as basis for district estimates. The combined UGAs of Medford and Jacksonville cover most of the housing within the MSD, and most of the new growth takes place within these areas. The rural population outside these areas is relatively stable, as rural homebuilding is limited and less cyclical than in urban areas. The PRC recently revised down earlier population estimates for the Medford and Jacksonville UGAs.

The following map shows district boundaries and the urban growth areas of Medford and Jacksonville. Parts of the Medford UGA fall outside the MSD, while the MSD includes rural areas outside the UGAs. When estimating the population in the MSD, we use county housing data in order to add and subtract growth in these areas. With this approach, we estimate the 2025 population in the MSD to be 99,500, compared to 96,100 in the combined UGAs.

FIGURE 4.1: MSD BOUNDARY VS. MEDFORD & JACKSONVILLE UGAS



SOURCE: Jackson County, Google Earth, JOHNSON ECONOMICS

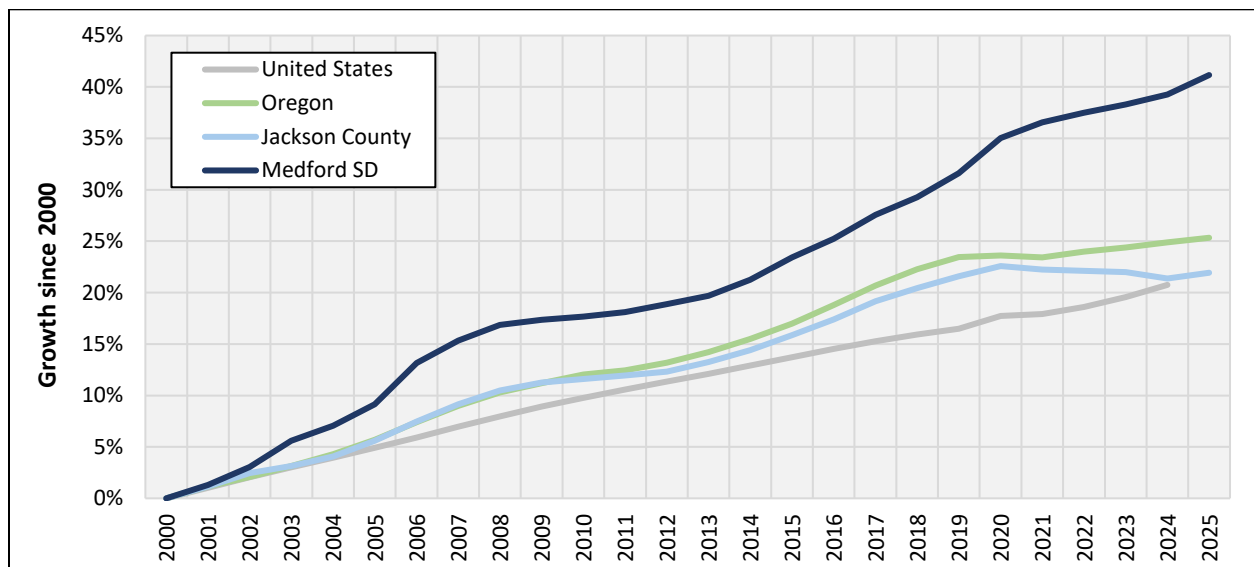
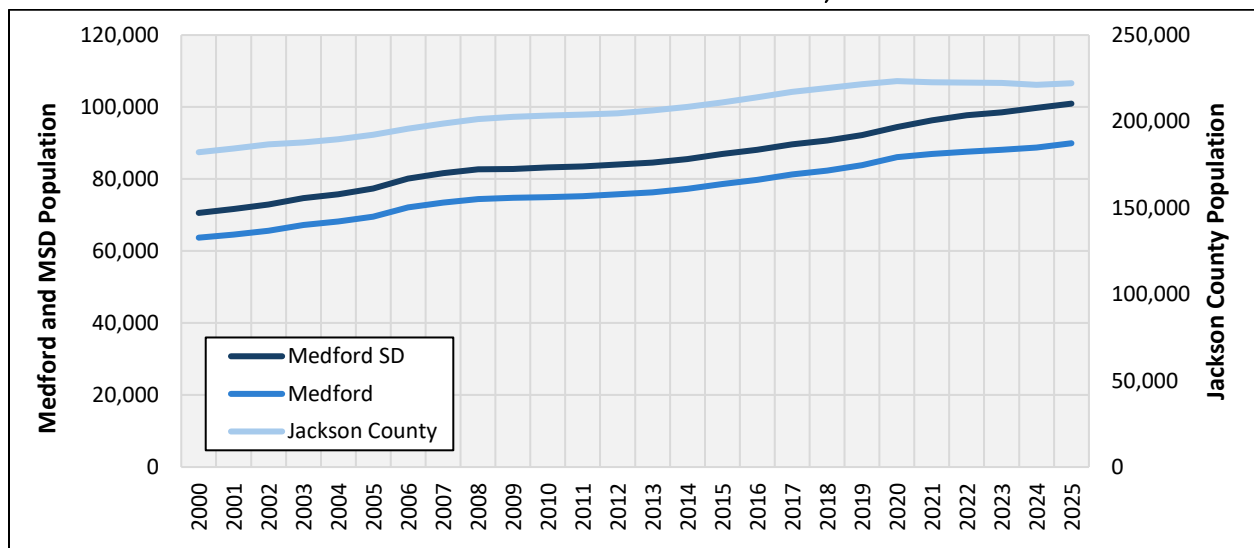


MSD POPULATION GROWTH

Based on changes in the housing inventory within the MSD and the UGAs, we estimate that the MSD population has grown by 23,700 people over the past 20 years. This represents an average annual growth rate of 1.3%, which compares to 1.3% in the Medford-Jacksonville UGAs, 0.8% in Jackson County, 0.9% in Oregon, and 0.8% nationwide. The growth was strongest in the mid-2000s and during COVID. The latter caused increased in-migration and a return of college students.

The growth has slowed since 2020, reflecting weaker job growth and in-migration – with high mortgage rates reducing mobility. However, the MSD has still added 6,500 residents since 2020, including 3,900 within the City of Medford. The PRC’s estimates for Jackson County indicate a population decline since 2020, something that appears to contradict changes to housing supply and occupancy over these years. We therefore question these estimates, and expect future upward revisions.

FIGURE 4.2: POPULATION AND POPULATION GROWTH SINCE 2000, GEOGRAPHIC COMPARISON



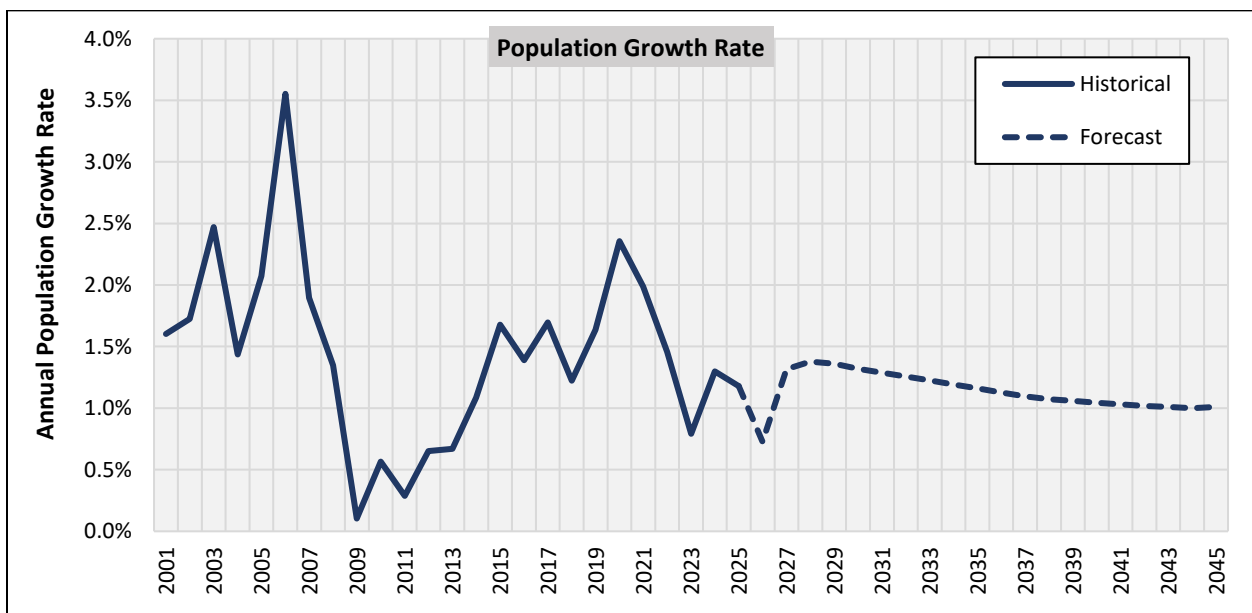
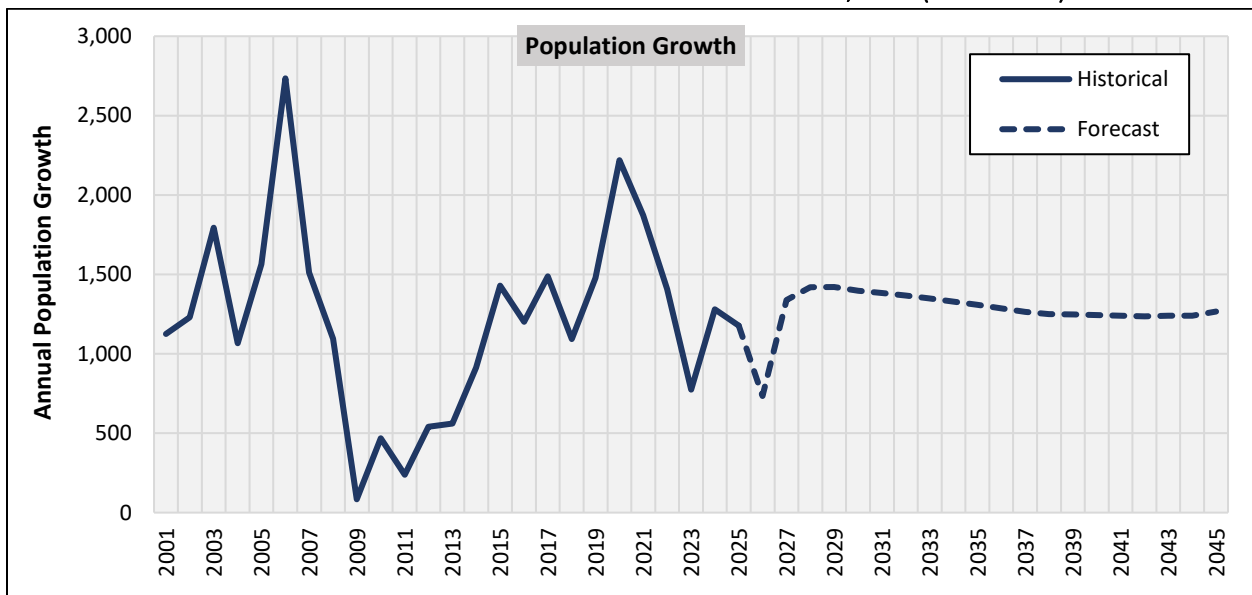
SOURCE: PSU Population Research Center, JOHNSON ECONOMICS



Over the next 20 years, the PRC projects a gradual decline in the growth rate, from 1.5% to 1.0% per year, for the combined UGAs. The deceleration is in part a function of broader demographic trends, reflecting that the large baby boomer cohort is leaving the population while relatively few new children are born. However, it also reflects an expected slowdown in in-migration on the local level, which in the past has been driven by baby boomers from California. Note that the PRC recently raised the forecast, after previously assuming a deceleration toward 0.6% annual growth by 2045. However, the PRC forecast does not take into account the last two years of data.

When developing a forecast for the MSD, we have reduced PRC's near-term growth rates somewhat to reflect recent growth, and manually lowered the 2026 estimate to reflect recent building permits. This results in growth around 700 in 2026, increasing to 1,400 in 2028, thereafter slowing toward 1,200 per year.

FIGURE 4.3: HISTORICAL AND PROJECTED POPULATION GROWTH, MSD (2001-2042)



SOURCE: PSU Population Research Center, JOHNSON ECONOMICS

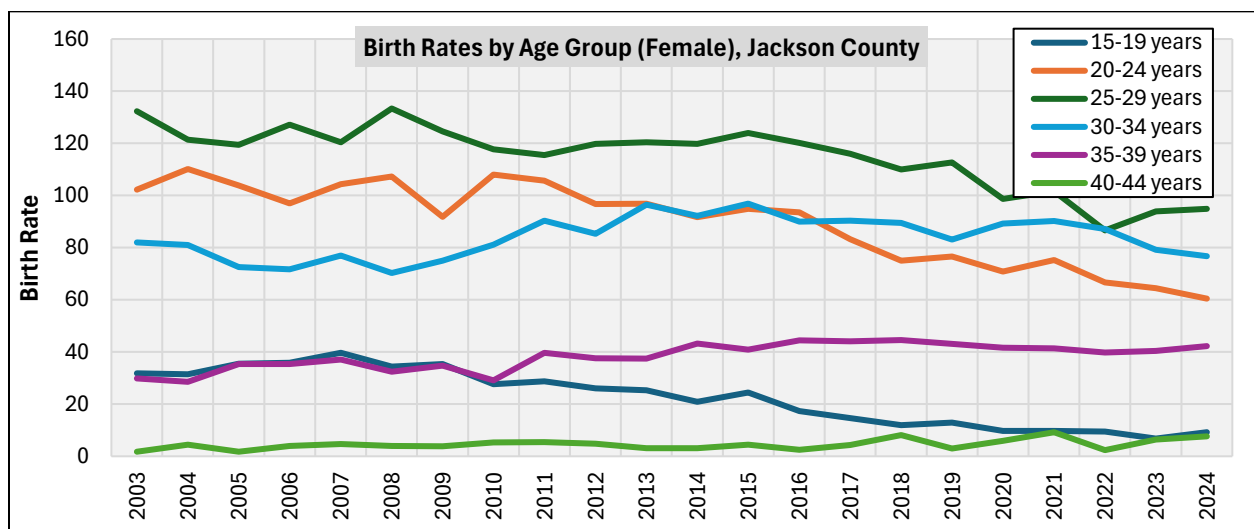
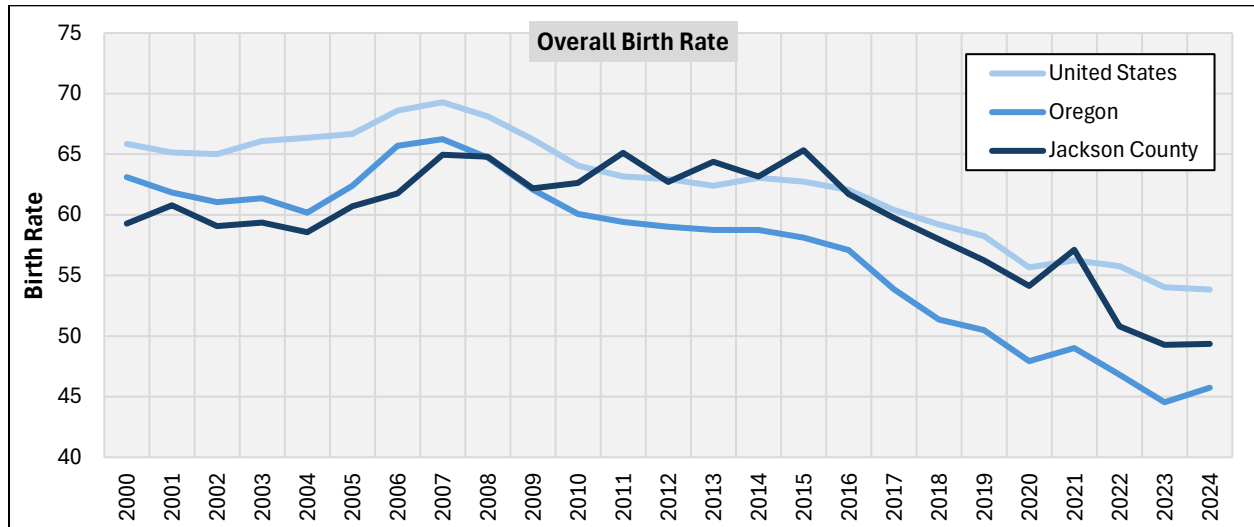


BIRTH TRENDS

Births are of particular interest due to the impact on future Kindergarten enrollment. Births have been declining nationwide since 2007, when the foreclosure crisis hit. Easy access to financing had enabled many young households – include single-income households with moderate wages – to move into family-friendly single-family homes. This contributed to an increase in births until 2007. The following recession resulted in an overhaul of credit requirements, and relegated a majority of young households to the rental market. The threshold to the ownership market has only increased since then, due to a combination of rapidly rising home prices, increasing levels of student debt, and the difficulty in saving for downpayments as rents have taken increasing shares of household budgets. As a result, young couples wait longer before they have children, or they decide not to have children at all.

Jackson County has largely followed the national trend, though its birth count peaked in 2008 rather than 2007. Moreover, the county saw smaller declines in its birth rates, at least until 2015. After 2015, the birth rates have fallen more than on the national level, especially among mothers above 30, which have represented much of the population growth over this period due to the large millennial cohort.

FIGURE 4.4: BIRTH RATES (2000-24)



SOURCE: CDC, PSU PRC, JOHNSON ECONOMICS



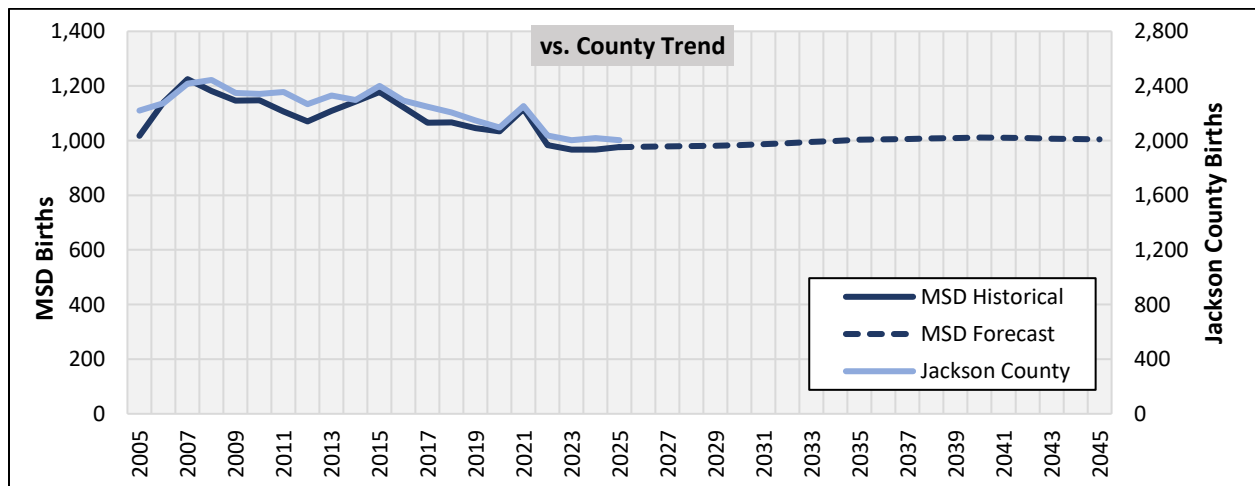
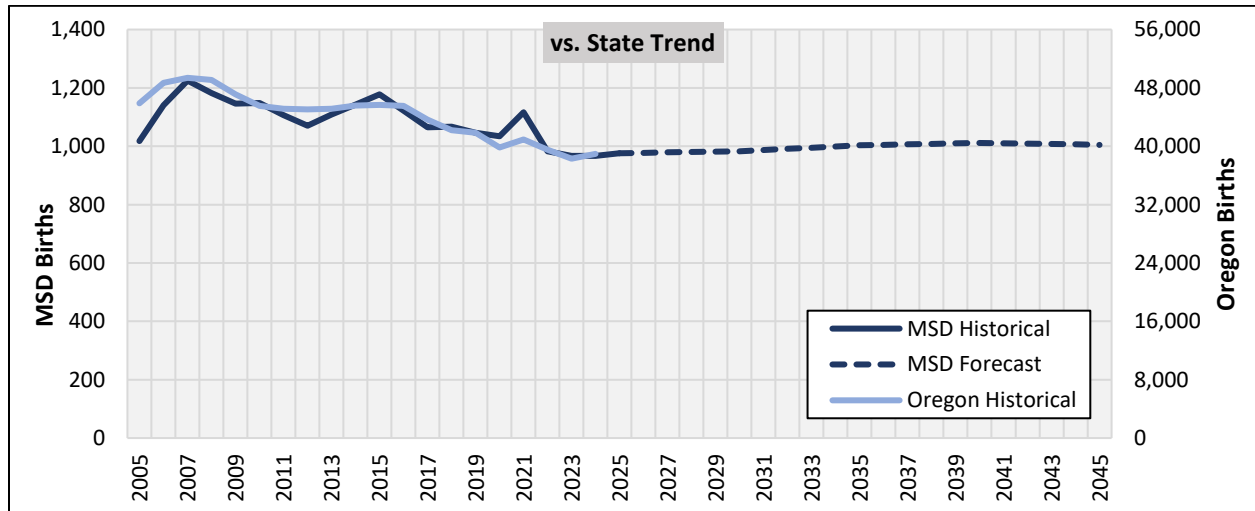
MSD BIRTHS

Data on births to mothers residing in the MSD are provided through custom datasets from the Oregon Health Authority, while county and state data is publicly available.

The birth trend in the MSD has closely tracked the county and state trends in recent years. The birth count was 1,225 in 2007, and thereafter fell to 1,070 by 2012, before partly recovering to 1,178 in 2015. The birth count fell over the following years, except for a temporary spike in 2021, caused by some families moving planned births forward as COVID-19 shifted the focus to homebound life. The birth count has been relatively stable since 2022, hovering just under 1,000 in the MSD and just over 2,000 in the county. Preliminary data from 2025 (through August) indicates a continuation of this stable trend.

The stabilization in births in recent years is in line with our expectations based on the female age distribution and trended birth rates within each age group. Due to the large cohort born in the mid-2000s reaching prime fertility age in the coming years, the number of births is expected to increase slightly over the forecast period, with births at older age groups offsetting declines at lower ages. Though birth rates are assumed to continue to decline, the declines are anticipated to slow, and the population increase at the family stage should result in more births overall.

FIGURE 4.5: HISTORICAL AND PROJECTED BIRTH COUNTS, MSD AND OREGON (2005-2042)



SOURCE: Oregon Health Authority, CDC, JOHNSON ECONOMICS

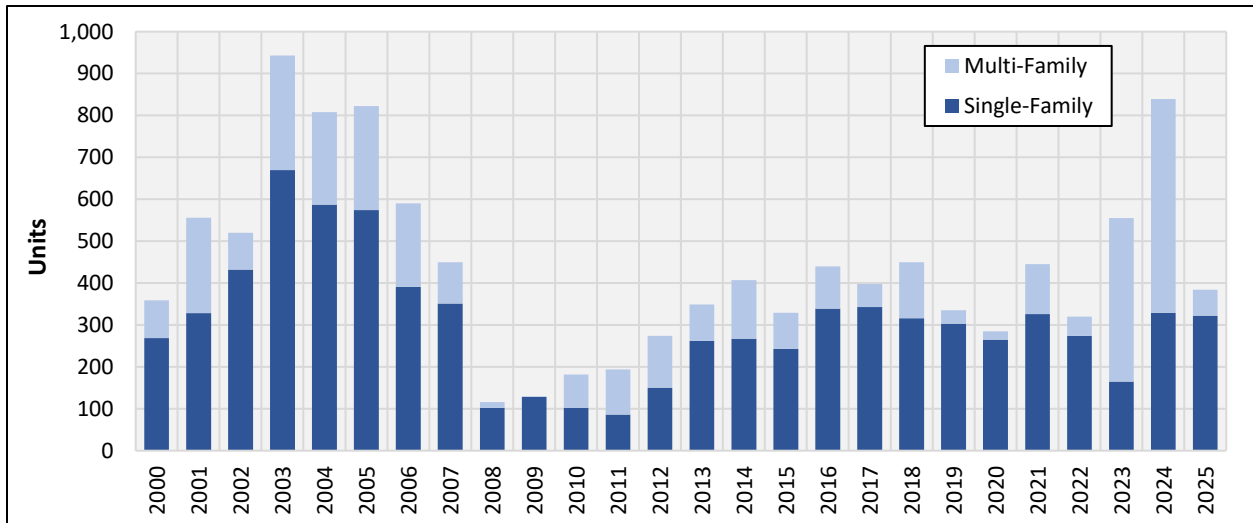


HOUSING CONSTRUCTION

CONSTRUCTION TRENDS

The number of single-family building permits issued in Medford and Jacksonville have been relatively stable in recent years, hovering around 300 per year. However, multifamily permits have fluctuated, resulting in total annual permits ranging from 300 to more than 800. Rural homebuilding in the MSD has averaged around 20 homes per year.

FIGURE 4.6: ISSUED RESIDENTIAL BUILDING PERMITS, MEDFORD AND JACKSONVILLE (2000-22)

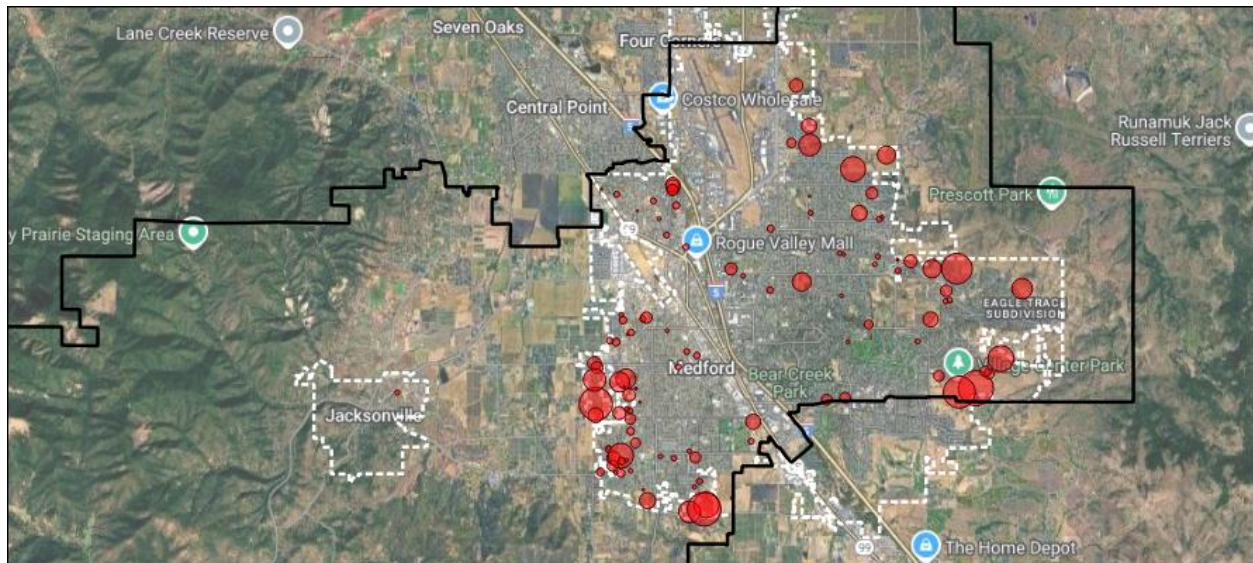


SOURCE: U.S. Census Bureau/HUD, JOHNSON ECONOMICS

DEVELOPMENT TRENDS

After record high multifamily development in 2023 and 2024, weaker demand and high financing costs have greatly reduced development activity in this segment recently. Few projects are proposed in the MSD, and single-family housing is likely to dominate in coming years. The following map shows all proposed residential projects in the MSD.

FIGURE 4.7: PROPOSED RESIDENTIAL DEVELOPMENT, MEDFORD AND JACKSONVILLE



SOURCE: City of Medford, City of Jacksonville, JOHNSON ECONOMICS

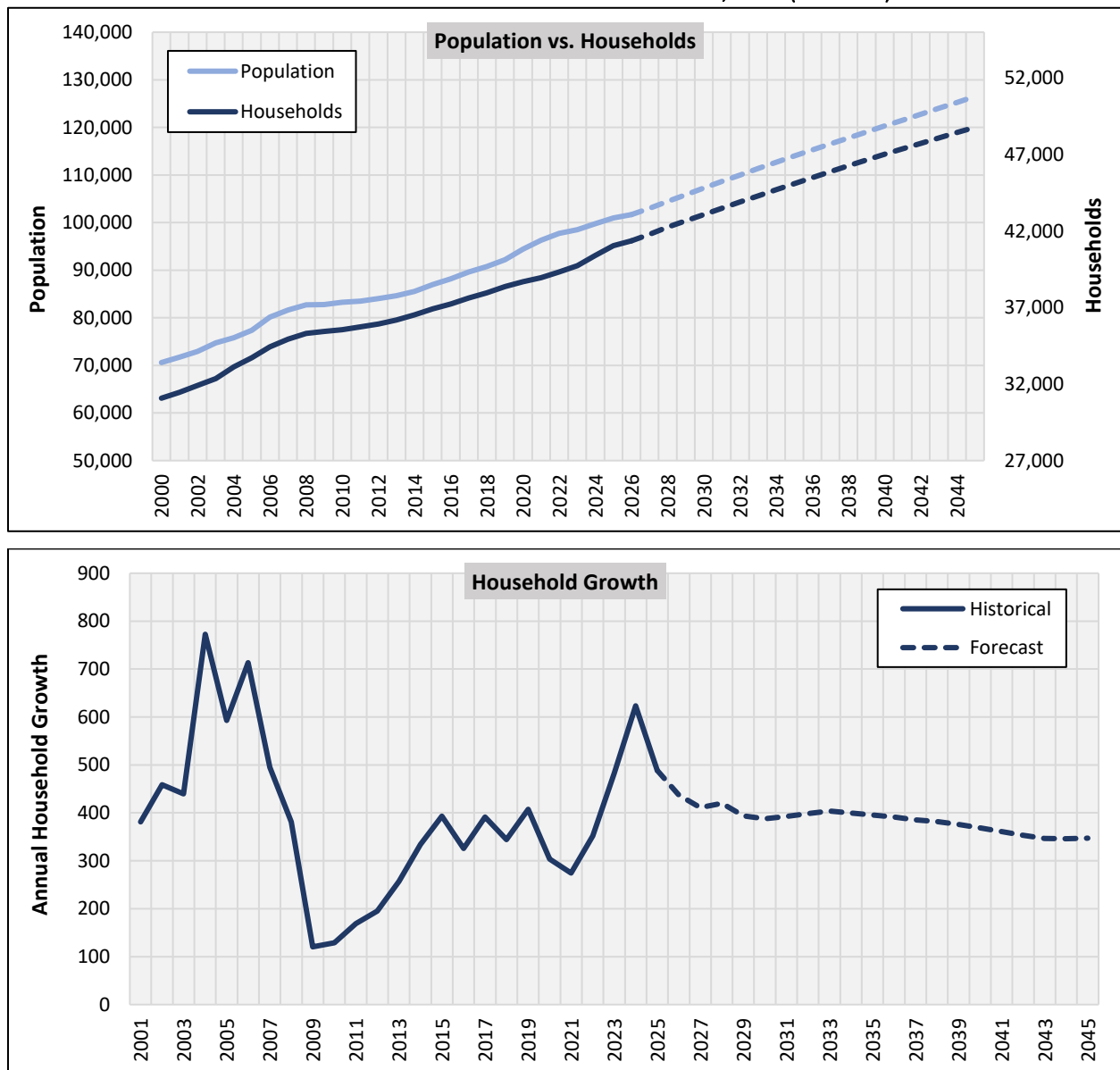


HOUSEHOLD GROWTH

We project near-term household growth in the MSD based on anticipated completed housing units. Household growth beyond the near term is estimated on the basis of the population forecast derived from PRC projections, taking into account historical population per household by age group. Our estimates are shifted to match the school year.

Estimated annual household growth is displayed in the second chart below. The growth is expected to remain relatively stable over the first 10 years at around 400 units per year. The growth is thereafter modeled to decelerate toward 350 units per year. Based on recent trends, we assume that 25% of household growth will flow to multifamily units. Note that we distinguish between single- and multifamily units when we estimate the enrollment impact, as single-family units generally have a higher incidence of students.

FIGURE 4.8: POPULATION AND HOUSEHOLD GROWTH, MSD (2000-45)



SOURCE: JOHNSON ECONOMICS



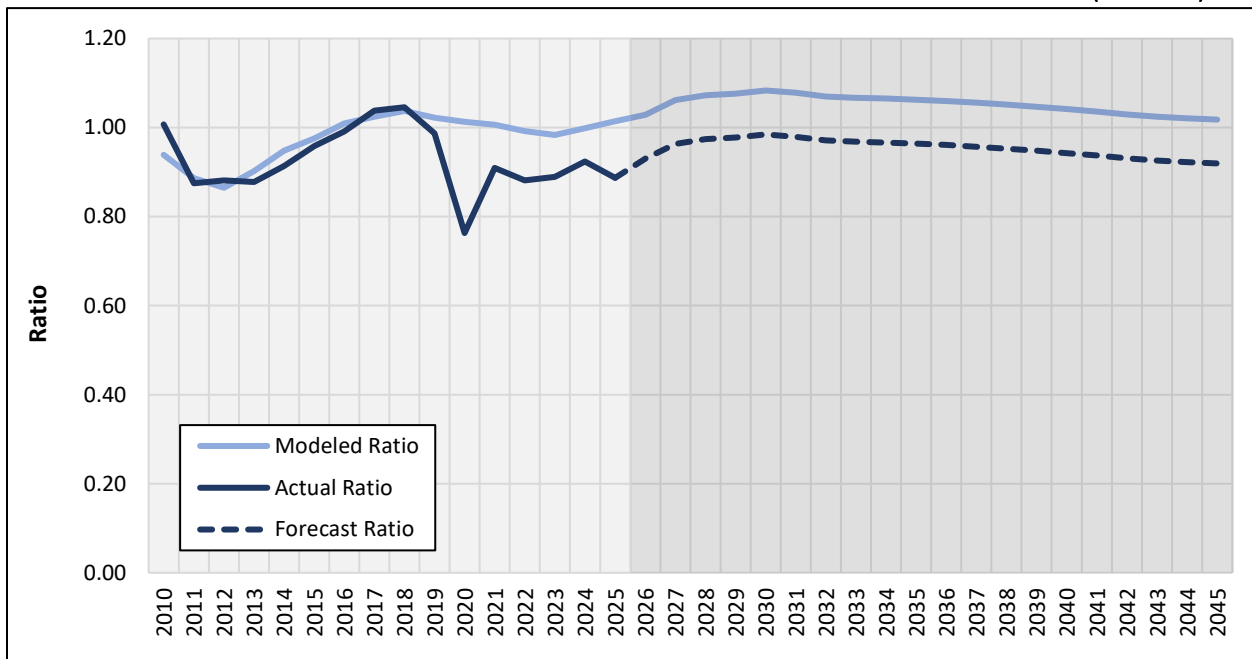
V. DISTRICT-WIDE ENROLLMENT FORECAST

METHODOLOGY

KINDERGARTEN CAPTURE

Our modeling of future enrollment on the district level incorporates several independent analyses. First, we analyze the historical relationship between births in the district and kindergarten enrollment five years later. This analysis takes into account the rate of household growth, which affects the number of children moving into the district between birth and kindergarten. Due to a moderation in prior-five-year household growth, a decline was expected in recent years in the ratio between kindergarten enrollment and births five years prior. However, COVID and the other factors that shifted enrollment to private schools and homeschool amplified these declines. The ratio has stabilized at around 90% over the past three years. In our forecast, we assume that this differential between the modeled ratio (pre-2020 household-growth-adjusted ratio) and the actual ratio will continue at this level over the next 20 years.

FIGURE 5.1: HISTORICAL AND PROJECTED RATIO BETWEEN BIRTHS AND K ENROLLMENT 5 YEARS LATER (2010-45)



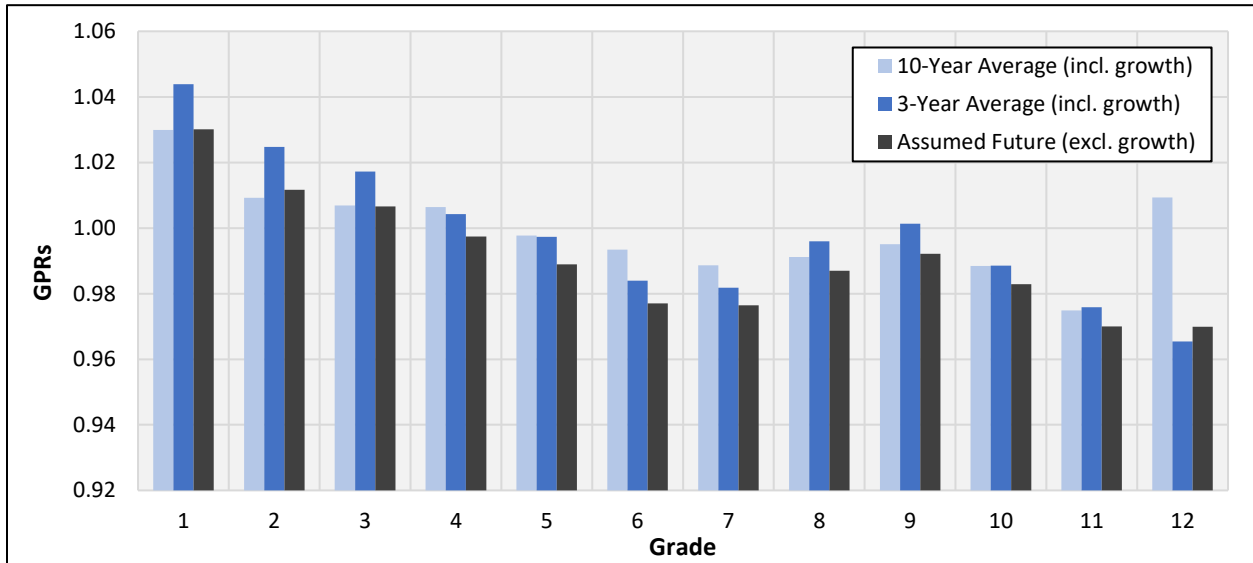
SOURCE: Oregon Department of Education, Oregon Health Authority, JOHNSON ECONOMICS

GRADE PROGRESSION

The second main component of our district-wide enrollment forecast is the enrollment progression within the existing household base in the MSD. As the basis for this component, we use the average grade progression ratios (GPRs) over the past 3 and 10 years, as presented in Section III. Thus, we limit the distortions of COVID-19, which resulted in initial GPR declines in the fall of 2020, followed by gains in the fall of 2021. As historical GPRs reflect in-migration and household growth, we use growth-adjusted averages (see next page), which are estimated by subtracting enrollment attributable to household growth (see next component). Note that grade 12 had high GPRs pre-COVID, averaging 1.04 over the 2015-20 period, followed by an average of 0.97 post-COVID (2021-25).



FIGURE 5.2: ASSUMED FUTURE GRADE PROGRESSION RATIOS

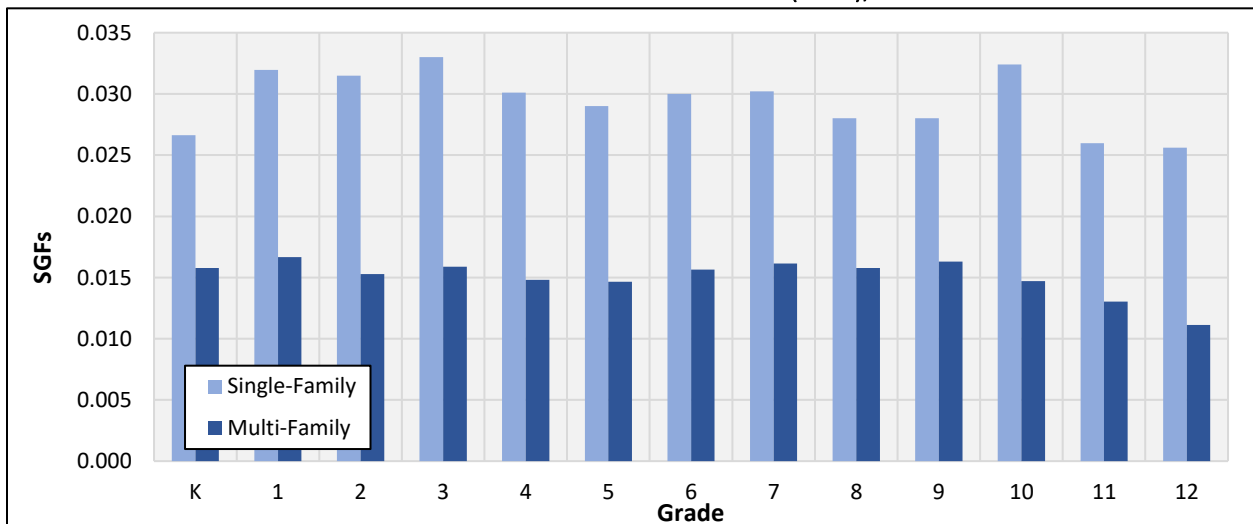


SOURCE: Oregon Department of Education, JOHNSON ECONOMICS

HOUSEHOLD GROWTH

While the kindergarten enrollment forecast incorporates the impact of future household growth, the growth-adjusted GPRs applied to grade 1-12 enrollment do not. In order to account for household growth over the period, we apply grade 1-12 student generation factors (SGFs) to the projected household growth in the district. The SGFs are derived from a 2023 geographic analysis of the type of housing MSD students live in, relying on geocoded student addresses and geocoded housing data from the county assessor. The SGRs represent the ratios between the number of students residing in recently constructed homes (built last 10 years) and the total number of recently constructed homes. SGRs are calculated for each grade, and separately for single- and multi-family homes, due to the higher frequency of students in single-family homes. For instance, for every new single-family home built in the MSD, we expect 0.032 first-grade students, while we expect 0.017 first-grade students for every new multi-family home.

FIGURE 5.3: STUDENT GENERATION FACTORS (SGFs), 2023



SOURCE: JOHNSON ECONOMICS



DISTRICT FORECAST

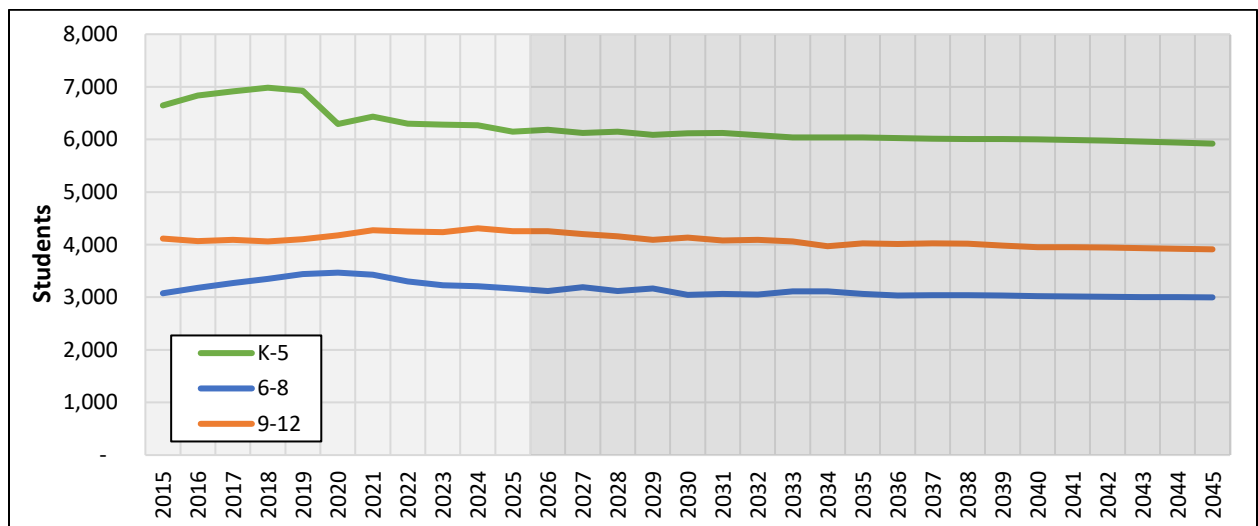
TOTAL DISTRICT FORECAST

The outlined methodology results in the following enrollment forecast for the MSD over the next 20 years. In the first few years, we expect a slight decline in elementary school enrollment, reflecting that the falling birth rates over the past decade will result in smaller cohorts replacing graduating classes. However, the birth increase in 2021 is expected to lift the enrollment by 2026, with additional growth expected toward the end of the decade, followed by declines. At the middle school level, we expect moderate growth in the first five years, followed by similar declines in the subsequent five years. High schools are anticipated to see a marked increase in the fall of 2023, due to a small senior class of 2022 and a large rising freshman class. Nearly flat enrollment growth is anticipated in the following years.

For the next 10 years as a whole, we expect a decline of around 400 students in total, with around 100 each at the elementary and middle school level, and 200 at the high school level. In the following 10-year period, we expect a decline of another 300 students, close to equally distributed across the three levels.

FIGURE 5.4: ENROLLMENT FORECAST, TOTAL DISTRICT ENROLLMENT, MSD (2025-2045)

MSD DISTRICT FORECAST																
Grade	ACTUAL ENROLLMENT						FORECAST ENROLLMENT				2025-2035		2035-2045		2025-2045	
	2020	2021	2022	2023	2024	2025	2030	2035	2040	2045	Δ	AAGR	Δ	AAGR	Δ	AAGR
K	890	1,054	937	957	956	944	953	944	941	926	0	0.0%	-18	-0.2%	-18	-0.1%
1	1,036	994	1,096	983	1,032	960	982	983	980	964	23	0.2%	-20	-0.2%	4	0.0%
2	1,068	1,082	985	1,121	1,002	1,065	1,006	1,006	1,003	986	-59	-0.6%	-19	-0.2%	-79	-0.4%
3	1,059	1,086	1,102	1,018	1,148	996	1,068	1,025	1,020	1,006	29	0.3%	-19	-0.2%	10	0.1%
4	1,126	1,090	1,104	1,111	1,029	1,141	1,076	1,040	1,028	1,018	-101	-0.9%	-22	-0.2%	-123	-0.6%
5	1,115	1,130	1,074	1,090	1,101	1,043	1,031	1,039	1,027	1,020	-4	0.0%	-19	-0.2%	-23	-0.1%
6	1,129	1,122	1,097	1,081	1,064	1,067	999	1,016	1,015	1,008	-51	-0.5%	-8	-0.1%	-59	-0.3%
7	1,173	1,149	1,081	1,065	1,077	1,041	1,063	1,005	1,003	996	-36	-0.4%	-9	-0.1%	-45	-0.2%
8	1,166	1,155	1,123	1,084	1,066	1,060	982	1,044	1,002	993	-16	-0.2%	-51	-0.5%	-67	-0.3%
9	1,056	1,131	1,106	1,099	1,091	1,086	1,107	1,047	1,012	996	-39	-0.4%	-51	-0.5%	-90	-0.4%
10	1,033	1,075	1,119	1,084	1,086	1,088	1,009	999	1,005	990	-89	-0.8%	-9	-0.1%	-98	-0.5%
11	1,066	997	1,033	1,072	1,067	1,070	1,025	965	976	972	-105	-1.0%	6	0.1%	-98	-0.5%
12	1,023	1,070	992	985	1,067	1,011	995	1,016	960	953	5	0.0%	-63	-0.6%	-58	-0.3%
Total	13,940	14,135	13,849	13,750	13,786	13,572	13,295	13,130	12,971	12,829	-442	-0.3%	-301	-0.2%	-743	-0.3%
K-5	6,294	6,436	6,298	6,280	6,268	6,149	6,115	6,037	5,999	5,920	-112	-0.2%	-117	-0.2%	-229	-0.2%
6-8	3,468	3,426	3,301	3,230	3,207	3,168	3,044	3,065	3,020	2,997	-103	-0.3%	-68	-0.2%	-171	-0.3%
9-12	4,178	4,273	4,250	4,240	4,311	4,255	4,135	4,027	3,952	3,911	-228	-0.5%	-117	-0.3%	-344	-0.4%



SOURCE: Oregon Department of Education, JOHNSON ECONOMICS

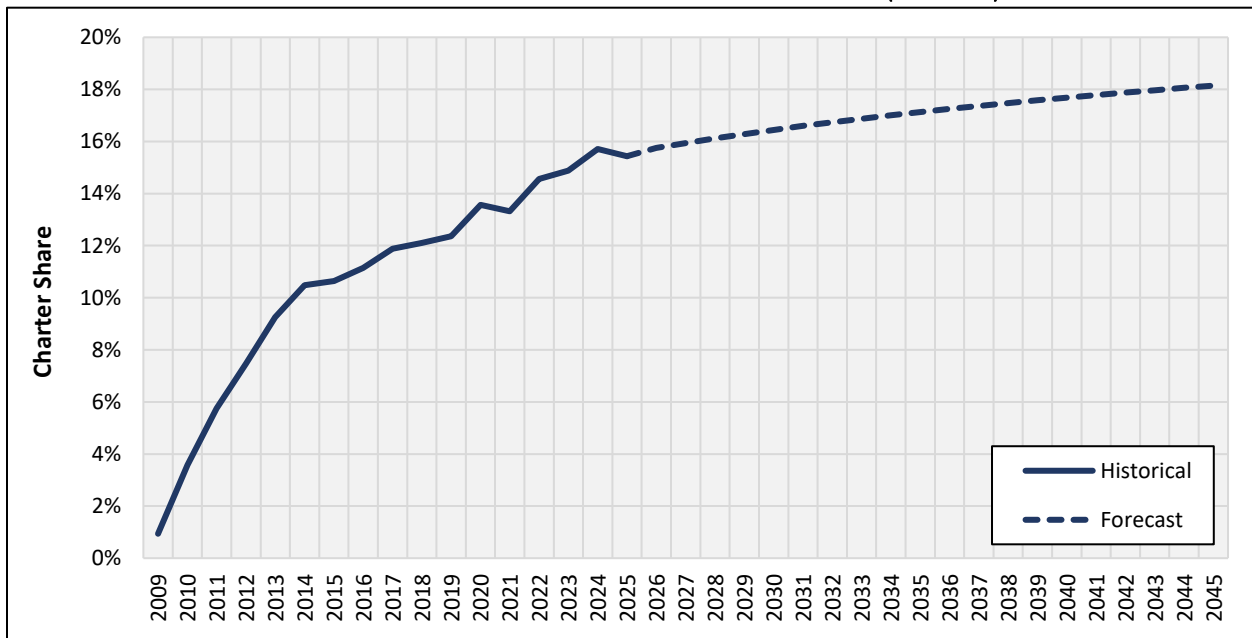


CHARTER SCHOOL VS. TRADITIONAL SCHOOL ENROLLMENT

As discussed in Section III, public charter schools have accounted for much of the enrollment growth over the past decade, and have continued to grow until the present. Charter school enrollment grew from 0 in 2006 to 2,095 in 2025, now accounting for 15% of total public enrollment. The enrollment growth was strongest early in the last decade, and has been more moderate in recent years.

Future charter school enrollment will depend on capacity constraints at existing schools and the approval of new schools. If or when new schools open, there might be rapid enrollment growth for a few years, followed by more moderate growth as the new schools fill up. In the following, we will assume gradual growth in charter school enrollment, with continued increase in the share of total enrollment from the current 15% to 18% by 2045. As an extension of the current trend, the share of total enrollment is projected to increase at a moderating rate (logarithmic trend line), gaining 1.0 percentage points over the first five years and 0.5 percentage points over the last five years.

FIGURE 5.5: CHARTER SCHOOL SHARE OF MSD ENROLLMENT (2006-45)



SOURCE: Oregon Department of Education, JOHNSON ECONOMICS

The above assumptions indicate an increase from around 2,100 to 2,330 charter school students over the next 20 years (see tables next page). Charter school enrollment is modeled for each grade level individually, taking into account recent trends in terms of capture of total enrollment growth in each grade. Elementary schools are projected to see the strongest gains over the period (+160 students), while the middle and high school levels are projected to see smaller gains (+20 and +50 students, respectively).

Projected charter school enrollment is subtracted from total public enrollment to arrive at enrollment at traditional schools. At the traditional schools, a decline of 600 students is expected over the first 10 years, followed by a decline of around 400 students in the subsequent 10-year period. The elementary and high school levels are each anticipated to represent around 40% of these declines, while the middle school level will account for the remaining 20%.



FIGURE 5.6: ENROLLMENT FORECAST, TRADITIONAL AND CHARTER SCHOOLS, MSD (2025-2045)

TRADITIONAL SCHOOLS																
Grade	ACTUAL ENROLLMENT						FORECAST ENROLLMENT				2025-2035		2035-2045		2025-2045	
	2020	2021	2022	2023	2024	2025	2030	2035	2040	2045	Δ	AAGR	Δ	AAGR	Δ	AAGR
K	750	908	774	786	762	776	773	759	751	734	-17	-0.2%	-25	-0.3%	-42	-0.3%
1	874	837	912	793	816	774	780	773	764	746	-1	0.0%	-28	-0.4%	-28	-0.2%
2	906	905	812	921	779	861	795	787	777	758	-74	-0.9%	-28	-0.4%	-103	-0.6%
3	879	926	905	834	922	782	817	775	763	746	-7	-0.1%	-29	-0.4%	-36	-0.2%
4	972	913	923	898	834	938	879	842	826	813	-96	-1.1%	-29	-0.4%	-125	-0.7%
5	941	969	894	910	899	839	811	809	792	781	-30	-0.4%	-28	-0.3%	-58	-0.4%
6	928	916	883	878	898	888	817	824	817	806	-64	-0.7%	-18	-0.2%	-82	-0.5%
7	961	939	854	881	875	873	906	850	844	834	-23	-0.3%	-16	-0.2%	-39	-0.2%
8	949	959	933	897	890	875	811	855	815	803	-20	-0.2%	-52	-0.6%	-72	-0.4%
9	980	1,052	1,029	1,011	989	979	978	920	886	869	-59	-0.6%	-51	-0.6%	-110	-0.6%
10	971	1,002	1,035	1,002	1,005	993	917	905	907	891	-88	-0.9%	-14	-0.2%	-102	-0.5%
11	992	920	955	976	977	973	927	869	876	869	-104	-1.1%	-1	0.0%	-104	-0.6%
12	946	1,006	923	917	974	926	898	913	860	851	-13	-0.1%	-62	-0.7%	-75	-0.4%
Total	12,049	12,252	11,832	11,704	11,620	11,477	11,108	10,882	10,677	10,502	-595	-0.5%	-380	-0.4%	-975	-0.4%
K-5	5,322	5,458	5,220	5,142	5,012	4,970	4,854	4,745	4,673	4,578	-225	-0.5%	-167	-0.4%	-392	-0.4%
6-8	2,838	2,814	2,670	2,656	2,663	2,636	2,534	2,529	2,476	2,443	-107	-0.4%	-86	-0.3%	-193	-0.4%
9-12	3,889	3,980	3,942	3,906	3,945	3,871	3,719	3,607	3,528	3,480	-264	-0.7%	-128	-0.4%	-391	-0.5%

CHARTER SCHOOLS																
Grade	ACTUAL ENROLLMENT						FORECAST ENROLLMENT				2025-2035		2035-2045		2025-2045	
	2020	2021	2022	2023	2024	2025	2030	2035	2040	2045	Δ	AAGR	Δ	AAGR	Δ	AAGR
Total	1,891	1,883	2,017	2,046	2,166	2,095	2,187	2,248	2,294	2,327	153	0.7%	79	0.3%	232	0.5%
K-5	972	978	1,078	1,138	1,256	1,179	1,261	1,292	1,326	1,342	113	0.9%	50	0.4%	163	0.6%
6-8	630	612	631	574	544	532	510	536	544	554	4	0.1%	18	0.3%	22	0.2%
9-12	289	293	308	334	366	384	416	420	424	431	36	0.9%	11	0.3%	47	0.6%

SOURCE: Oregon Department of Education, JOHNSON ECONOMICS



VI. ENROLLMENT FORECAST BY SCHOOL

METHODOLOGY

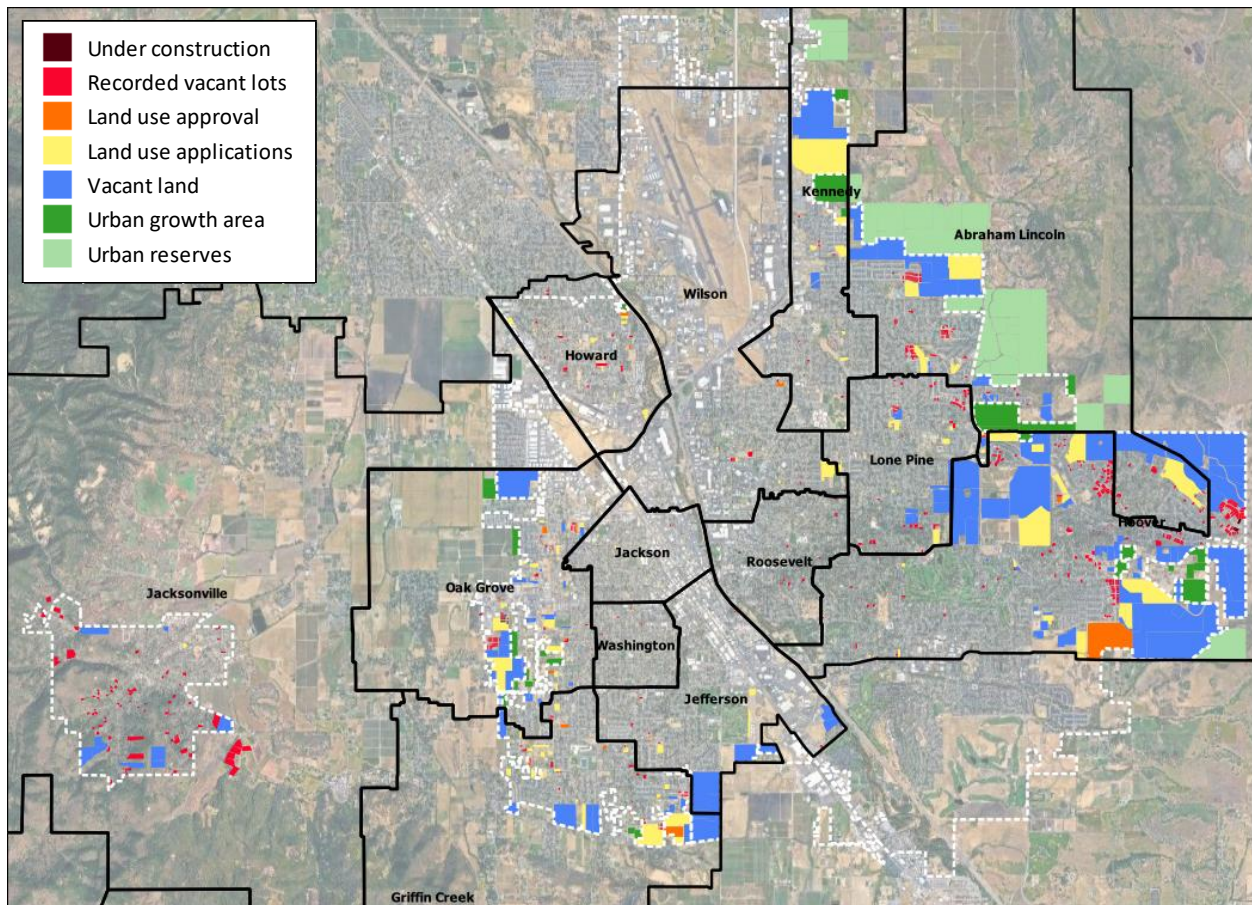
In this section, we allocate the forecasted district-wide enrollment to individual schools within the district. This exercise highlights the likely path of growth as well as potential capacity constraints.

We utilize a "top-down" allocation method that incorporates a series of variables with impact on enrollment, including births, ratios between births and kindergarten enrollment five years later, and school-specific grade progression ratios (GPRs). These factors are all affected by changes to the housing inventory. We therefore analyze historical trends in these variables relative to the historical housing inventory. We then model future housing construction in each ESAA and develop growth-adjusted estimates of future births, kindergarten enrollment, and GPRs in the ESAs. These factors are discussed in more detail over the next pages. We begin with housing construction.

NEW HOUSING

Our modeling of future household growth in the MSD is conducted in GIS, and takes into account housing under construction, approved projects, projects under review, vacant lots, and additional residential land. Data for this analysis was provided by county and city planning departments. The following map displays residential land with potential for future housing in the central portion of the MSD.

FIGURE 6.1: RESIDENTIAL LAND BY DEVELOPMENT AND ENTITLEMENT CATEGORY

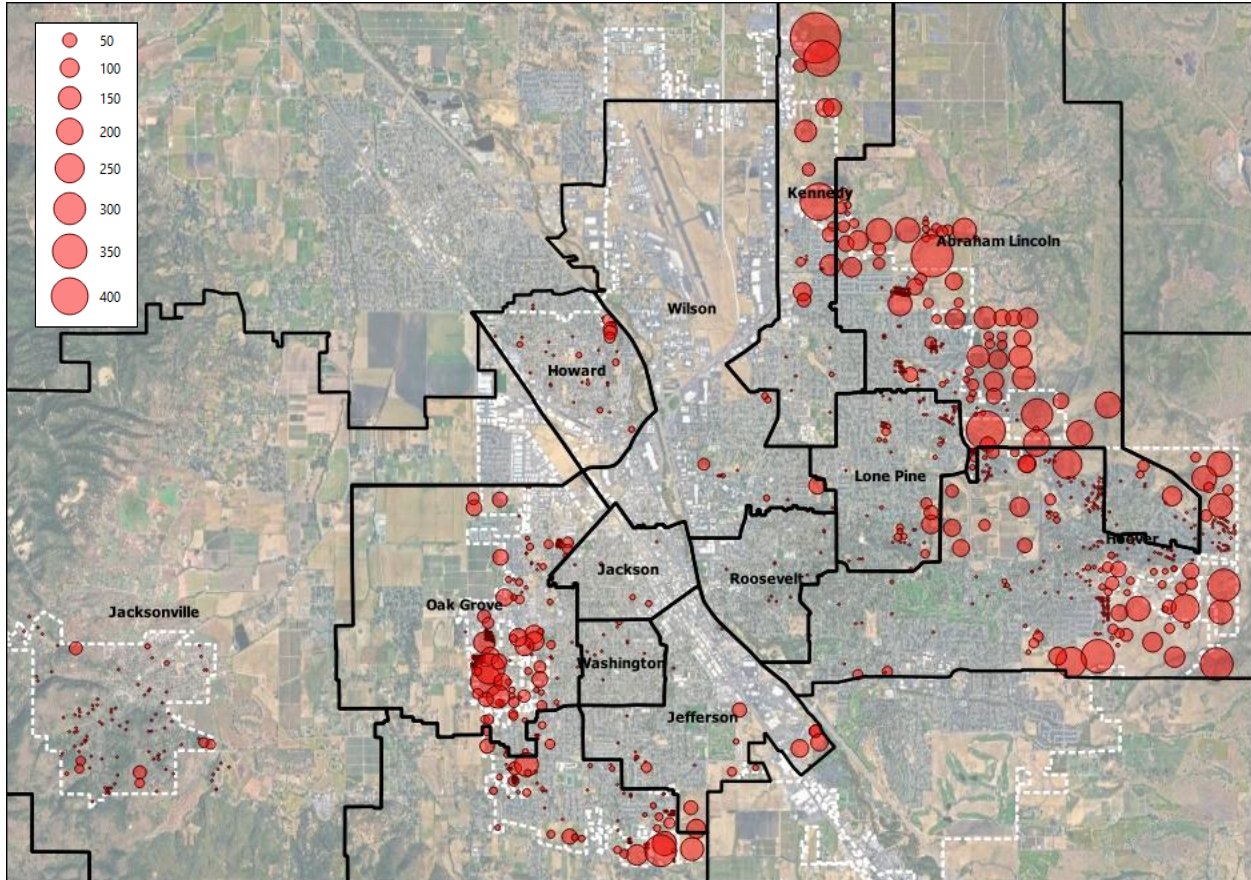


SOURCE: Jackson County, City of Medford, City of Jacksonville, City of Central Point, Google, JOHNSON ECONOMICS



In order to estimate the number and type of new housing units that may be built on vacant land, we apply density assumptions provided by city planners or derived from recent development in various zoning districts in each area. For properties that already have submitted land use applications, we use the unit counts provided in the applications. The following map displays the residential land with points sized by the potential number of housing units.

FIGURE 6.2: POTENTIAL HOUSING SUPPLY (UNITS), MSD



	Under construction	Recorded vacant lots	Land use approval	Land use applications	Vacant city land	Urban growth area	Urban reserves	Total
Abraham Lincoln	1	121		398	676	633	2,814	4,643
Griffin Creek		85	260	586	292	36		1,259
Hoover	3	190	261	877	1,731	471	248	3,781
Howard		19	53	100	1	40		213
Jackson		3		16				19
Jacksonville		91		4	187			282
Jefferson		10		82	306			398
Kennedy		10		216	239	495	897	1,857
Lone Pine		54		30	220			304
Oak Grove	58	81	64	758	997	364		2,322
Roosevelt	1	11						12
Ruch								0
Washington		9		6				15
Wilson	9	7	9	119				144
Total	72	691	647	3,192	4,649	2,039	3,959	15,249

SOURCE: Jackson County, City of Medford, City of Jacksonville, City of Central Point, Google, JOHNSON ECONOMICS



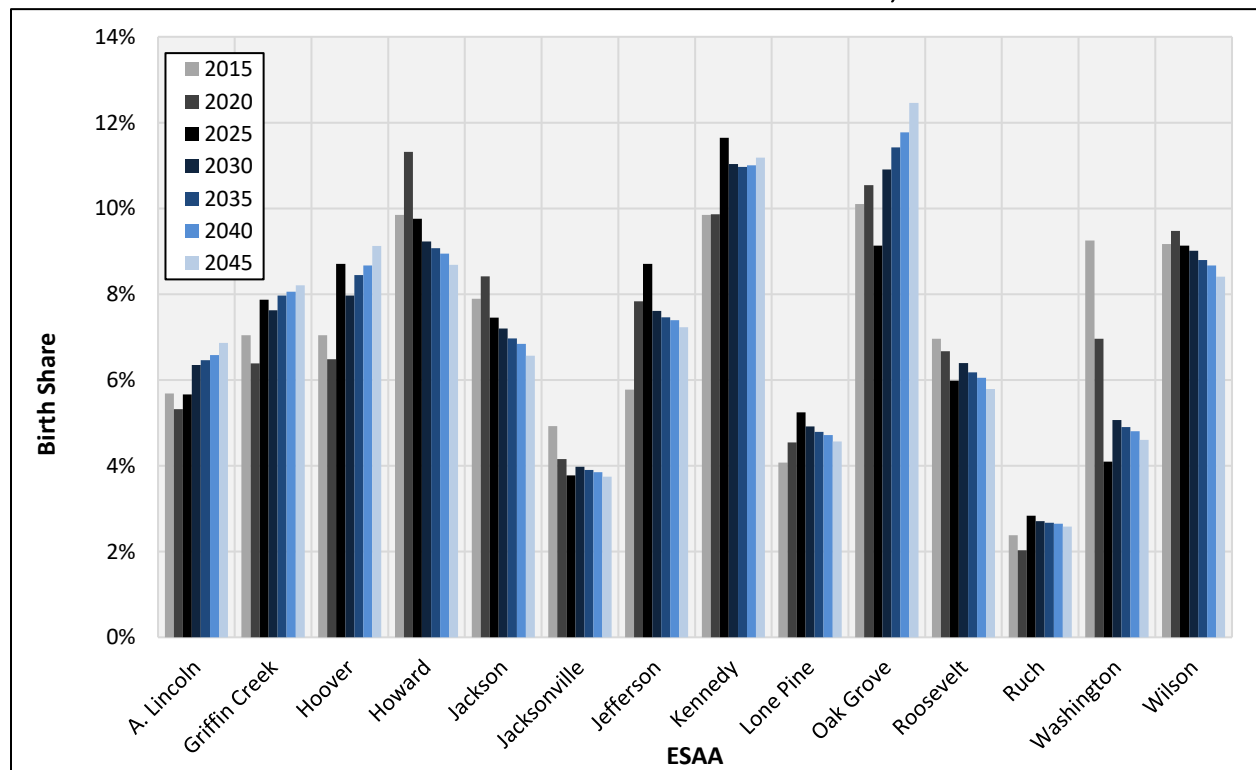
When we model future household growth by ESAA, we take into account construction and entitlement status of the different land categories. Housing units permitted in 2024 are assumed completed and occupied prior to October 1, 2025, and thus reflected in fall 2025 enrollment. Homes currently under construction are assumed to be available for occupancy prior to October 1, 2026. A few recorded vacant lots are also assumed to be built and occupied by fall 2026. Approved multifamily projects are allocated to future years based on available construction information, while projects with submitted land use applications are allocated based on typical buildout and absorption rates. Vacant land within city limits that does not yet have land use applications are assumed to have the first homes available for occupancy by fall 2029, while land outside current city limits (one with current annexation application) is assumed to produce housing starting in 2032. For each category, we limit the maximum possible market share in each year. Note that throughout the entire forecast period, we also assume continued rural homebuilding equal to the average over the past 15 years in each ESAA, reflecting the relatively stable rate of rural homebuilding.

The model assumes that each ESAA will capture a share of the new housing construction equal to its share of potential housing supply in each future year, plus rural homebuilding. Homes and multifamily projects currently under construction impact our estimates of housing absorption over the first two years. Absorption beyond that is controlled by our household growth forecast presented in Section IV.

BIRTHS

Our birth forecast for the MSD is allocated to ESAs based on the historical birth share of each ESAA relative to its share of the MSD housing inventory. As new housing construction in the future shifts the inventory shares in the district, the birth shares also change. According to our model, Oak Grove and Hoover will see the greatest gains in their shares of births over the next 20 years, while Jefferson and Howard will see the steepest declines.

FIGURE 6.3: HISTORICAL AND PROJECTED MSD BIRTH SHARE, BY ESAA

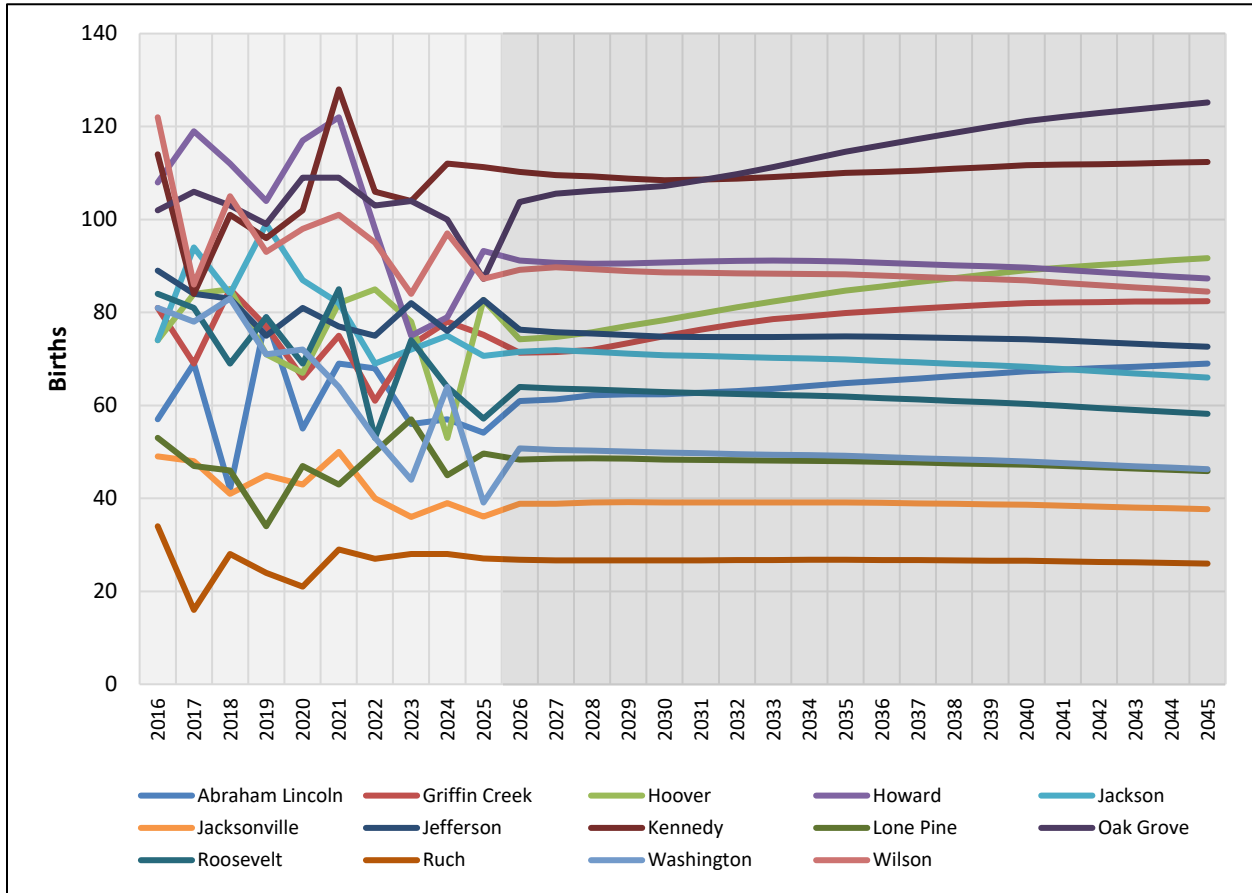


SOURCE: Oregon Health Authority, JOHNSON ECONOMICS



Our birth forecast for the ESAAs in the MSD is displayed below. Kennedy is expected to have the highest number of births over the 20-year period, though Oak Grove is anticipated to match Kennedy toward the end of the period. Ruch is projected to see the lowest number of births, in line with the recent trend.

FIGURE 6.4: HISTORICAL AND PROJECTED BIRTHS, BY ESAA



SOURCE: Oregon Health Authority, JOHNSON ECONOMICS

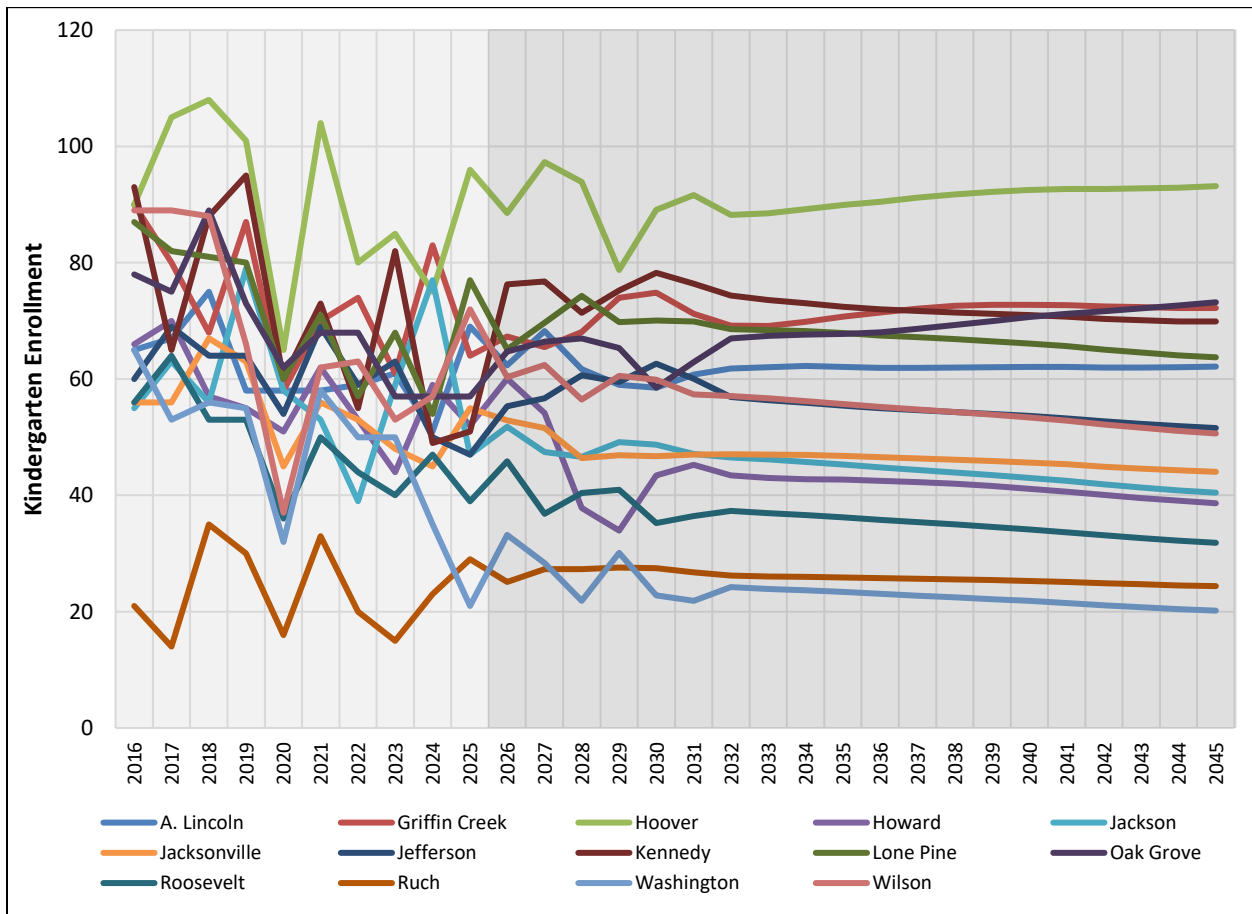
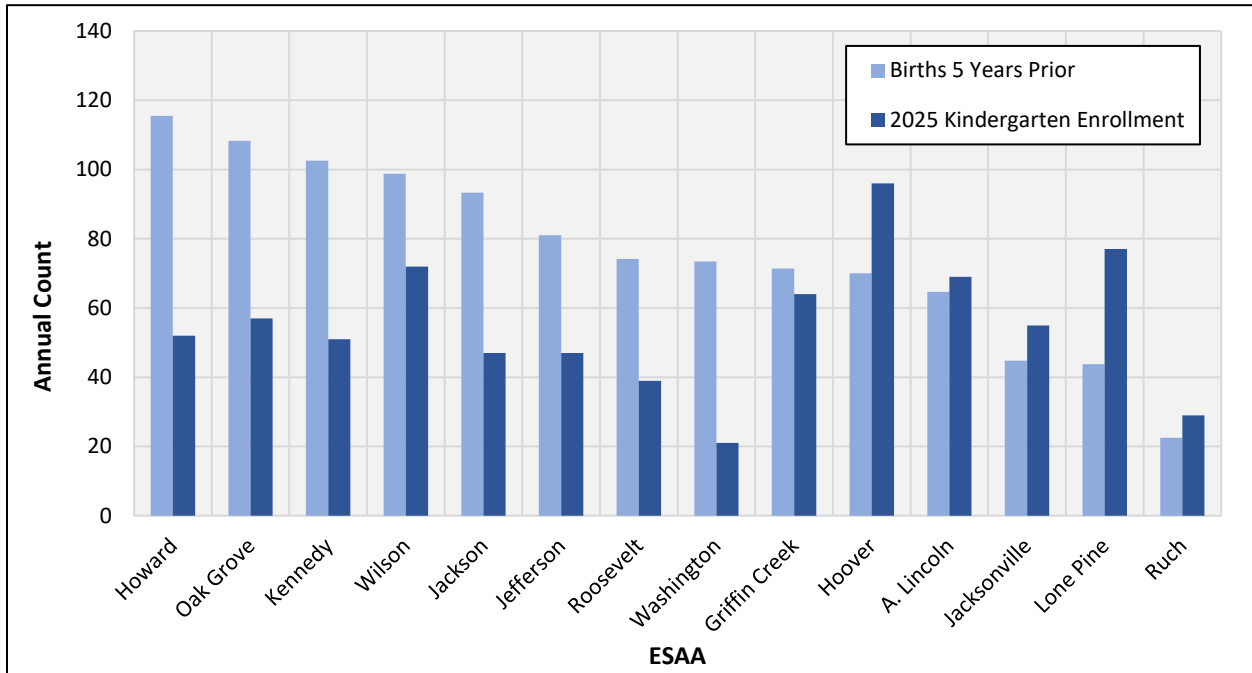
KINDERGARTEN CAPTURE

As discussed in Section V, there is a clear relationship between the number of births in an area and kindergarten enrollment five years later. However, the correlation is much stronger for an entire region than for small geographic areas, as families are more likely to move within a region than between regions in the years between birth and kindergarten. While housing affordability is among the most important determinants for where a young couple lives around the time it establishes a family, a family-friendly environment (single-family housing, backyards, parks, low traffic, low crime, good schools) become more important for families as their children approach school age. This affects the ratio between kindergarten enrollment and births five years prior in the ESAAs. In the MSD, this appears to result in a migration of young families from the west to the east. The Howard ESAA had the largest number of births in 2020-21, but Hoover had the highest kindergarten enrollment in the fall of 2025 (see chart next page). Washington had the lowest enrollment-to-births ratio (29%), while Lone Pine had the highest (176%).

For our forecast of future kindergarten enrollment in each ESAA, we apply five-year average enrollment-birth differentials to future birth estimates for the ESAAs. The results are displayed on the next page.



FIGURE 6.5: 2025 K. ENROLLMENT AND BIRTHS FIVE YEARS PRIOR; K. ENROLLMENT FORECAST (2026-45)



SOURCE: Oregon Department of Education, Oregon Health Authority, JOHNSON ECONOMICS



GRADE PROGRESSION

Finally, we draw on historical GPRs within each ESAA in order to estimate future enrollment for levels 1-12. As our starting point, we use the mid-point between the 3-year and 10-year averages for each grade in each ESAA. We then apply adjustments to account for the change in housing inventory, based on historical relationships between GPRs and inventory growth in each ESAA. Because of the anticipated slowdown in household growth in the MSD over the next 20 years, the GPRs toward the end of the forecast period are lower than near-term GPRs. The resulting ESAA enrollment forecasts by grade are controlled by the district totals for traditional schools.

Average school level GPRs for the 2015-25 period are displayed in the table below. Note that for Oakdale Middle School and the Innovation Academy, the averages represent the 2023-25 period. Attendance areas with a lot of new housing supply generally exhibit the highest ratios, reflecting that these see stronger in-migration than the already built out areas. However, the attendance areas that have had the highest GPRs in recent years are also the areas that will see the greatest reduction in GPRs when the overall household growth slows, as is assumed in our long-term forecasts. Note that because the new middle school boundaries do not align with elementary boundaries, and the new high school boundaries do not align with middle school boundaries, we allocated students based on the 2023 geographic distribution of students in order to estimate the transitional GPRs for 6th and 9th grade.

FIGURE 6.6: 10-YEAR AVERAGE GRADE PROGRESSION RATIOS BY SCHOOL (2015-25)

SCHOOL	GRADE												Average	
	1	2	3	4	5	6	7	8	9	10	11	12		
A. Lincoln Elementary School	1.11	1.02	1.00	1.06	1.01									1.04
Griffin Creek Elementary School	1.05	1.01	1.04	1.00	1.00									1.02
Hoover Elementary School	1.09	1.05	1.05	1.04	0.96									1.04
Howard Elementary School	0.95	0.97	0.96	1.00	0.96									0.97
Jackson Elementary School	0.99	0.93	0.98	0.90	1.03									0.97
Jacksonville Elementary School	1.01	1.03	0.98	1.02	0.93									0.99
Jefferson Elementary School	1.06	1.00	0.99	0.98	0.99									1.01
Kennedy Elementary School	1.00	0.98	0.97	0.99	1.00									0.99
Lone Pine Elementary School	1.01	1.08	1.07	1.02	1.06									1.05
Oak Grove Elementary School	1.01	0.98	1.01	0.99	1.05									1.01
Roosevelt Elementary School	1.05	1.02	1.02	1.07	1.03									1.04
Ruch Elementary School	1.02	1.11	0.98	1.11	0.99									1.04
Washington Elementary School	0.87	0.94	0.95	0.96	0.97									0.94
Wilson Elementary School	0.89	0.96	1.00	0.97	0.94									0.95
Hedrick Middle School						0.98	0.98	0.99						0.98
McLoughlin Middle School						1.01	0.94	1.00						0.98
Oakdale Middle School*						0.93	0.94	0.96						0.94
Ruch Middle School						1.06	1.05	0.92						1.01
North Medford High School									1.07	0.95	0.92	0.94		0.97
South Medford High School									1.11	0.97	0.94	0.94		0.99
Innovation Academy*										1.53	1.08	0.95		1.19

* Averages represent 2023-25 period for Oakdale and Innovation Academy.

SOURCE: Oregon Department of Education, JOHNSON ECONOMICS

FORECAST BY SCHOOL

Our enrollment projections by school are summarized on the next page. Note that we advise some caution when interpreting long-term forecasts for individual schools, especially at the elementary level. Input variables for small areas tend to exhibit a great degree of variability, with relatively small changes having significant impact over time.



FIGURE 6.7: ENROLLMENT FORECAST BY SCHOOL, MSD (2026-45)

School	ACTUAL ENROLLMENT					FORECAST ENROLLMENT								2025-2035		2035-2045		2025-2045	
	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2035	2040	2045	Δ	AAGR	Δ	AAGR	Δ	AAGR
ELEMENTARY																			
Wilson (K-5)	353	338	312	306	300	307	302	311	317	317	293	280	266	-7	-0.3%	-26	-0.9%	-34	-0.6%
Hoover (K-5)	607	593	586	591	587	570	572	597	600	609	586	589	591	-1	0.0%	5	0.1%	4	0.0%
Lone Pine (K-5)	456	437	462	461	480	491	496	504	498	506	486	474	459	6	0.1%	-27	-0.6%	-21	-0.2%
Kennedy (K-5)	423	393	414	393	402	414	414	422	406	437	472	459	452	70	1.6%	-19	-0.4%	50	0.6%
Roosevelt (K-5)	312	341	330	308	306	307	290	284	277	267	243	236	221	-63	-2.3%	-22	-0.9%	-85	-1.6%
A. Lincoln (K-5)	410	411	415	401	409	418	424	415	400	404	400	408	407	-9	-0.2%	7	0.2%	-2	0.0%
Griffin Creek (K-5)	464	501	474	492	460	445	445	456	475	472	456	456	454	-4	-0.1%	-3	-0.1%	-6	-0.1%
Oak Grove (K-5)	413	416	415	398	389	391	385	382	386	389	416	436	448	27	0.7%	33	0.8%	59	0.7%
Jacksonville (K-5)	334	342	330	328	331	325	320	314	301	296	275	270	262	-56	-1.8%	-13	-0.5%	-69	-1.2%
Jefferson (K-5)	391	380	393	381	372	361	347	346	339	352	365	343	331	-7	-0.2%	-34	-1.0%	-41	-0.6%
Jackson (K-5)	317	295	309	321	323	330	320	320	299	276	264	251	237	-59	-2.0%	-27	-1.1%	-86	-1.5%
Washington (K-5)	280	258	263	221	177	168	158	138	132	122	109	106	98	-68	-4.7%	-11	-1.0%	-79	-2.9%
Howard (K-5)	327	315	283	275	293	288	281	271	259	245	224	217	206	-69	-2.6%	-19	-0.9%	-87	-1.8%
Ruch (K-5)	157	152	133	129	141	147	150	157	169	177	171	165	160	30	1.9%	-11	-0.7%	19	0.6%
MIDDLE																			
Hedrick (6-8)	999	949	970	952	991	966	984	989	1,052	975	1,000	998	982	9	0.1%	-18	-0.2%	-9	0.0%
McLoughlin (6-8)	971	940	738	826	830	827	873	836	833	857	779	742	734	-51	-0.6%	-44	-0.6%	-96	-0.6%
Oakdale (6-8)			822	745	739	734	805	779	753	706	730	720	713	-9	N/A	-17	-0.2%	-26	N/A
Ruch (6-8)	67	82	55	68	71	81	86	84	82	78	109	104	102	38	4.4%	-8	-0.7%	31	1.8%
HIGH																			
North (9-12)	1,760	1,701	1,661	1,721	1,749	1,746	1,710	1,650	1,643	1,690	1,713	1,688	1,672	-36	-0.2%	-41	-0.2%	-77	-0.2%
South (9-12)	1,850	1,870	1,945	1,856	1,864	1,892	1,871	1,890	1,836	1,824	1,697	1,653	1,623	-167	-0.9%	-74	-0.4%	-241	-0.7%
Innov. Acad. (9-12)			263	327	181	215	212	209	206	206	201	197	195	20	N/A	-6	-0.3%	14	N/A
TOTAL:	12,650	12,679	12,049	12,252	11,832	11,344	11,358	11,269	11,181	11,126	10,880	10,689	10,513	-952	-0.8%	-367	-0.3%	-1,319	-0.6%

SOURCE: Oregon Department of Education, JOHNSON ECONOMICS

ELEMENTARY SCHOOLS

At the elementary level, the forecast indicates fairly stable enrollment at the north/east schools over the next 10 years, with household growth making up for smaller cohorts. These schools include the three easternmost ESAs, where most of the new housing is expected to be built: Hoover, Kennedy, and Abraham Lincoln. Among the south/west schools, Oak Grove is expected to expand for the same reason, while Ruch is anticipated to grow due to dispersed rural homebuilding. However, in total, the south/west elementary schools are estimated to lose 200 students over the next 10 years. Declines are anticipated in the already built-out ESAs, especially in the ESAs dominated by single-family housing. In some of these ESAs – like Roosevelt and Washington – the tendency among young families to move out prior to kindergarten is expected to result in steep enrollment declines.

MIDDLE SCHOOLS

At the middle school level, Hedrick is estimated to see stable enrollment over the next 10 years, reflecting the homebuilding and migration of families to this attendance area. However, McLoughlin and Oakdale are expected to see moderate declines. Ruch is modeled to see a significant gain, reflecting continued homebuilding and high rates of grade progression.

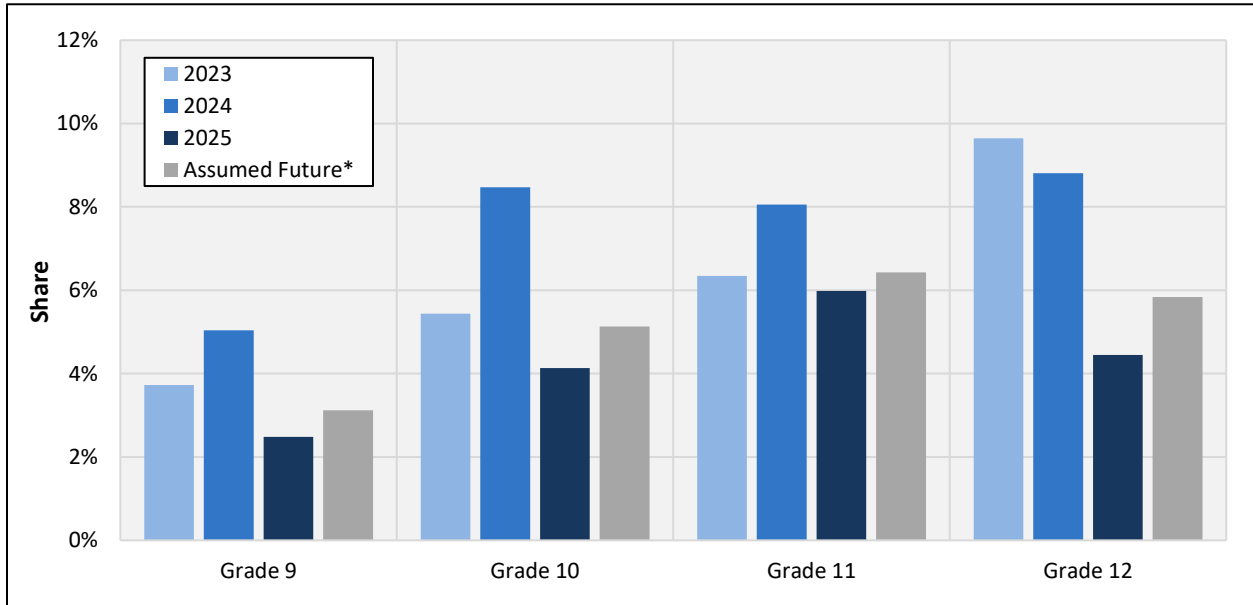
HIGH SCHOOLS

The two main high schools are both expected to see declines over the next 10 years. South is modeled to lose 170 students on the net, while North is estimated to lose 40. For the Innovation Academy, we have used a weighted



average of the share of total enrollment over the past three years to model enrollment over the coming years. The assumed future share in each grade is weighted 70% to fall 2025 enrollment, 20% to fall 2024, and 10% to fall 2023. As shown in the following chart, the Academy's share of total enrollment was significantly lower in 2025 than 2024.

FIGURE 6.8: INNOVATION ACADEMY, SHARE OF TOTAL ENROLLMENT, BY GRADE (2013-25 AND FUTURE ASSUMPTIONS)



* Assumptions for future shares gives 70% weight to 2025, 20% to 2024, and 10% to 2023.

SOURCE: Oregon Department of Education, JOHNSON ECONOMICS



ENROLLMENT VS. CAPACITY

Based on capacity numbers provided by the MSD, only South High School is projected to exceed capacity over the forecast period, and only by a small number in 2026-27 and 2028-29. This is based on the assumption that enrollment at the Innovation Academy will peak at 215. North Medford High is projected to be near capacity for much of the forecast period. Among the other schools, Ruch is modeled to get closest to capacity, peaking at 95% of capacity in 2033.

The charts on the next pages display the enrollment forecast for each school along with current capacity levels.

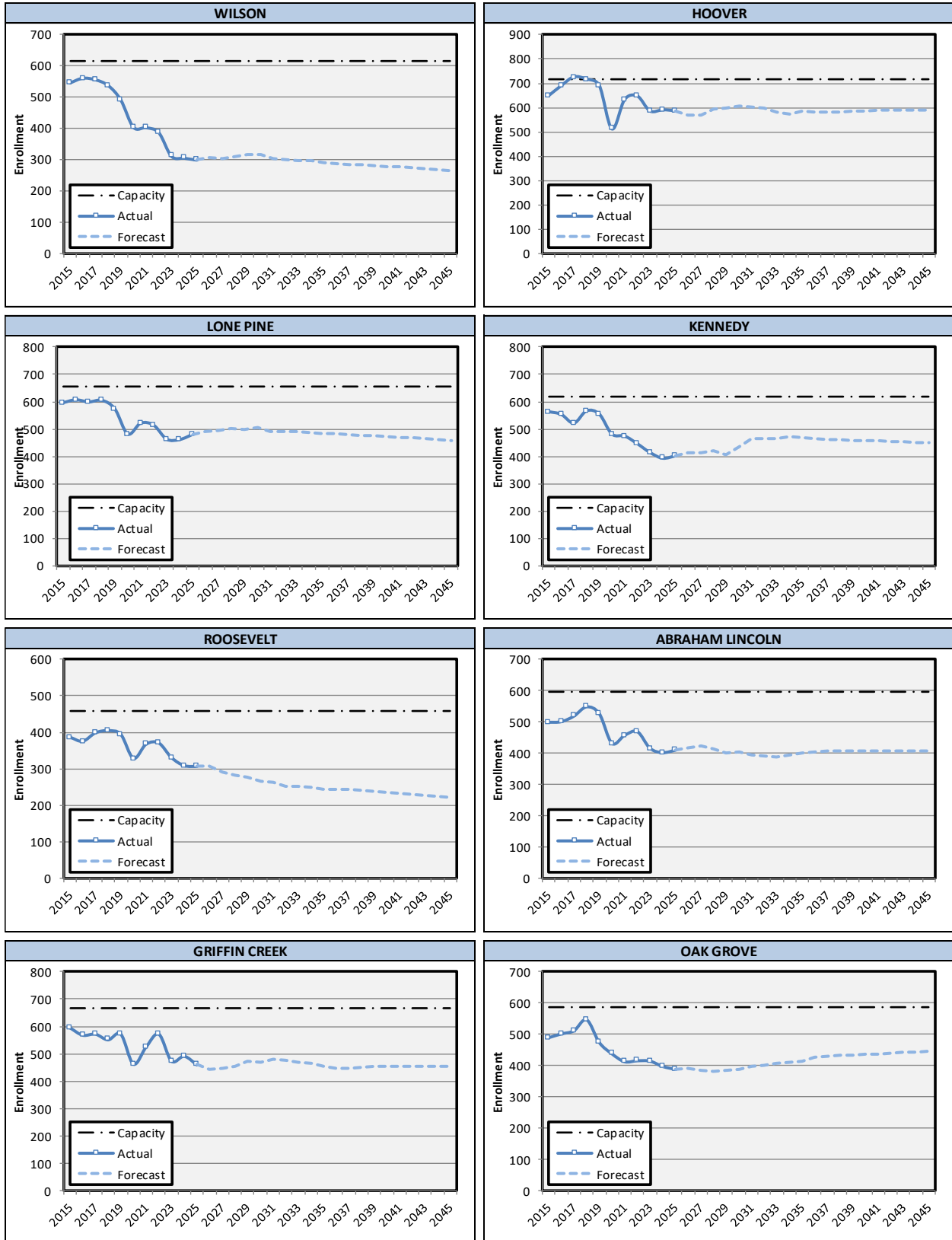
FIGURE 6.9: ENROLLMENT VS. CAPACITY BY SCHOOL, MSD (2026)

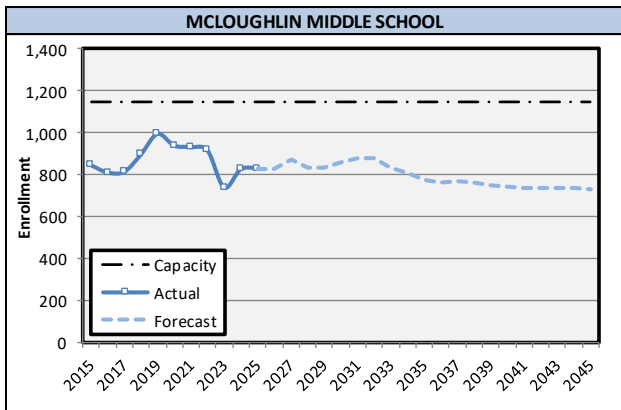
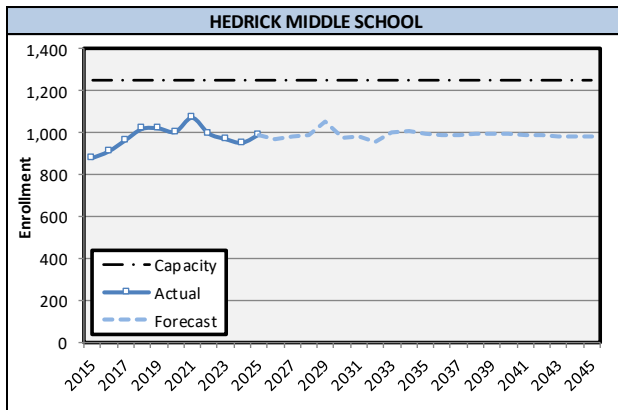
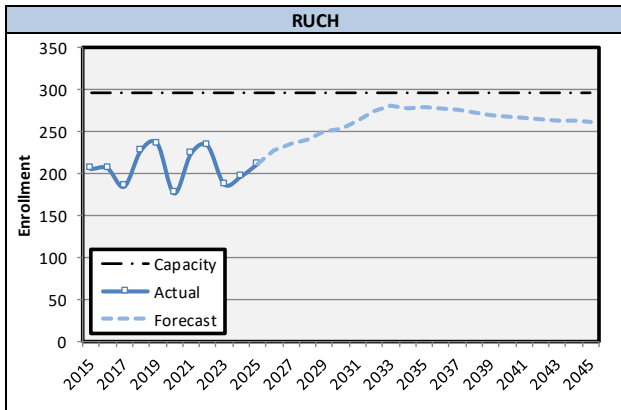
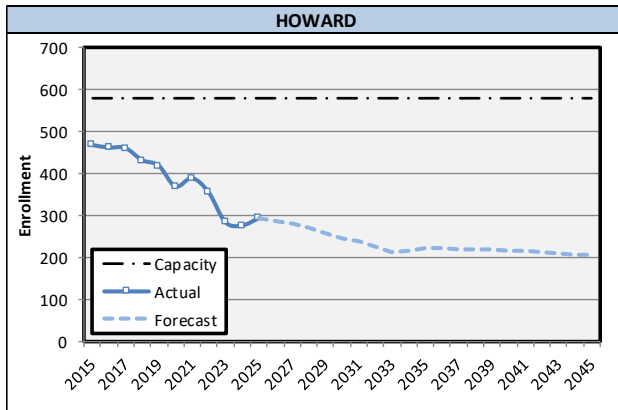
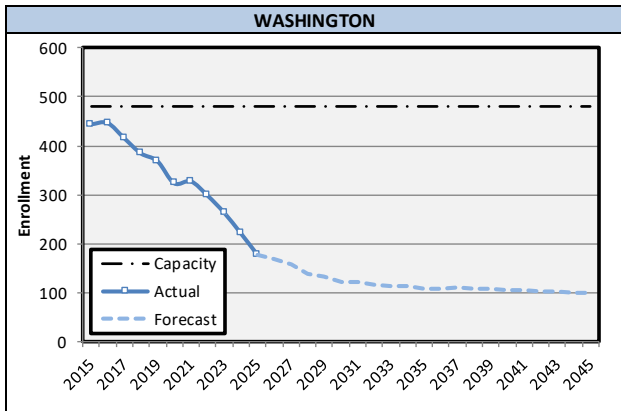
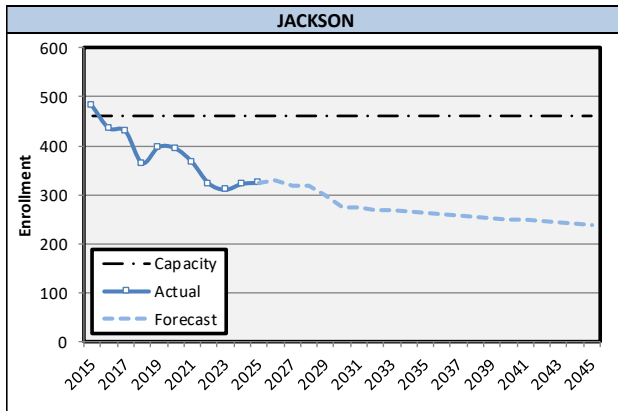
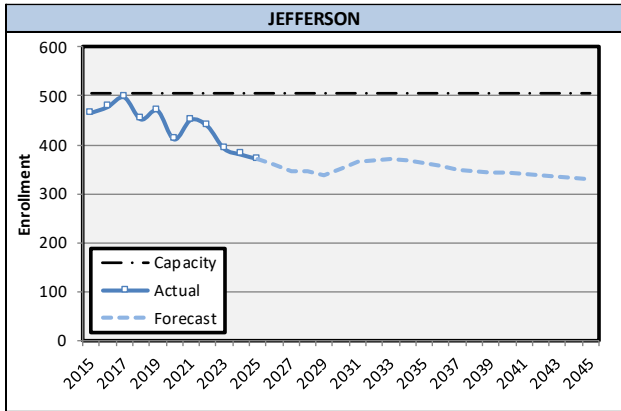
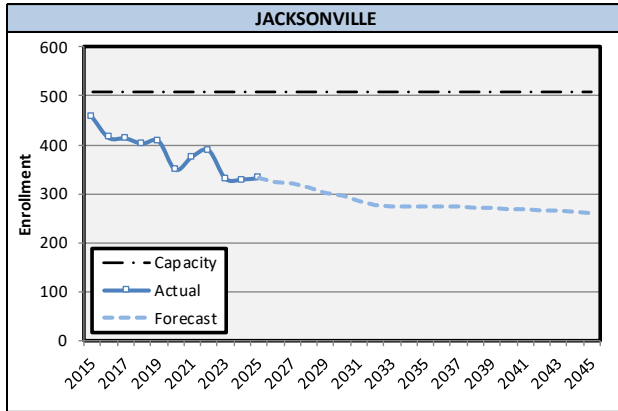
School	Address	Building Size / SF	2026 Capacity	2026 Forecast	Residual Capacity
Abraham Lincoln	3101 McLoughlin Drive	63,438	597	418	179
Griffin Creek	2430 Griffin Creek Road	54,930	667	445	222
Hoover	2323 Siskiyou Boulevard	55,403	715	570	145
Howard	286 Mace Road	59,530	579	288	291
Jackson	713 Summit Avenue	57,596	460	330	130
Jacksonville	655 Hueners Lane	57,561	507	325	182
Jefferson	333 Holmes Drive	52,943	505	361	144
Kennedy	2860 Keene Way Drive	54,788	617	414	203
Lone Pine	3158 Lone Pine Road	77,042	657	490	167
Oak Grove	2838 West Main Street	59,355	585	390	195
Roosevelt	1212 Queen Anne Avenue	51,002	457	307	150
Ruch	156 Upper Applegate Road	34,590	297	228	69
Washington	610 Peach Street	58,146	480	168	312
Wilson	1400 Johnson Street	52,660	615	307	308
Elementary Total:			7,738	5,041	2,697
<i>Hedrick</i>	1501 E. Jackson Street	158,990	1,253	966	287
<i>McLoughlin</i>	320 W 2nd Street	161,072	1,146	827	319
<i>Oakdale</i>	815 S Oakdale Avenue	251,721	1,247	734	513
Middle Total:			3,646	2,528	1,118
<i>North Medford</i>	1900 N. Keene Way Drive	234,121	1,784	1,746	38
<i>South Medford</i>	1551 Cunningham Avenue	255,000	1,879	1,892	-13
<i>Innovation Academy</i>	815 S Oakdale Avenue	251,721	450	215	235
High Total:			4,113	3,853	260

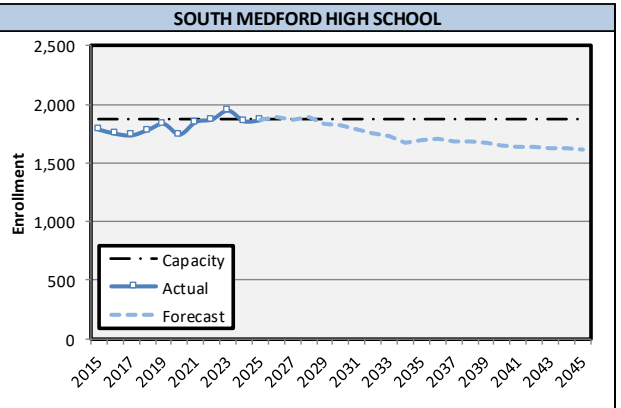
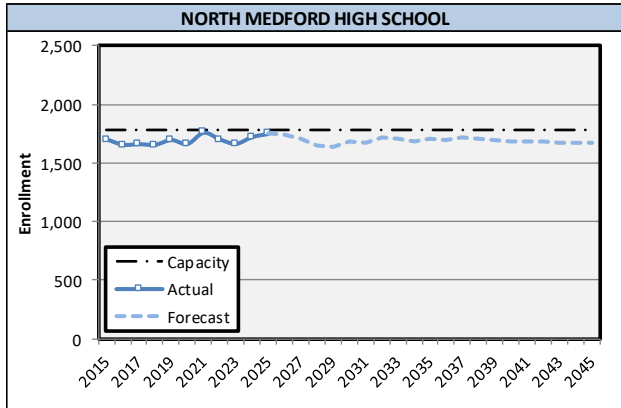
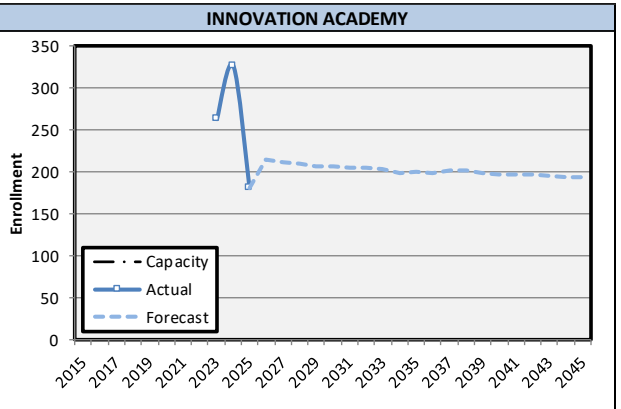
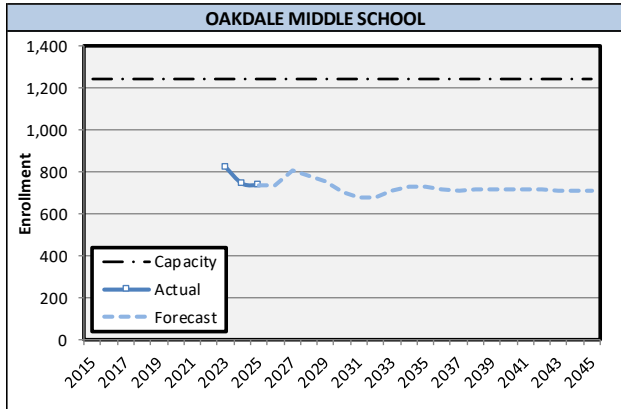
SOURCE: Oregon Department of Education, JOHNSON ECONOMICS



FIGURE 6.10: ENROLLMENT FORECAST AND CURRENT CAPACITY BY SCHOOL, MSD (2026-45)







School	2025	FORECAST ENROLLMENT																			
		2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045
ELEMENTARY																					
Wilson (K-5)	300	307	302	311	316	316	303	300	295	295	292	288	286	283	281	279	276	274	271	268	266
Hoover (K-5)	587	570	571	596	599	607	603	598	581	575	584	583	580	582	585	586	588	589	589	589	589
Lone Pine (K-5)	480	490	496	503	497	504	490	493	492	486	485	482	479	476	474	472	470	467	464	461	458
Kennedy (K-5)	402	414	414	421	405	436	465	465	465	471	470	465	462	460	459	457	456	455	453	452	451
Roosevelt (K-5)	306	307	289	283	277	267	263	252	252	248	242	243	242	240	237	235	232	229	226	223	221
A. Lincoln (K-5)	409	418	423	414	399	403	393	392	389	393	399	404	406	407	407	407	407	407	406	406	406
Griffin Creek (K-5)	460	445	445	455	474	470	480	476	469	464	455	448	447	449	452	454	455	455	454	453	452
Oak Grove (K-5)	389	390	384	381	385	387	396	402	407	411	414	425	431	432	433	435	437	440	442	444	447
Jacksonville (K-5)	331	325	320	314	300	296	285	277	273	274	274	274	273	272	271	269	268	266	265	263	261
Jefferson (K-5)	372	361	346	345	338	351	366	369	370	367	364	356	350	347	345	342	340	337	335	332	330
Jackson (K-5)	323	330	319	319	298	275	274	269	267	267	264	260	257	255	253	250	248	245	242	239	237
Washington (K-5)	177	168	158	138	132	122	121	115	112	113	109	109	109	108	107	105	104	102	101	99	98
Howard (K-5)	293	288	281	270	258	245	240	225	214	217	224	222	220	219	218	216	215	212	210	207	205
Ruch (K-5)	141	147	150	157	168	176	174	175	173	172	170	168	167	166	166	165	164	163	162	161	159
MIDDLE																					
Hedrick (6-8)	991	966	983	989	1,052	975	981	954	1,004	1,005	997	990	991	995	997	995	992	989	985	982	980
McLoughlin (6-8)	830	827	873	836	833	857	878	877	836	809	776	763	768	761	747	740	738	737	736	735	732
Oakdale (6-8)	739	734	805	779	753	706	678	680	708	732	728	717	713	717	720	718	716	714	712	712	711
Ruch (6-8)	71	81	86	84	82	78	89	99	108	106	109	109	108	107	105	104	103	103	102	102	101
HIGH																					
North (9-12)	1,749	1,746	1,710	1,650	1,643	1,690	1,670	1,716	1,712	1,684	1,711	1,691	1,714	1,702	1,691	1,684	1,684	1,682	1,678	1,672	1,668
South (9-12)	1,864	1,892	1,871	1,890	1,836	1,824	1,790	1,751	1,731	1,678	1,696	1,703	1,685	1,688	1,669	1,648	1,642	1,639	1,631	1,623	1,618
Innov. Acad. (9-12)	181	215	212	209	206	206	205	205	204	199	200	199	201	201	198	197	196	196	195	195	194

SOURCE: Oregon Department of Education, JOHNSON ECONOMICS



EXECUTIVE SUMMARY

Meeting Date:	January 15, 2026
Agenda Item:	Board Priority: Financial Stewardship
Item Type:	Report
Administrator:	Brad Earl
Objective:	Provide a Financial Update Report on the District

Background:

At the Board Retreat on September 5, 2025, the Board requested monthly financial updates. In response, Brad Earl will provide an update on the current financial status at this meeting, along with a progress report on the Fiscal Stability Study Group.

Additional Materials: [December Financial Reports](#)

Recommendation: N/A

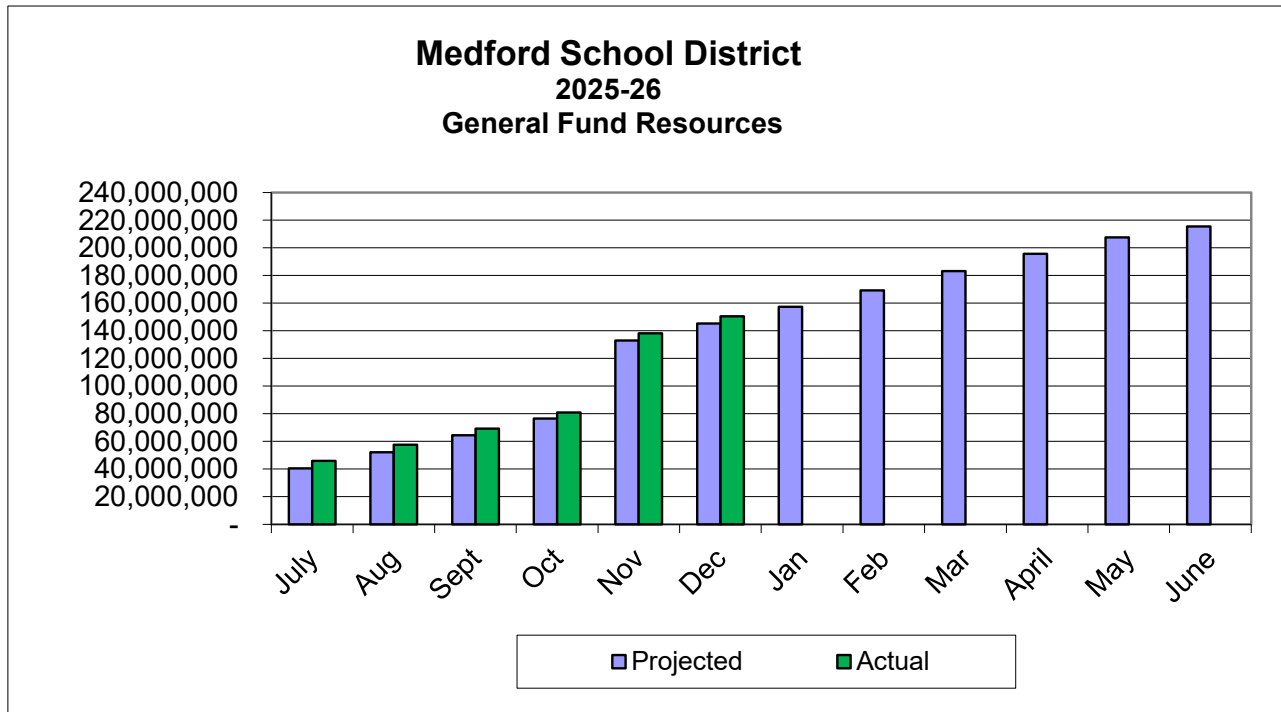
Suggested Motion: N/A

Medford School District 549C
General Fund
Statement of Resources
12/31/2025

<u>Resources</u>	Year-to-Date			Over/(under) Projection
	Adopted Budget FY 2025-26	Projected *	Actual 12/31/2025	
	Local Sources	\$ 54,288,532	\$ 47,279,633	\$ 48,274,865
Intermediate Sources	\$ 3,650,000	9,500	26,523	17,023
State Sources	\$ 137,996,564	80,050,000	79,055,660	(994,340)
Federal Sources	\$ 130,000	47,632	31,341	(16,291)
Transfers In	\$ 550,000	-	-	0
Total Revenue	\$ 196,615,096	127,386,765	127,388,389	1,624
Other Income/Expense GASB 87 & 96	\$ 1,500,000	-	-	0
Beginning Balance	\$ 17,802,295	17,802,295	23,058,686	5,256,391
Total Resources	\$ 215,917,391	\$ 145,189,060	\$ 150,447,075	5,258,015

* Forecast Projection of budget by month is based on historical average in most cases with some adjustment for recent trends

Revenue is essentially on budget. There will be a transfer in the first budget amendment to increase property tax and decrease SSF by offsetting \$1 million. Beginning fund balance was favorable \$5.25 million primarily due to under spending driven by staffing vacancies in the prior year and to a lesser extent favorable to higher than budgeted revenue in the prior year.

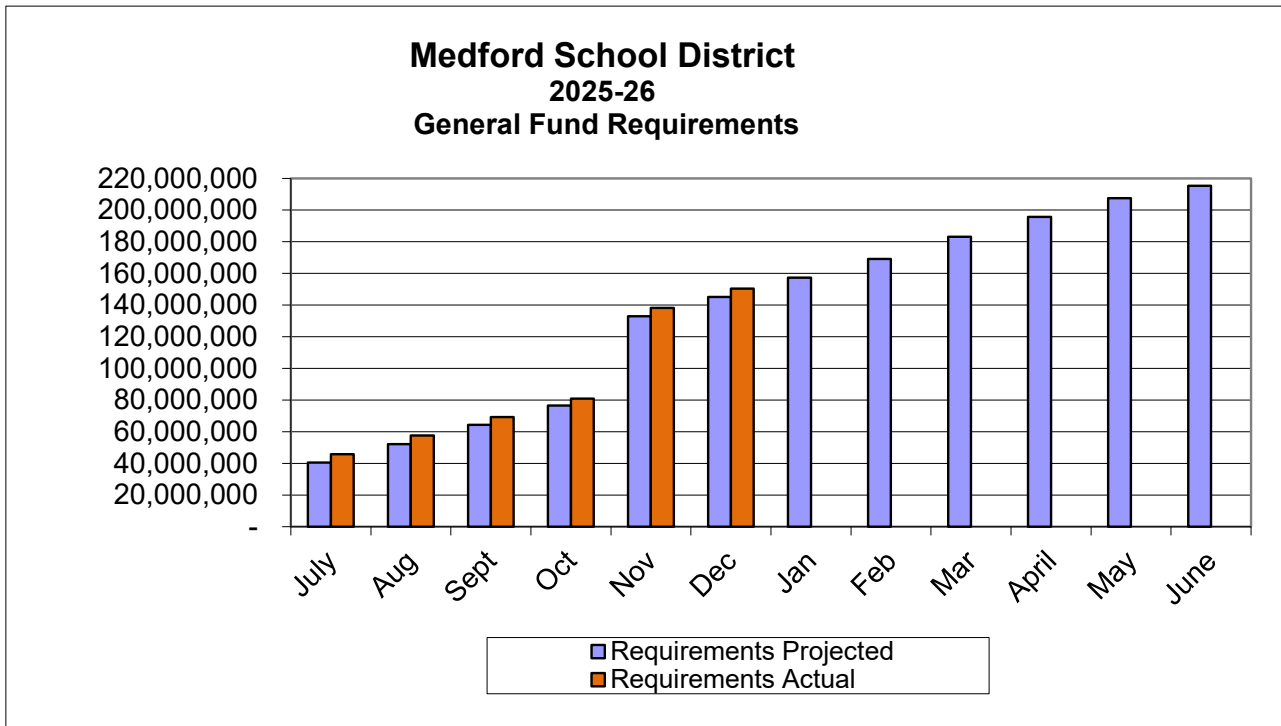


**Medford School District 549C
General Fund
Statement of Requirements/Reserves
12/31/2025**

	Amended Budget FY 2025-26	Year-to-Date		Over/(under) Projection
		Projected *	Actual 12/31/2025	
Requirements				
Salaries	\$ 83,699,035	\$ 32,537,411	\$ 31,883,576	(653,834)
Associated Payroll Costs	\$ 52,518,260	\$ 18,403,907	18,262,352	(141,555)
Purchased Services	\$ 43,550,664	\$ 22,150,000	22,142,454	(7,546)
Supplies & Materials	\$ 7,274,330	\$ 4,338,807	4,364,218	25,412
Capital Outlay/GASB 87 & 96	\$ 1,745,000	\$ 179,103	170,281	(8,822)
Dues & Fees & NPV GASB 87 and 96	\$ 1,637,806	\$ 1,507,583	1,873,200	365,617
Transfers Out	\$ 10,990,000	\$ 10,490,000	10,490,000	0
Total Expenditures	\$ 201,415,096	\$ 89,606,810	89,186,081	(420,729)
Contingency/Reserves	\$ 14,502,295	\$ 55,582,250	61,260,994	5,678,744
Total Requirements/Reserves	\$ 215,917,391	\$ 145,189,060	\$ 150,447,075	5,258,015

* Forecast Projection of budget by month is based on a historical averages in most cases with some adjustment for recent trends

Spending is under forecast \$0.43 million or 0.21%. Dues and fees is over forecast \$0.4 million or 24.0% due primarily to higher than anticipated insurance renewals for property, liability and cyber insurance. Purchased services are over due to transportation running higher due to more drivers/routes. Total drivers is close to precovid levels for the first time in many years. Please remember home to school (HTS) transportation is reimbursed at 70% by the state so any increase will be 70% funded. Primarily because of staffing vacancies, and if staffing vacancies in total remain constant, the District is trending to underspend approximately \$1.8 million in the General Fund for the full fiscal year.



Medford School District 549C
General Fund Statement of Resources and Requirements
12/31/2025

Resources by Source	Full Year Amended Budget 2025-26	FYTD Actual @ 12/31/2025	% of 26 Budget	Prior Year FYTD Actual @ 12/31/2024	% of '25 Actual
State School Fund Formula					
State School Fund	\$ 135,603,731	\$ 78,802,635	58.1%	\$ 74,037,001	60.7%
Property Taxes, Penalties & Interest	49,435,000	46,433,366	93.9%	44,284,668	97.2%
Common School Fund	1,961,833	-	0.0%	-	0.0%
Federal Forest Fees	100,000	-	0.0%	-	0.0%
Other State Grants	-	54,050	-	2,340	8.2%
Intermediate -					
SOESD/COUNTY	3,650,000	26,523	0.7%	27,135	0.7%
Interest on Investments	2,634,532	1,189,358	45.1%	1,449,151	40.2%
Juvenile Detention	401,000	198,108	3.8%	-	0.0%
Fees Charged to Grants	1,140,000	43,423	3.8%	67,811	5.6%
Rentals	100,000	30,180	30.2%	20,913	54.9%
Teen Parent Funding	30,000	867	2.9%	5,665	36.8%
Transfers In	550,000	-	0.0%	550,000	100.0%
Other Federal Funding	30,000	31,341	104.5%	54,180	338.9%
Miscellaneous	979,000	578,538	59.1%	466,418	49.6%
	-	-	-	-	-
	-	-	-	-	-
Subtotal Revenue	\$ 196,615,096	\$ 127,388,389	64.8%	\$ 120,965,283	67.2%
Other Income GASB 87/96	1,500,000	-		-	
Beginning Fund Balance	17,802,295	23,058,686		21,279,184	88.2%
Total Resources	\$ 215,917,391	\$ 150,447,075	69.7%	\$ 142,244,467	68.7%
	-	-		-	
	-	-		-	
Uses by Object					
Wages	\$ 83,699,035	\$ 31,883,576	38.1%	\$ 29,549,698	37.9%
Associated Payroll Costs	52,518,260	18,262,352	34.8%	17,584,778	37.8%
Purchased Services	43,550,664	22,142,454	50.8%	20,956,698	50.6%
Supplies & Materials	7,274,330	4,364,218	60.0%	3,914,447	80.3%
Capital Outlay Including GASB 87/96	245,000	170,281	69.5%	131,935	35.6%
Other Objects	1,637,806	1,873,200	114.4%	1,433,387	41.1%
Transfers Out	10,990,000	10,490,000	95.5%	5,985,000	52.0%
Other Financing Uses	\$ 1,500,000	-		-	
Subtotal Expenditures	\$ 201,415,096	\$ 89,186,081	44.3%	\$ 79,555,943	42.3%
Contingency & Unappropriated Fund Balance	\$ 14,502,295	61,260,994		62,688,524	271.9%
Total Uses	\$ 215,917,391	\$ 150,447,075	69.7%	\$ 142,244,467	67.4%
	-	-		-	
	-	-		-	
Beginning Fund Balance	\$ 17,802,295	23,058,686		21,279,184	100.0%
Plus Total Revenue/Other Income	\$ 198,115,096	\$ 127,388,389		\$ 120,965,283	63.7%
Less Total Expenditures ex. Contingencies	\$ 201,415,096	89,186,081		79,555,943	42.3%
Ending Fund Balance Ex. Contingency	\$ 14,502,295	\$ 61,260,994		\$ 62,688,524	
Net Change in Fund Balance	\$ (3,300,000)	\$ 38,202,309		\$ 41,409,340	

Medford School District 549C
General Fund Resources by Object
12/31/2025

Acct	Description	Amended Budget		YTD Actual	YTD % of Budget
		2025-26	Month Actual		
1111	Current Yr. Taxes	48,551,280	\$ 45,134,229	\$ 45,712,467	94.2%
1112	Prior Yr. Taxes	848,720	264,886	684,813	80.7%
1114	Payments in lieu of Property Tax	-	-	-	-
1190	Interest & Penalties on taxes	35,000	6,057	36,086	103.1%
1312	Tuition	-	-	-	-
1510	Interest on Investments	2,634,532	214,665	1,189,358	45.1%
1800	Pre-School	40,000	5,745	31,991	80.0%
1910	Rentals	100,000	3,848	30,180	30.2%
1920	Local Donations	-	-	-	-
1943	Services To Other Districts	40,000	1,886	9,972	24.9%
1960	Recovery of Expenditures	5,000	-	-	0.0%
1970	Services to Other Funds	25,000	13,154	53,635	214.5%
1980	Fees Charged to Grants	1,140,000	-	43,423	3.8%
1990	Miscellaneous revenue	100,000	(2,183)	129,556	129.6%
1991	Payroll reimbursement	35,000	-	500	1.4%
1992	Field Trip reimbursement	15,000	-	16,895	112.6%
1994	P-Card Rebate	75,000	28,481	28,481	38.0%
1995	Music Inst. Rental	8,000	350	13,520	169.0%
1997	Self Pay Health reimb.	533,000	38,006	236,163	44.3%
1999	E-Rate	103,000	-	57,824	56.1%
	Subtotal Local Revenue	54,288,532	\$ 45,709,124.75	\$ 48,274,865	88.9%
2102	SOESD	3,650,000	\$ -	\$ -	0.0%
2199	Other Intermediate Revenue	-	11,492.19	26,523.06	-
	Subtotal Intermediate Revenue	3,650,000	\$ 11,492	\$ 26,523	0.7%
3101	State School Fund	135,603,731	\$ 11,285,670	\$ 78,802,635	58.1%
3103	Common School Fund	1,961,833	-	-	0.0%
3199	State Grants	-	-	-	-
3294	JUV Detention	401,000	198,108.06	198,108	49.4%
3296	Teen Parent	30,000	-	867	2.9%
3299	Other Grants	-	25,750.00	54,050	-
	Subtotal State Revenue	137,996,564	\$ 11,509,528	\$ 79,055,660	57.3%
4500	Federal Revenue	-	\$ -	\$ 26,760	-
4508	Foster Care Transportation	-	-	\$ 2,714	-
4512	Child Care Block Grant	30,000	-	\$ 1,867	6.2%
4801	Federal Forest Fees	100,000	-	-	0.0%
	Subtotal Federal Revenue	130,000	\$ -	\$ 31,341	24.1%
5201	Transfers In	550,000	\$ -	\$ -	0.0%
5300	Sale of Fixed Assets	-	-	-	-
	Total Transfers/Other	550,000	\$ -	\$ -	0.0%
	Total Revenue	196,615,096	\$ 57,230,145	\$ 127,388,389	64.8%
	Other Income/Expense GASB 87/96	1,500,000		\$ -	0.0%
5401	Beginning Fund Balance	17,802,295	23,058,686	23,058,686	129.5%
	Total Resources	215,917,391	\$ 80,288,831	\$ 150,447,075	69.7%

*Medford School District 549C
Expenses By Object
December 31, 2025*

Obj	Description	Budget 2025-26	Month Actual	YTD Actual	YTD Exp % of Budget
111	Certified salaries	\$ 45,680,681	\$ 4,108,344	\$ 16,140,617	35.3%
112	Classified salaries	23,763,054	2,052,417	9,804,193	41.3%
113	Admin salaries	7,026,226	657,914	3,127,021	44.5%
114	Classified Managers	1,668,351	111,958	701,796	42.1%
116	Early Retirement	913,400	30,000	125,500	13.7%
121	Certified subs	23,690	-	-	0.0%
122	Classified subs	117,850	11,529	62,825	53.3%
123	Temp - Certified	1,081,124	28,669	235,444	21.8%
124	Temp - Classified	481,557	1,666	110,835	23.0%
130	Additional Salary	90,000	9,932	69,492	77.2%
140	Overtime - Classified	432,875	42,980	261,157	60.3%
141	X-Comp	1,720,576	185,644	812,637	47.2%
142	Home Instruction	160,611	3,367	8,983	5.6%
144	Insurance Opt Out	539,040	116,672	423,075	78.5%
	Total Salaries	\$ 83,699,035	\$ 7,361,093	\$ 31,883,576	38.1%
210	PERS	25,274,289	4,275,399	9,300,630	36.8%
220	Social Security	5,347,787	449,857	1,926,722	36.0%
221	Medicare	1,250,691	105,792	452,515	36.2%
231	Worker's Comp	394,275	37,751	130,107	33.0%
232	Unemployment Insurance	858,441	7,479	31,980	3.7%
234	Oregon Paid Leave	370,100	29,754	127,360	34.4%
241	Health Insurance	15,651,167	1,341,241	5,316,525	34.0%
242	Life Insurance	143,257	18,027	76,499	53.4%
243	403b ER Contribution	1,238,586	64,895	242,962	19.6%
244	Long Term Disability	236,645	-	-	0.0%
245	FSA Match/HSA Match/HC Opt out	661,400	7,600	375,164	56.7%
246	403B Match	348,510	8,237	38,763	11.1%
270	Retiree Medical	743,112	38,105	243,124	32.7%
	Total Benefits	\$ 52,518,260	\$ 4,308,928	\$ 18,262,352	34.8%
312	Program Improvement	-	-	15,205	
313	Student Services	-	-	440	
315	Management Service	80,000	336	40,101	50.1%
318	Professional Growth	178,220	20,258	73,666	41.3%
319	Prof/Tech Service - Instr.	1,972,528	229,908	772,152	39.1%
321	Cleaning Service	5,800	-	1,936	33.4%
322	Repair and Maintenance	2,569,508	187,603	1,115,174	43.4%
324	Rental	705,000	75,373	451,266	64.0%
325	Electricity	2,163,000	-	865,000	40.0%
326	Natural Gas/Heating Fuel	292,000	805	88,790	30.4%
327	Water/Sewer	859,280	9,636	317,849	37.0%
328	Garbage	316,200	25,105	146,066	46.2%
329	Other Property Service	70,000	612	21,951	31.4%
331	Pupil Transportation	6,707,065	547,990	2,933,640	43.7%
332	Pupil Trans - Other	109,725	3,145	62,669	57.1%
341	Travel - In District	29,639	2,012	8,367	28.2%
342	Travel - Out of District	166,621	8,039	115,607	69.4%
344	Training - In District	-	-	-	
345	Training - Out of District	-	-	-	
351	Telephone	350,000	12,370	179,110	51.2%
353	Postage	47,437	20,191	21,347	45.0%
354	Advertising	56,300	1,356	3,917	7.0%
355	Printing	5,000	-	-	0.0%
360	Charter School	22,010,994	1,713,968	12,414,501	56.4%
371	Tuition Payments	52,600	-	2,799	5.3%
374	Other Tuition Payments	-	-	-	
381	Audit	60,000	-	34,100	56.8%
382	Legal	155,000	11,487	43,891	28.3%
383	Arch/Eng. Svcs	80,000	7,900	10,925	13.7%
384	Negotiations	45,000	-	-	0.0%
388	Elections	20,000	-	-	0.0%
389	Prof/Tech Service	1,500,664	90,961	894,191	59.6%
390	Other General/Prof/Tech Svc	-	-	-	
391	Licensed Substitutes	2,240,473	358,304	987,648	44.1%
392	Classified Substitutes	702,611	163,918	520,146	74.0%
	Total Purchased Services	\$ 43,550,664	\$ 3,491,276	\$ 22,142,454	50.8%

*Medford School District 549C
Expenses By Object
December 31, 2025*

Obj	Description	Budget 2025-26	Month Actual	YTD Actual	YTD Exp % of Budget
410	Supplies/Materials	2,617,386	108,222	982,478	37.5%
412	Student Rewards	-	-	-	
420	Textbooks	267,800	1,624	256,727	95.9%
430	Library Books	141,350	1,576	17,650	12.5%
440	Periodicals	6,784	-	5,652	83.3%
450	Food	-	3,198	67,605	
451	Travel Meals	-	1,163	5,991	
460	Non-Consumable	629,233	68,943	520,157	82.7%
470	Computer Software	2,714,041	65,418	2,263,006	83.4%
471	Accelerated Reader Software	2,165	-	-	0.0%
480	Hardware less than 5K	895,572	10,319	244,952	27.4%
	Total Supplies and Materials	\$ 7,274,330	\$ 260,464	\$ 4,364,218	60.0%
520	Bldgs. Acquisition	-	-	-	
530	Site Improvement	-	-	367	
541	Equipment over 5K	80,000	13	29,653	37.1%
542	Replacement Equipment	165,000	-	140,262	85.0%
550	Technology over 5K	-	-	-	
555	SBITA (GASB 96)	1,200,000	-	-	0.0%
556	Lease (GASB 87)	300,000	-	-	0.0%
	Total Capital Outlay	\$ 1,745,000	\$ 13	\$ 170,281	9.8%
613	Redemption of Principal GASB 87/96	-	-	-	
614	Interest GASB 87/96	-	-	-	
640	Dues/Fees/Memberships	316,746	7,579	192,054	60.6%
651	Liability Insurance	624,890	-	842,130	134.8%
653	Property Insurance	681,170	-	829,830	121.8%
655	Judgements and Settlements	10,000	-	9,186	91.9%
690	Indirect Charges	5,000	-	-	0.0%
	Total Other Objects	\$ 1,637,806	\$ 7,579	\$ 1,873,200	114.4%
790	Interfund Transfers	10,990,000	9,882,300	10,490,000	95.5%
	Total Transfers	\$ 10,990,000	\$ 9,882,300	\$ 10,490,000	95.5%
	Subtotal Expenditures and Transfers	\$ 201,415,096	\$ 26,349,259	\$ 89,186,081	44.3%
810	Contingency & Unappropriated Fund Balance	14,502,295	(2,825,358)	61,260,994	422.4%
	Total General Fund Requirements/Reserves	\$ 215,917,391	\$ 23,523,901	\$ 150,447,075	69.7%
	SPECIAL REVENUE FUND	58,418,635	2,653,848	20,944,082	35.9%
	DEBT SERVICE FUND	20,428,100	1,151,817	10,076,442	49.3%
	CAPITAL PROJECTS FUND	467,099	-	8,033	1.7%
	TRUST FUND	726,595	87,322	188,647	26.0%
	TOTAL USES EXCLUDING STUDENT BODY FUND	\$ 295,957,820	\$ 27,416,887	\$ 181,664,279	61.4%



EXECUTIVE SUMMARY

Meeting Date:	January 15, 2026
Agenda Item:	Medford Education Association (MEA) Report
Item Type:	Informational
Administrator:	Jeanne Grazioli
Objective:	To share employee association perspectives on progress, priorities, and Board support.

Background:

As part of our ongoing commitment to collaboration and open communication, leaders from our employee associations will provide updates to the Board. These short presentations are an opportunity to highlight what's working well, share priorities and progress, and suggest ways the Board can continue to offer meaningful support. This month, representatives from the Medford Education Association (MEA), the teachers' union, will share their perspectives.

Additional Materials: N/A

Recommendation: N/A

Suggested Motion: N/A



EXECUTIVE SUMMARY

Meeting Date:	January 15, 2026
Agenda Item:	Potential Partnership with United Soccer League (USL)
Item Type:	Items for Information & Discussion
Administrator:	Jeanne Grazioli, Brad Earl
Objective:	Provide information on a potential partnership with USL

Background: The [United Soccer League \(USL\)](#) has signed a Letter of Intent with the City of Medford to potentially site a professional soccer team(s) in Medford.

USL is interested in exploring the possibility of utilizing historic Spiegelberg Stadium as an option for their field of play. The league has partnered with other school districts across the country to co-locate professional soccer with already existing public school athletics and activities. In each case, they have transported a professional stadium and game watching experience to the community for high school and professional sports alike. The District is looking forward to expanding talks with city officials, USL leaders, district leaders and our own athletic community to explore this potential partnership.

Additional Materials: None

Recommendation: N/A

Suggested Motion: N/A



EXECUTIVE SUMMARY

Meeting Date:	January 15, 2026
Agenda Item:	School Board Policy (first reading)
Item Type:	Information and Discussion
Administrator:	Chair Kendell Ferguson
Objective:	Review policy as a first reading following updates from 11.20.25 Board meeting

Background:

Periodically, staff or Board members will bring a policy forward for revision/adoption. Included in this packet is policy BBG that was initiated by a Board member. It was reviewed as first readings on October 16, November 6, and November 20 and will be reviewed again as a first reading with additional revisions proposed at the last meeting (in **bright blue** font).

Following the November 20 meeting, the additional revisions to the policy were added by the Board Chair and emailed to OSBA for a legal review. The suggested revisions were implemented to the version provided in this packet.

POLICIES

Policy	Title	Summary
BBG (new policy)	Board Member Concerns About Board Member Behaviors	<p><i>At the September 5 Board Retreat, the Board Chair brought forward a proposed policy for consideration and asked Board members to review it and provide feedback. A request was made for a legal opinion to ensure alignment with Oregon law and protection of Board member rights and due process.</i></p> <p><i>At the September 18 Board meeting the Board Chair acknowledged she did not receive any proposals to change the proposed language, and she shared OSBA's response to the draft policy which she stated would be included in the policy to be presented at the next meeting for review as a first reading.</i></p> <p><i>Following the meeting, Board members provided suggested revisions which have been included in the first reading presented</i></p>

		<p><i>in the policy packet.</i></p> <p><i>At the October 16 meeting, Board members reviewed/discussed the proposed policy and suggested additional revisions which are indicated in green font to Steps 1, 2 and part of Step 3.</i></p> <p><i>At the November 6 meeting, the Board made revisions to Step 3, and agreed to review Step 4 at the November 20 meeting.</i></p> <p><i>Board Director Erik Johnsen provided a draft of Step 4, which is included in the packet and will be part of the discussion.</i></p> <p><i>At the November 20 meeting the Board discussed revisions to Step 4 of the policy, which were added to the attached policy and have been reviewed by OSBA. OSBA's suggestions were implemented into this version.</i></p>
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Additional Materials: [Policy Packet 1.15.26](#)

The policy packet is organized with the revised version first (colored font), followed by a draft final version with the revisions incorporated.

Recommendation: Review the revised language and move the policy forward for a second reading on February 19.

Suggested Motion: *No action required at this meeting.*

Medford School District 549C

Code: BBG - *new policy*
Adopted: xx/xx/xx

Board Member Concerns About Board Member Behaviors

The existence of this special process does not excuse the Board from following the law and/or other existing policies for certain complaints and only applies to Board Member to Board Member complaints, **in such an instance the Board Member should also follow the other existing policies and laws**. Any staff, student or community member would use existing procedures for complaints about a Board Member.

Step 1: One-on-One Communication: If a Board Member believes that another Board Member has violated the Board Norms, Board Code of Ethics, Board Operating Procedures, Board Policy, State or Federal law, **and believes that action should be taken to remedy the violation or avoid a repeat of the violation, then** it is the responsibility of the concerned Board Member to discuss the alleged violation with the other Board Member in private prior to taking any other action, unless the nature of the allegation requires immediate escalation to the Board Chair or legal authorities (for example, if a child is in imminent physical danger at that exact moment). Board members are strongly encouraged to address concerns directly with Board Member in question first, in a one-on-one format. Notably, the Board Member should not first go to other Board Members, social media, or anywhere else other than the Board Member who they believe has committed a violation. The **concerned** Board Member is, however, strongly encouraged to provide a written follow-up after the one-on-one communication or to document that the other Board Member declined to meet one-on-one (which then allows for immediate escalation). One or both Board Members may record the meeting, provided that a copy of the recording shall be provided to other participating Board Members. If recorded, there must be notice to the other Board Member **at the beginning of the meeting because the recording will be a public record**.

- If the Board Member facing allegation is unresponsive to requests to schedule a meeting -- in person, via phone, or via video -- within 7 days of it being requested, the concerned Board Member may proceed to the next step.
- If Board Members have previously completed this step or this is based on an additional infraction **of the Board Norms, Board Code of Ethics, Board Operating Procedures, Board Policy, State or Federal law previously discussed with the Board Member, then** the concerned Board Member may proceed to the next step.
- **Alternatively**, if there are concerns regarding the threat of harm or accuracy of what is said, or if the Board Member is unwilling to have a private conversation with the **other concerned** Board Member, the concerned Board Member may move on to Step 2 **and involve the Board Chair or Board Vice Chair**.

Step 2: Two-on-One Communication: If, after the concerned Board Member has privately discussed the alleged violation with the other Board Member, the concerned Board Member remains unsatisfied that the alleged violation has been addressed, the concerned Board Member may submit, in writing, the allegation to the Board Chair, vice chair, third Board Member, or mutually agreed upon third party outside of district (arbiter). If the Board Chair is involved in the allegation, the concerned Board Member **may instead shall** submit the allegation, in writing, to the Board Vice-Chair, **or the next most senior Board Member not involved in the allegation who is then obligated to serve as arbiter instead** third Board Member, or mutually agreed upon third party outside of district (arbiter).

- The Board Members involved will conference to discuss the alleged violation. All parties are strongly encouraged not to allow any further escalation of these procedures and the arbiter's duty is to work to avoid such escalation.
- If the Board Member facing allegation is unresponsive to requests to schedule a meeting -- in

person, via phone, or via video -- within 7 days, the concerned Board Member may proceed to the next step.

- If Board Members have previously completed this step or this is based on an additional infraction of the Board Norms, Board Code of Ethics, Board Operating Procedures, Board Policy, State or Federal law previously discussed with the Board Member, then the concerned Board Member may proceed to the next step.
- Any Board Member or mutually agreed upon third party outside of district may decline to serve as arbiter. The responsibility of the arbiter is to attempt to resolve the matter through conferencing. If the arbiter is unable to do so, then the concerned Board Member may proceed to the next step.

Step 3: Full Board Communication: If, after the conference, the concerned Board Member remains unsatisfied that the alleged violation has been addressed, the Board Chair will call a special meeting of the Board to discuss the alleged violation.

- If, after the special meeting of the Board to discuss the alleged violation, the Board determines that the allegations are substantiated, the Board should inform the Board Member in question that the allegations have been substantiated and that the Board Member is to refrain from any further such behavior. If the Board believed that Step 3 was sufficient to stop further violations or continued violations, the Board does not need to proceed to Step 4. If the Board believes that Full Board Action is required to stop repeated or continued violations, the Board may proceed to Step 4 during this special meeting.
- ~~If the Board Member facing allegation is unresponsive to email and text requests to schedule a conference -- in person, via phone, or via video -- within 7 days, the concerned Board Member may proceed to the next step.~~
- If Board Members have previously completed this step or this is based on an additional infraction, the concerned Board Member may proceed to the next step.
- If, ~~after the special meeting of the Board to discuss the alleged violation,~~ the Board determines that further investigation is necessary, then the Board Chair may call upon the District's General Counsel to help retain an external legal advisor to investigate the nature of the allegations. The findings of this investigation will be presented at a future special meeting of the Board.

Step 4: Full Board Action: If the allegations are such that action is required to ensure there are no further violations or continued violations, the Board may proceed to this step during the special meeting called for Step 3 rather than scheduling another special meeting at a later date. Alternatively, if the Board believed that Step 3 was sufficient to stop further violations or continued violations, but after the Board Member has been informed that their behavior has been substantiated as being a violation as set forth in Step 3 above, any Board Member is concerned that the behavior has continued after the conclusion of Step 3, the concerned Board Member must ~~bring this concern to~~ notify the Board Chair that the concerned Board Member would like to bring a motion to admonish the other Board Member, and the Board Chair ~~who~~ will call a special meeting of the Board to consider the allegation. During the special meeting, in order for the alleged violation to be considered, one of the following three motions must be made and seconded: a motion to dismiss allegations, a motion to admonish, or a motion to censure.

- In order to protect the overriding principle of freedom of speech, the Board shall not impose admonition or censure on any of its members solely for the exercise of their First Amendment rights. In order to ensure the right to a fair jury trial, the Board shall not impose admonition or censure on any of its members for the violation of any law while civil or criminal charges are pending. However, when the civil or criminal proceedings are final, the Board need not be bound by the conclusions of the Court and may again pursue admonition or censure.

- **Dismissal:** A motion to dismiss allegations concludes these procedures ~~and exonerates~~ against the accused Board Member. Once a motion to dismiss allegations has passed concerning a given alleged violation, no other motions concerning that alleged violation are in order. A motion to dismiss allegations requires a majority vote ~~of the full Board~~ to pass. If there is not a majority vote in favor of the motion, the motion fails.
- **Admonition:** An admonition is a formal warning that the board member's conduct does not conform to the policies of the school district, the board operating agreement, or other standards which are expected of an elected official. Admonishment should include prescriptive guidance to bring the accused board member's conduct in line with board expectations. A motion to admonish must be presented in writing and must contain the exact wording of the alleged violation, the proposed admonition, and corrective action. A copy of the motion to admonish must be provided to the accused Board Member at least seventy-two (72) hours prior to discussion of the motion. A motion to admonish requires a majority vote ~~of the full Board~~ to pass. If there is not a majority vote in favor of the motion, the motion fails.
- **Censure:** A censure is a formal action of the board to declare that the accused board member's conduct does not conform to the policies of the school district, the board operating agreement, or other standards which are expected of an elected official. Actions taken by the board may restrict or revoke privileges of the accused board member as necessary to ensure the safe operations of the school district, and uphold the expectations of board member conduct. A censured board member will retain all rights of an elected official, and any limitations imposed on a censured board member should be necessary to achieve the aims of compliance with expected board member conduct and the functioning of the school district. Restrictions and limitations imposed on a censured board member should be reviewed and reaffirmed on a regular and frequent basis, at least quarterly. A motion to censure must be presented in writing and must contain the exact wording of the alleged violation, the proposed censure, and proposed corrective action ~~such as loss or restriction of privileges~~. A copy of the motion to censure must be provided to the accused Board Member at least seventy-two (72) hours prior to discussion of the motion. A motion to censure requires a 2/3 majority vote ~~of the full Board~~ to pass. If there is not a 2/3 majority vote in favor of the motion, then the motion fails. If the motion fails, a motion for Admonition may be made.
- **Privileges:** All privileges that have been extended to the Censured Board Member may be revoked and revoked privileges must remain revoked until the censure is lifted. This in no way harms or alters the statutory rights of an elected official — to be in meetings, to participate/vote, and to make ~~special~~ public information requests (PIR) as provided by law. Anything that is not a statutorily protected right of elected officials, however, may be revoked. Privileges that may be revoked include, but are not limited to, officer roles, committee roles, access to district staff, access to district facilities, access to district events, access to district athletics, access to district graduation, approval of board member travel, and access to any requests not covered by special PIR rights. In effect, ~~they~~ Censured Board Member will have the same privileges that a member of the general public would have with respect to the privileges that have been revoked and may meet with district staff, access district facilities, access district events, access district athletics, and/or access district graduation in the same manner as any other member of the general public, but will not receive any special board member access.

If a motion for censure is made and fails, then a motion for admonition is made and also fails, the matter shall be dismissed.

Medford School District 549C

Code: BBG - new policy

Adopted: xx/xx/xx

Board Member Concerns About Board Member Behaviors

The existence of this special process does not excuse the Board from following the law and/or other existing policies for certain complaints and only applies to Board Member to Board Member complaints, in such an instance the Board Member should also follow the other existing policies and laws. Any staff, student or community member would use existing procedures for complaints about a Board Member.

Step 1: One-on-One Communication: If a Board Member believes that another Board Member has violated the Board Norms, Board Code of Ethics, Board Operating Procedures, Board Policy, State or Federal law, and believes that action should be taken to remedy the violation or avoid a repeat of the violation, then it is the responsibility of the concerned Board Member to discuss the alleged violation with the other Board Member in private prior to taking any other action, unless the nature of the allegation requires immediate escalation to the Board Chair or legal authorities (for example, if a child is in imminent physical danger at that exact moment). Board members are strongly encouraged to address concerns directly with Board Member in question first, in a one-on-one format. Notably, the Board Member should not first go to other Board Members, social media, or anywhere else other than the Board Member who they believe has committed a violation. The concerned Board Member is, however, strongly encouraged to provide a written follow-up after the one-on-one communication or to document that the other Board Member declined to meet one-on-one (which then allows for immediate escalation). One or both Board Members may record the meeting, provided that a copy of the recording shall be provided to other participating Board Members. If recorded, there must be notice to the other Board Member at the beginning of the meeting because the recording will be a public record.

- If the Board Member facing allegation is unresponsive to requests to schedule a meeting -- in person, via phone, or via video -- within 7 days of it being requested, the concerned Board Member may proceed to the next step.
- If Board Members have previously completed this step or this is based on an additional infraction of the Board Norms, Board Code of Ethics, Board Operating Procedures, Board Policy, State or Federal law previously discussed with the Board Member, then the concerned Board Member may proceed to the next step.
- Alternatively, if there are concerns regarding the threat of harm or accuracy of what is said, or if the Board Member is unwilling to have a private conversation with the concerned Board Member, the concerned Board Member may move on to Step 2.

Step 2: Two-on-One Communication: If, after the concerned Board Member has privately discussed the alleged violation with the other Board Member, the concerned Board Member remains unsatisfied that the alleged violation has been addressed, the concerned Board Member may submit, in writing, the allegation to the Board Chair, vice chair, third Board Member, or mutually agreed upon third party outside of district (arbiter). If the Board Chair is involved in the allegation, the concerned Board Member shall submit the allegation, in writing, to the Board Vice-Chair, third Board Member, or mutually agreed upon third party outside of district (arbiter).

- The Board Members involved will conference to discuss the alleged violation. All parties are strongly encouraged not to allow any further escalation of these procedures and the arbiter's duty is to work to avoid such escalation.
- If the Board Member facing allegation is unresponsive to requests to schedule a meeting -- in person, via phone, or via video -- within 7 days, the concerned Board Member may proceed to the

next step.

- If Board Members have previously completed this step or this is based on an additional infraction of the Board Norms, Board Code of Ethics, Board Operating Procedures, Board Policy, State or Federal law previously discussed with the Board Member, then the concerned Board Member may proceed to the next step.
- Any Board Member or mutually agreed upon third party outside of district may decline to serve as arbiter. The responsibility of the arbiter is to attempt to resolve the matter through conferencing. If the arbiter is unable to do so, then the concerned Board Member may proceed to the next step.

Step 3: Full Board Communication: If, after the conference, the concerned Board Member remains unsatisfied that the alleged violation has been addressed, the Board Chair will call a special meeting of the Board to discuss the alleged violation.

- If, after the special meeting of the Board to discuss the alleged violation, the Board determines that the allegations are substantiated, the Board should inform the Board Member in question that the allegations have been substantiated and that the Board Member is to refrain from any further such behavior. If the Board believed that Step 3 was sufficient to stop further violations or continued violations, the Board does not need to proceed to Step 4. If the Board believes that Full Board Action is required to stop repeated or continued violations, the Board may proceed to Step 4 during this special meeting.
- If Board Members have previously completed this step or this is based on an additional infraction, the concerned Board Member may proceed to the next step.
- If the Board determines that further investigation is necessary, then the Board Chair may call upon the District's General Counsel to help retain an external advisor to investigate the nature of the allegations. The findings of this investigation will be presented at a future special meeting of the Board.

Step 4: Full Board Action: If the allegations are such that action is required to ensure there are no further violations or continued violations, the Board may proceed to this step during the special meeting called for Step 3 rather than scheduling another special meeting at a later date. Alternatively, if the Board believed that Step 3 was sufficient to stop further violations or continued violations, but after the Board Member has been informed that their behavior has been substantiated as being a violation as set forth in Step 3 above, any Board Member is concerned that the behavior has continued after the conclusion of Step 3, the concerned Board Member must notify the Board Chair that the concerned Board Member would like to bring a motion to admonish the other Board Member, and the Board Chair will call a special meeting of the Board to consider the allegation. During the special meeting, in order for the alleged violation to be considered, one of the following three motions must be made and seconded: a motion to dismiss allegations, a motion to admonish, or a motion to censure.

- In order to protect the overriding principle of freedom of speech, the Board shall not impose admonition or censure on any of its members solely for the exercise of their First Amendment rights. In order to ensure the right to a fair jury trial, the Board shall not impose admonition or censure on any of its members for the violation of any law while civil or criminal charges are pending. However, when the civil or criminal proceedings are final, the Board need not be bound by the conclusions of the Court and may again pursue admonition or censure.
- **Dismissal:** A motion to dismiss allegations concludes these procedures against the accused Board Member. Once a motion to dismiss allegations has passed concerning a given alleged violation, no other motions concerning that alleged violation are in order. A motion to dismiss allegations requires a

majority vote of the full Board to pass. If there is not a majority vote in favor of the motion, the motion fails.

- **Admonition:** An admonition is a formal warning that the board member's conduct does not conform to the policies of the school district, the board operating agreement, or other standards which are expected of an elected official. Admonishment should include prescriptive guidance to bring the accused board member's conduct in line with board expectations. A motion to admonish must be presented in writing and must contain the exact wording of the alleged violation, the proposed admonition, and corrective action. A copy of the motion to admonish must be provided to the accused Board Member at least seventy-two (72) hours prior to discussion of the motion. A motion to admonish requires a majority vote of the full Board to pass. If there is not a majority vote in favor of the motion, the motion fails.
- **Censure:** A censure is a formal action of the board to declare that the accused board member's conduct does not conform to the policies of the school district, the board operating agreement, or other standards which are expected of an elected official. Actions taken by the board may restrict or revoke privileges of the accused board member as necessary to ensure the safe operations of the school district, and uphold the expectations of board member conduct. A censured board member will retain all rights of an elected official, and any limitations imposed on a censured board member should be necessary to achieve the aims of compliance with expected board member conduct and the functioning of the school district. Restrictions and limitations imposed on a censured board member should be reviewed and reaffirmed on a regular and frequent basis, at least quarterly. A motion to censure must be presented in writing and must contain the exact wording of the alleged violation, the proposed censure, and proposed corrective action such as loss or restriction of privileges. A copy of the motion to censure must be provided to the accused Board Member at least seventy-two (72) hours prior to discussion of the motion. A motion to censure requires a 2/3 majority vote of the full Board to pass. If there is not a 2/3 majority vote in favor of the motion, then the motion fails. If the motion fails, a motion for Admonition may be made.
- **Privileges:** All privileges that have been extended to the Censured Board Member may be revoked and revoked privileges must remain revoked until the censure is lifted. This in no way harms or alters the statutory rights of an elected official — to be in meetings, to participate/vote, and to make public information requests (PIR) as provided by law. Anything that is not a statutorily protected right of elected officials, however, may be revoked. Privileges that may be revoked include, but are not limited to, officer roles, committee roles, access to district staff, access to district facilities, access to district events, access to district athletics, access to district graduation, approval of board member travel, and access to any requests not covered by special PIR rights. In effect, the Censured Board Member will have the same privileges that a member of the general public would have with respect to the privileges that have been revoked and may meet with district staff, access district facilities, access district events, access district athletics, and/or access district graduation in the same manner as any other member of the general public, but will not receive any special board member access.

If a motion for censure is made and fails, then a motion for admonition is made and also fails, the matter shall be dismissed.

EXECUTIVE SUMMARY

Meeting Date:	January 15, 2025
Agenda Item:	Appoint Budget Committee Members
Item Type:	Action
Administrator:	Brad Earl, Jodi Fahy
Objective:	Appoint Budget Committee applicants to vacant positions

Background: The Budget Committee consists of seven members appointed by the Board plus the elected Board members. To be eligible for appointment, the appointive member must: 1) live and be registered to vote in the district; and 2) not be an officer, agent or employee of the district. No budget committee member may receive any type of compensation from the district. At the first regular meeting in January, the Board will appoint persons to fill the vacant positions.

The Board received two applications, meeting policy criteria, to fill the two vacant positions.

- Applicant Casey Stine previously served on the budget committee Position 3. Staff recommends reappointing Casey to this position.
- Applicant Christy Clark served as the co-chair of the Middle School Attendance Zone Committee when we added Oakdale Middle School. She has served in other advisory roles for district administration over the past several years. Staff recommends appointing Christy to Position 4.

Additional Materials: [Budget Committee Applications](#) and [Budget Committee Members List](#)

Recommendation: Formally appoint applicants to the Budget Committee.

Suggested Motion: *“I move to reappoint Casey Stine to Budget Committee Position 3, term ending June 30, 2028; and Christy Clark to Budget Committee Position 4, term ending June 30, 2028.*

Candidate Application for Budget Committee

Medford School District 549C - Jackson County, Oregon

Per [Board Policy DBEA](#), to be eligible for appointment, the appointive member must: *

- a. Live and be registered to vote in the district; and
- b. Not be an officer, agent or employee of the district.

Are you eligible for appointment?

Yes

No

Other:

Name *

Casey Stine

Address *

[Redacted]

Resident Telephone *

[Redacted]

Email *

[REDACTED]

Place of Business *

Maslow Project

Occupation or Title *

Case Manager

Business Address

Business Telephone

How long have you been an Oregon resident? *

12 years

How long have you lived within the Medford School District attendance area? *

12 years

Why do you wish to serve on the budget committee? *

I wish to continue my service on the budget committee because I believe I bring a perspective of a parent, and someone that brings a community focus to the committee.

What interests and concerns do you have regarding Medford School District schools? *

I have a focus on early childhood learning along with the work done with those students that have needs outside of the classroom.

Please list any previous or present community involvement such as board member, budget committee, citizens' committee, or any related skills, talents, or experiences. *

I have been a budget committee member since 2017, I believe.

**By signing this statement, if appointed by the School Board, I agree to serve as a member of the budget committee and adhere to the policies of the district.

Signature *

Casey Stine

This form was created inside of Medford School District 549C.



Candidate Application for Budget Committee

Medford School District 549C - Jackson County, Oregon

Per [Board Policy DBEA](#), to be eligible for appointment, the appointive member must: *

- a. Live and be registered to vote in the district; and
- b. Not be an officer, agent or employee of the district.

Are you eligible for appointment?

Yes

No

Other:

Name *

Christy Clark

Address *

.....

Resident Telephone *

.....

Email *

[REDACTED]

Place of Business *

stay at home mother

Occupation or Title *

stay at home mother

Business Address

Business Telephone

How long have you been an Oregon resident? *

8 years

How long have you lived within the Medford School District attendance area? *

8 years

Why do you wish to serve on the budget committee? *

I'm interested in serving because I believe our schools thrive when engaged and reasonable community members get involved. I hope to support a budget process that is transparent, respectful, and student-focused.

What interests and concerns do you have regarding Medford School District schools? *

I'm interested in the Medford School District because my children attend these schools, and I care about the well-being of our community. I want to help ensure our resources are used wisely, especially as we face both past budget contention and significant upcoming state funding cuts. My goal is to support a thoughtful and respectful process that keeps students and teachers at the center of every decision.

Please list any previous or present community involvement such as board member, budget committee, citizens' committee, or any related skills, talents, or experiences. *

Previously, I was the chairman of the committee for the zoning process of Oakdale Middle School. I presented the final recommendation to the board that is serving as the current boundaries for all schools.

**By signing this statement, if appointed by the School Board, I agree to serve as a member of the budget committee and adhere to the policies of the district.

Signature *

Christy Clark

This form was created inside of Medford School District 549C.





Budget Committee Members (3 year term)

Position 1 Lupe Murillo	Term Expires:	06/30/2027
Position 2 Amanda Olson	Term Expires:	06/30/2027
Position 3 Vacant	Term Expired:	06/30/2028
Position 4 Vacant	Term Expired:	06/30/2028
Position 5 Ilex Brandenberger	Term Expires:	06/30/2026
Position 6 Kaylee Fugate	Term Expires:	06/30/2026
Position 7 Brooke Lazzari	Term Expires:	06/30/2026



EXECUTIVE SUMMARY

Meeting Date:	January 15, 2026
Agenda Item:	Budget Amendment #1-2025-26
Item Type:	Action
Administrator:	Jeanne Grazioli, Brad Earl
Objective:	Review and Approve Budget Amendment #1-2025-26

Background: The adopted budget is built on a series of assumptions around both estimated revenues and expenses. When actual events vary from those assumptions, it sometimes becomes necessary to amend the budget by increasing or decreasing appropriations or to transfer appropriation authority from one fund to another or between appropriation categories within the same fund. A transfer of appropriation authority is a decrease of one existing appropriation and a corresponding increase of another existing appropriation, with no net change in the amount of all appropriations (ORS 294.450).

For the 2025-26 budget, the net result of the first set of recommended amendments across all funds is summarized on the last page of this memo.

The 2025-26 year-end Adopted Budget General Fund Budget deficit spending of \$3.30 million is being increased by \$1.458 million to \$4.758 million in this amendment due to the one-time addition of \$0.25 million of costs in amendment #1c to relocate district office staff from the leased Biddle Road site to other District owned sites and \$1.208 million in costs in amendment #1d for wood beam inspections, construction drawings and some repairs. The District expects \$0.25 million annual lease savings starting in 2026-27 from the staff relocation. Amendments #1E through #1P have a net zero impact to General Fund Contingency/Reserves. Year-end fund balance for the General Fund is projected to be \$18.3 million or approximately 9.2%.

	<u>FY 2025-26 General Fund Budget</u>		
	<u>Adopted</u>	<u>Amended #1</u>	<u>Change</u>
Beginning Balance	\$ 17,802,295	\$ 23,058,686	\$ 5,256,391
Budget Surplus/<Deficit>	<\$3,300,000>	<\$4,758,000>	\$ < 1,458,000>
Ending Fund Balance	\$14,502,295	\$18,300,686	\$ 3,798,391

A spreadsheet roadmap is attached detailing all the proposed changes to various fund types.

I recommend the Board approve the following set of amendments.

Amendment #1A – Amendment to modify 2025-26 Beginning Fund Balances and Contingency/Reserves up \$9.38 million to match 2024-25 audited financial results.

This amendment modifies the budgeted beginning fund balance for all fund types based on audited results as of 06/30/25. On a consolidated basis across all fund types, beginning fund balance and Contingency/Reserves are being increased by \$9.38 million. The increases by fund type are as follows: General Fund \$5.25 million, Special Revenue \$3.93 million, Capital Projects \$0.07 million, Trust and Agency \$0.14 million partially offset by Debt Service down \$0.01 million.

The General Fund was favorable \$5.25 million to budget, resulting in a net \$1.78 million increase in fund balance. The favorable result to budget was driven by a combination of \$1.885 million or 1.0% favorable revenue and \$3.365 million or 1.8% underspending. The \$1.885 million favorable revenue was primarily driven by the combination of local sources favorable \$0.80 million or 1.5% (favorable property tax, indirect grant charges and other misc.), intermediate resources favorable \$0.10 million or 3.2% due to underspending on choice & equity services with SOESD, state sources favorable \$0.75 million or 0.5% due primarily driven by a higher high cost SPED reimbursement driven by higher costs and other financing sources over \$0.22 million due to GASB 87/96. The GASB 87/96 variance in revenue was offset by the same increase in expense, GASB 87/96 entries in total have no net impact on fund balance. (GASB 87/96 is accounting for leases and subscription-based information technology arrangements.) Spending was under \$3.365 million primarily driven by an almost evenly split between Instruction under \$1.78 million or 1.6% and Support Services under \$1.81 million or 2.6% partially offset by Facilities Acquisition and Development being over budget \$0.22 million. These variances were primarily driven by staffing vacancies and to a lesser extent savings on supplies and services.

The Special Revenue fund was \$3.93 million favorable. The primary driver of underspending was on capital projects that did not get finished by 06/30/2025, most of which are being rolled over and re-appropriated in 2025-26 in amendment #1B. The largest project not completed was the \$2.5 million IA renovation which was mostly completed in July-September.

The remaining \$0.195 million favorable beginning fund balances are spread across Trust and Agency \$0.139 million and Capital Projects fund \$0.070 million partially offset by Debt Service down \$0.014 million.

Amendment #1B – Amendment to re-appropriate timing of Special Revenue Fund spending and receipts from prior year. Increase State sources \$0.45 million, increase Facilities Acquisition & Construction \$3.05 million, increase Instruction Expense \$0.45 million and decrease Contingency \$3.05 million.

This amendment primarily re-appropriates capital projects funded but not completed in 2024-25. Some of the larger projects include: Innovation Academy \$2.46 million, security work at McLoughlin, Abraham Lincoln and Kennedy \$0.265 million, emergency generator at Hoover \$0.18 million and various fencing and concrete repair projects \$0.1 million. This amendment also reflects some summer school grant spending and offsetting revenue of \$0.45 million.

Amendment #1C – Amendment to fund one-time Biddle road district office relocation costs. In the General Fund, increase Transfers out to Other Funds and decrease Contingency \$0.25 million. In the Special Revenue Fund increase Transfers in from Other Funds and Facilities Acquisition and Construction \$0.25 million.

This amendment funds limited build out work at various district owned locations where Biddle road district office personnel are being relocated. The district plans to end the Biddle lease at the end of this fiscal year resulting in \$0.25 million annual lease cost savings moving forward starting with the 2026-27 fiscal year.

Amendment #1D – In the General Fund - Amendment to increase Transfers out to Other Funds \$1.208 million and decrease Contingency \$1.208 million. In the Special Revenue Fund increase Transfers in from Other Funds 1.208 million and increase Facility acquisition/construction \$1.208 million.

After multiple buildings with wood beamed roof supports collapsed in Oregon School districts, re-insurance companies threatened to cancel coverage of buildings that had wood beams of a certain type and age. A compromise was reached to maintain re-insurance coverage whereby schools agreed to inspect and repair, if necessary, all of their wood beam ceilings. The district is about 25% complete with the evaluation process. This amendment is for engineering fees to perform inspections \$0.1 million, construction drawings for repairs identified \$0.108 million and repairs at various sites identified so far of \$1.00 million. As the inspection process continues, we expect to find additional repair needs and we expect to come back for approval to effect additional repairs in the \$2.4-\$3.6 million dollar range over the next 12-24 months. If identified wood beam repairs are not made, insurance will not cover a roof collapse similar to what happened at North Medford High School. This is a statewide issue, a small state grant for engineering assessment (\$10K-\$25K) is available and the District is applying for that grant. District leadership is also in contact with legislators to ask the legislature to consider construction/repair grants.

The following 2025-26 budget amendments #1E-#1O results in a combined zero dollar change to General Fund Contingency/Fund Balance.

Amendment #1E – General Fund amendment to reflect higher state and local revenue. Increase other local sources \$0.10 million, increase state sources \$0.10 million and increase Contingency \$0.2 million.

This amendment reflects slightly higher other local source and increased state sources. The state source increase is primarily driven by a higher Juvenile Detention (JDEP) state grant.

Amendment #1F – General Fund Amendment to increase Current year property tax and decrease state sources \$1.0 million. This amendment has no impact to total revenue.

This amendment increases the forecast for local property tax based on the November 2025 levy and decreases the state school fund (SSF) based on the SSF funding formula. In theory, the District will get a net pick up of about \$24.5K as our share of the shared property tax statewide, but we are leaving it as zero for now due to many districts making changes to property tax forecasts with most of them being negative.

Amendment #1G – General Fund Amendment to decrease Instruction expense and increase Contingency \$1.0 million.

This amendment reflects lower overall charter school enrollment and thus lower related pass through to charter schools.

Amendment #1H – General Fund Amendment to increase Instruction expense and decrease Contingency \$0.25 million.

This amendment reflects the addition of 3.0 Licensed FTE over the adopted budget to reduce blended classes at the Elementary level.

Amendment #1I – In the General Fund - Amendment to increase Instruction expense and decrease Contingency \$0.715 million. In the Special Revenue Fund – Amendment to decrease State sources \$0.455 million, decrease Federal Sources \$0.26 million and decrease instruction expense \$0.715 million.

This amendment reflects lower than budgeted grant awards for Student Investment Act, High School Success and IDEA.

Amendment #1J – In the General Fund - Amendment to increase Instruction expense \$0.70 million, decrease Support Services expense \$0.67 million and decrease Contingency \$0.03 million.

This amendment reflects the results of the annual staffing reconciliation during October/November comparing actual staffing and associated payroll costs to the Adopted Budget which was developed in the prior spring. The net impact of this adjustment is a reduction in Contingency of \$30K.

It should be noted, there were 25 vacant budgeted positions at the time of the November reconciliation with a total annual cost of \$1.78 million that are included in the budget. Thus, we would expect the District to be under budget for salaries and associated payroll costs at fiscal year-end some amount due to vacancies. The amount of underspending at year end will depend on how many positions stay vacant and how long they are vacant.

Amendment #1K – In the General Fund - Amendment to increase Support Service expense \$0.37 million and decrease Contingency \$0.37 million reflecting higher insurance costs.

This amendment reflects \$0.149 million higher property insurance costs driven primarily by large claims from Medford and Bend School Districts and \$0.217 million higher liability insurance costs primarily due to the combination of higher Cyber fraud claims in Oregon, higher liability claims, the lifting of the statute of limitations on most liability claims, and the way some judges are adjudicating liability claim settlements.

Amendment #1L – In the General Fund - Amendment to decrease Transfers out to other funds \$0.50 million and increase Contingency \$0.50 million. In the Special Revenue Fund, decrease Transfers in from other funds \$0.5 million and decrease Instruction expense \$0.5 million.

This amendment reflects a revised lower estimate for total Math Curriculum adoption from \$3.0 million to \$2.5 million for this fiscal year.

Amendment #1M – In the General Fund - Amendment to increase Instruction expense and decrease Contingency \$0.03 million.

This amendment reflects the cost of the portion of last year’s music instrument order that did not arrive until after 06/30/2025.

Amendment #1N – In the General Fund - Amendment to increase Support Service expense and decrease Contingency \$0.13 million.

This amendment funds the replacement of two 28 year old passenger vans.

Amendment #1O – In the General Fund - Amendment to increase Support Service expense and decrease Contingency \$0.08 million.

This amendment funds some ADA accommodations at Wilson Elementary and evacuation chairs at multiple locations that have an elevator. The evacuation chairs are used to help students with disabilities evacuate second floor sites in case of a power outage.

Amendment #1P – In the General Fund - Amendment to increase State Sources \$0.23 million, increase Support Service expense \$0.33 million and decrease Contingency \$0.10 million.

This amendment funds increased transportation costs due to increased service levels driven by higher staffing levels. In 2020 staffing levels dropped from 99 drivers to 49 drivers. Since that time staffing has been building back up towards pre-pandemic levels reaching 98 drivers as of December 2025. Please remember, home to school transportation is reimbursed 70% as part of the state school fund transportation grant.

By approving this Budget Amendment the Board is authorizing amendments and appropriation transfers for the Medford School District’s 2025-26 budget in the following amounts:

General Fund – Increase Beginning Fund Balance \$5,256,391, increase Property Taxes \$1,000,000, increase Other local sources \$100,000, decrease State sources \$669,684, increase Instruction expense \$691,877, increase Support Service expense \$238,438, increase Transfers out to other funds \$958,000 and increase Contingency \$3,798,391.

Special Revenue Fund – Increase Beginning Fund Balance \$3,929,912, decrease State sources \$5,311 decrease Federal sources \$260,000 and increase transfers in from other funds \$958,000. Decrease Instruction expense \$765,311, increase Facilities Acquisition/Construction \$4,508,000 and increase Contingency \$879,912.

Debt Service Fund – Decrease Beginning Fund Balance and Contingency \$14,293.

Capital Projects Fund – Increase Beginning Fund Balance and Contingency \$70,218.

Trust and Agency – Increase Beginning Fund Balance and Contingency \$139,272.

Additional Materials: [Budget Amendment Roadmap](#)

Recommendation: Recommending approval of the proposed budget amendment.

Suggested Motion: *“I move to approve Budget Amendment #1-2025-26 as presented.”*

FY25-26 Budget Amendment #1
 Medford School District 549C
 January 15, 2026

	1A	1B	1C	1D	1E	1F	1G	1H	1I	1J	1K	1L	1M	1N	1O	1P			
	Beginning Fund Balance True Up	Reappropriate Special Revenue Project Reserves Projects Carried Over from Prior Year	One-Time District Office Moving Costs	Wood Beam Inspections & Repair sketches & some repairs	Revised revenue forecast	Property Tax/SSF Forecast Update	Lower Charter School Enrollment/Pass Through	Add 3.0 Licensed FTE Elementary to reduce blended grade classes	SIA, HSS and IDEA Grant Reductions from Adopted Budget Amounts	Staffing Reconciliation Estimates vs Actual Wages and Other Associated Payroll costs	Higher Property, Cyber and Liability Insurance Costs	Reduce 2025-26 Math Curriculum Transfer From \$3.0M to \$2.5M	Re-appropriate Music Instrument Purchases That were not delivered by 06/30/2025	Replace Two 28 year old passenger vans	ADA Accommodation and Second Floor Evacuation Chairs	Higher Transportation Costs	Total Amendment #1	FY 25-26 Amended Budget	
General Fund																			
Resources																			
Beginning Fund Balance	17,802,295	5,256,391																5,256,391	23,058,686
Current Year Property Taxes	48,551,280								1,000,000									1,000,000	49,551,280
Other Local Sources	5,737,253				100,000													100,000	5,837,253
Intermediate Sources	3,650,000																		3,650,000
State Sources	137,996,564				100,316	(1,000,000)												(669,684)	137,326,880
Federal Sources	130,000															230,000			130,000
Transfers In/Other Sources	2,050,000																		2,050,000
All Other Budget Resources	-																		-
Total Resources	215,917,392	5,256,391			200,316											230,000		5,686,707	221,604,099
Requirements																			
Instruction	118,088,575						(1,000,000)	250,000	715,311	696,566			30,000					691,877	118,780,453
Support Services	70,836,521									(666,463)	365,901			130,000	79,000	330,000		238,438	71,074,960
Community Service																			-
Facilities Acquisition/Construction	1,500,000																		1,500,000
Other Uses - Debt Service																			-
Other Uses - Transfers Out	10,990,000		250,000	1,208,000								(500,000)						958,000	11,948,000
Contingency	14,502,295	5,256,391	(250,000)	(1,208,000)	200,316		1,000,000	(250,000)	(715,311)	(30,104)	(365,901)	500,000	(30,000)	(130,000)	(79,000)	(100,000)	3,798,391	18,300,686	
Unappropriated Fund Balance & Reserves																			-
Total Requirements	215,917,392	5,256,391			200,316											230,000		5,686,707	221,604,099

FY25-26 Budget Amendment #1
 Medford School District 549C
 January 15, 2026

	1A	1B	1C	1D	1E	1F	1G	1H	1I	1J	1K	1L	1M	1N	1O	1P			
	FY25-26 Adopted Budget	Beginning Fund Balance True Up	Reappropriate Special Revenue Project Reserves Projects Carried Over from Prior Year	One-Time District Office Moving Costs	Wood Beam Inspections & Repair sketches & some repairs	Revised revenue forecast	Property Tax/SSF Forecast Update	Lower Charter School Enrollment/Pass Through	Add 3.0 Licensed FTE Elementary to reduce blended grade classes	SIA, HSS and IDEA Grant Reductions from Adopted Budget Amounts	Staffing Reconciliation Estimates vs Actual Wages and Other Associated Payroll costs	Higher Property, Cyber and Liability Insurance Costs	Reduce 2025-26 Math Curriculum Transfer From \$3.0M to \$2.5M	Re-appropriate Music Instrument Purchases That were not delivered by 06/30/2025	Replace Two 28 year old passenger vans	ADA Accommodation and Second Floor Evacuation Chairs	Higher Transportation Costs	Total Amendment #1	FY 25-26 Amended Budget
Special Revenue Fund																			
Resources																			
Beginning Fund Balance	7,065,477	3,929,912																3,929,912	10,995,389
Current Year Property Taxes	-																	-	-
Other Local Sources	2,365,486																	-	2,365,486
Intermediate Sources	11,330																	-	11,330
State Sources	24,443,476		450,000							(455,311)								(5,311)	24,438,165
Federal Sources	14,712,866									(260,000)								(260,000)	14,452,866
Transfer In	9,820,000			250,000	1,208,000							(500,000)						958,000	10,778,000
Total Resources	58,418,635	3,929,912	450,000	250,000	1,208,000					(715,311)			(500,000)					4,622,601	63,041,236
Requirements																			
Instruction	27,319,381		450,000	-						(715,311)			(500,000)					(765,311)	26,554,070
Support Services	7,836,393		-															-	7,836,393
Community Services	7,546,176																	-	7,546,176
Facilities Acquisition/Construction	8,775,999		3,050,000	250,000	1,208,000													4,508,000	13,283,999
Other Uses - Debt Service	-																	-	-
Other Uses: Transfers Out	550,000																	-	550,000
Contingency	5,954,148	3,929,912	(3,050,000)	-														879,912	6,834,060
Unappropriated Fund Balance & Reserves	436,537																	-	436,537
Total Requirements	58,418,635	3,929,912	450,000	250,000	1,208,000					(715,311)			(500,000)					4,622,601	63,041,236

FY25-26 Budget Amendment #1
 Medford School District 549C
 January 15, 2026

	1A	1B	1C	1D	1E	1F	1G	1H	1I	1J	1K	1L	1M	1N	1O	1P				
	FY25-26 Adopted Budget	Beginning Fund Balance True Up	Reappropriate Special Revenue Project Reserves Projects Carried Over from Prior Year	One-Time District Office Moving Costs	Wood Beam Inspections & Repair sketches & some repairs	Revised revenue forecast	Property Tax/SSF Forecast Update	Lower Charter School Enrollment/Pass Through	Add 3.0 Licensed FTE Elementary to reduce blended grade classes	SIA, HSS and IDEA Grant Reductions from Adopted Budget Amounts	Staffing Reconciliation Estimates vs Actual Wages and Other Associated Payroll costs	Higher Property, Cyber and Liability Insurance Costs	Reduce 2025-26 Math Curriculum Transfer From \$3.0M to \$2.5M	Re-appropriate Music Instrument Purchases That were not delivered by 06/30/2025	Replace Two 28 year old passenger vans	ADA Accommodation and Second Floor Evacuation Chairs	Higher Transportation Costs	Total Amendment #1	FY 25-26 Amended Budget	
Debt Service Fund																				
Resources																				
Beginning Fund Balance	1,412,625	(14,293)																(14,293)	1,398,331	
Current Year Property Taxes	12,430,475																	-	12,430,475	
Other Local Sources	5,415,000																	-	5,415,000	
Intermediate Sources	-																	-	-	
State Sources	-																	-	-	
Federal Sources	-																	-	-	
Transfer In	1,170,000																	-	1,170,000	
All Other Budget Resources	-																	-	-	
Total Resources	20,428,100	(14,293)		-	-			-		-	-	-	-	-	-	-	-	(14,293)	20,413,806	
Requirements																				
Instruction	-																		-	-
Support Services	-																		-	-
Community Services	-																		-	-
Facilities Acquisition/Construction	-																		-	-
Other Uses - Debt Service	19,173,860																		-	19,173,860
Other Uses: Transfers Out	-																		-	-
Contingency	1,254,240	(14,293)																(14,293)	1,239,946	
Unappropriated Fund Balance & Reserves	-																	-	-	
Total Requirements	20,428,100	(14,293)		-	-			-		-	-	-	-	-	-	-	-	(14,293)	20,413,806	

FY25-26 Budget Amendment #1
 Medford School District 549C
 January 15, 2026

	1A	1B	1C	1D	1E	1F	1G	1H	1I	1J	1K	1L	1M	1N	1O	1P			
	FY25-26 Adopted Budget	Beginning Fund Balance True Up	Reappropriate Special Revenue Project Reserves Projects Carried Over from Prior Year	One-Time District Office Moving Costs	Wood Beam Inspections & Repair sketches & some repairs	Revised revenue forecast	Property Tax/SSF Forecast Update	Lower Charter School Enrollment/Pass Through	Add 3.0 Licensed FTE Elementary to reduce blended grade classes	SIA, HSS and IDEA Grant Reductions from Adopted Budget Amounts	Staffing Reconciliation Estimates vs Actual Wages and Other Associated Payroll costs	Higher Property, Cyber and Liability Insurance Costs	Reduce 2025-26 Math Curriculum Transfer From \$3.0M to \$2.5M	Re-appropriate Music Instrument Purchases That were not delivered by 06/30/2025	Replace Two 28 year old passenger vans	ADA Accommodation and Second Floor Evacuation Chairs	Higher Transportation Costs	Total Amendment #1	FY 25-26 Amended Budget
Capital Projects Fund																			
Resources																			
Beginning Fund Balance	435,099	70,218																70,218	505,318
Current Year Property Taxes																		-	-
Other Local Sources	32,000																	-	32,000
Intermediate Sources																		-	-
State Sources																		-	-
Federal Sources																		-	-
Transfers In																		-	-
All Other Budget Resources																		-	-
Total Resources	467,099	70,218		-	-			-		-	-	-	-	-		-	-	70,218	537,318
Requirements																			
Instruction																		-	-
Support Services																		-	-
Community Services																		-	-
Facilities Acquisition & Construction	350,000																	-	350,000
Other Uses - Debt Service																		-	-
Other Uses: Transfers Out																		-	-
Contingency	117,099	70,218																70,218	187,318
Unappropriated Fund Balance & Reserves																		-	-
Total Requirements	467,099	70,218		-	-			-		-	-	-	-	-		-	-	70,218	537,318

	1A	1B	1C	1D	1E	1F	1G	1H	1I	1J	1K	1L	1M	1N	1O	1P		
FY25-26 Adopted Budget	Beginning Fund Balance True Up	Reappropriate Special Revenue Project Reserves Projects Carried Over from Prior Year	One-Time District Office Moving Costs	Wood Beam Inspections & Repair sketches & some repairs	Revised revenue forecast	Property Tax/SSF Forecast Update	Lower Charter School Enrollment/Pass Through	Add 3.0 Licensed FTE Elementary to reduce blended grade classes	SIA, HSS and IDEA Grant Reductions from Adopted Budget Amounts	Staffing Reconciliation Estimates vs Actual Wages and Other Associated Payroll costs	Higher Property, Cyber and Liability Insurance Costs	Reduce 2025-26 Math Curriculum Transfer From \$3.0M to \$2.5M	Re-appropriate Music Instrument Purchases That were not delivered by 06/30/2025	Replace Two 28 year old passenger vans	ADA Accommodation and Second Floor Evacuation Chairs	Higher Transportation Costs	Total Amendment #1	FY 25-26 Amended Budget

FY25-26 Budget Amendment #1
 Medford School District 549C
 January 15, 2026

	1A	1B	1C	1D	1E	1F	1G	1H	1I	1J	1K	1L	1M	1N	1O	1P				
	FY25-26 Adopted Budget	Beginning Fund Balance True Up	Reappropriate Special Revenue Project Reserves Projects Carried Over from Prior Year	One-Time District Office Moving Costs	Wood Beam Inspections & Repair sketches & some repairs	Revised revenue forecast	Property Tax/SSF Forecast Update	Lower Charter School Enrollment/Pass Through	Add 3.0 Licensed FTE Elementary to reduce blended grade classes	SIA, HSS and IDEA Grant Reductions from Adopted Budget Amounts	Staffing Reconciliation Estimates vs Actual Wages and Other Associated Payroll costs	Higher Property, Cyber and Liability Insurance Costs	Reduce 2025-26 Math Curriculum Transfer From \$3.0M to \$2.5M	Re-appropriate Music Instrument Purchases That were not delivered by 06/30/2025	Replace Two 28 year old passenger vans	ADA Accommodation and Second Floor Evacuation Chairs	Higher Transportation Costs	Total Amendment #1	FY 25-26 Amended Budget	
Trust and Agency Fund																				
Resources																				
Beginning Fund Balance	2,239,459	139,272																139,272	2,378,731	
Current Year Property Taxes	-																	-	-	
Other Local Sources	2,047,361																	-	2,047,361	
Intermediate Sources	-																	-	-	
State Sources	-																	-	-	
Federal Sources	-																	-	-	
Transfers In	-																	-	-	
All Other Budget Resources	-																	-	-	
Total Resources	4,286,820	139,272		-	-			-		-	-	-	-	-	-	-	-	139,272	4,426,092	
Requirements																				
Instruction	2,135,000																		-	2,135,000
Support Services	-																		-	-
Community Services	-																		-	-
Facilities Acquisition & Construction	-																		-	-
Other Uses - Debt Service	-																		-	-
Other Uses: Transfers Out	-																		-	-
Contingency	-	139,272																	-	-
Unappropriated Fund Balance & Reserves	2,151,820	-																139,272	139,272	
Total Requirements	4,286,820	139,272		-	-			-		-	-	-	-	-	-	-	-	139,272	4,426,092	

FY25-26 Budget Amendment #1
 Medford School District 549C
 January 15, 2026

	1A	1B	1C	1D	1E	1F	1G	1H	1I	1J	1K	1L	1M	1N	1O	1P			
	FY25-26 Adopted Budget	Beginning Fund Balance True Up	Reappropriate Special Revenue Project Reserves Projects Carried Over from Prior Year	One-Time District Office Moving Costs	Wood Beam Inspections & Repair sketches & some repairs	Revised revenue forecast	Property Tax/SSF Forecast Update	Lower Charter School Enrollment/Pass Through	Add 3.0 Licensed FTE Elementary to reduce blended grade classes	SIA, HSS and IDEA Grant Reductions from Adopted Budget Amounts	Staffing Reconciliation Estimates vs Actual Wages and Other Associated Payroll costs	Higher Property, Cyber and Liability Insurance Costs	Reduce 2025-26 Math Curriculum Transfer From \$3.0M to \$2.5M	Re-appropriate Music Instrument Purchases That were not delivered by 06/30/2025	Replace Two 28 year old passenger vans	ADA Accommodation and Second Floor Evacuation Chairs	Higher Transportation Costs	Total Amendment #1	FY 25-26 Amended Budget
TOTAL ALL FUNDS																			
Resources																			
Beginning Fund Balance	28,954,955	9,381,500	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	9,381,500	38,336,455.11
Current Year Property Taxes	60,981,755	-	-	-	-	-	1,000,000	-	-	-	-	-	-	-	-	-	-	1,000,000	61,981,755.00
Other Local Sources	15,597,100	-	-	-	-	100,000	-	-	-	-	-	-	-	-	-	-	-	100,000	15,697,100.00
Intermediate Sources	3,661,330	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	3,661,329.80
State Sources	162,440,040	-	450,000	-	-	100,316	(1,000,000)	-	-	(455,311)	-	-	-	-	-	-	230,000	(674,995)	161,765,045.09
Federal Sources	14,842,866	-	-	-	-	-	-	-	-	(260,000)	-	-	-	-	-	-	-	(260,000)	14,582,866.00
Transfers In	11,540,000	-	-	250,000	1,208,000	-	-	-	-	-	-	-	(500,000)	-	-	-	-	958,000	12,498,000.00
All Other Budget Resources	1,500,000	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1,500,000.00
Total Resources	299,518,045	9,381,500	450,000	250,000	1,208,000	200,316	-	-	-	(715,311)	-	-	(500,000)	-	-	-	230,000	10,504,505	310,022,551
Requirements																			
Instruction	147,542,956	-	450,000	-	-	-	-	(1,000,000)	250,000	-	696,566	-	(500,000)	30,000	-	-	-	(73,434)	147,469,522.74
Support Services	78,672,914	-	-	-	-	-	-	-	-	-	(666,463)	365,901	-	-	130,000	79,000	330,000	238,438	78,911,352.75
Community Services	7,546,176	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	7,546,176.00
Facilities Acquisition & Construction	10,625,999	-	3,050,000	250,000	1,208,000	-	-	-	-	-	-	-	-	-	-	-	-	4,508,000	15,133,999.20
Other Uses - Debt Service	19,173,860	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	19,173,860.00
Other Uses: Transfers Out	11,540,000	-	-	250,000	1,208,000	-	-	-	-	-	-	-	(500,000)	-	-	-	-	958,000	12,498,000.00
Contingency	21,827,783	9,381,500	(3,050,000)	(250,000)	(1,208,000)	200,316	-	1,000,000	(250,000)	(715,311)	(30,104)	(365,901)	500,000	(30,000)	(130,000)	(79,000)	(100,000)	4,873,501	26,701,283.25
Unappropriated Fund Balance & Reserves	2,588,357	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	2,588,357.06
Total Requirements	299,518,046	9,381,500	450,000	250,000	1,208,000	200,316	-	-	-	(715,311)	-	-	(500,000)	-	-	-	230,000	10,504,505	310,022,551



EXECUTIVE SUMMARY

Meeting Date:	January 15, 2026
Agenda Item:	2026-27 School Year Calendar Approval
Item Type:	Action
Administrator:	Jeanne Grazioli
Objective:	Approve the 2026-27 School Year Calendar

Background:

The Medford School District is committed to publishing a school calendar as early as possible for our staff and families to help plan for next year. District leadership shared the draft calendars, Version A and B, with both certificated and classified representatives for feedback and published a community survey.

We received 336 responses to the family survey, and the results lean in favor of Version B. Our internal staff are recommending Version B, with a proposed start date of August 31st. Staff feedback indicated that Version A's earlier graduation date before Memorial Day would conflict with other important activities, such as sporting competitions. Staff also felt that Version A did not allow for sufficient time to prepare for the upcoming school year.

Additional Materials:

[Draft 2026-27 School Year Calendar Version A](#)

[Draft 2026-27 School Year Calendar Version B](#)

Recommendation: Based on feedback from employee unions and the community, staff recommends Version B for approval of the 2026-27 School Year Calendar.

Suggested Motion: *“I move to approve Version B of the 2026-27 school year calendar.”*

2026-2027 School Year Calendar

OPTION A

DRAFT 12.4.25

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July 2026						
Su	M	Tu	W	Th	F	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

July 3 Independence Day (Observed) - District Closed

August 2026						
Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Aug 13 & 14 New Teacher Pre-Inservice Days
 Aug 17-20 Inservice & Planning- No Students
 Aug 21 Some staff per contracts - No Students
 Aug 24 First Day of Instruction for designated students*
 Aug 25 First Day of Instruction for 7th, 8th, 10th - 12th grades
 Aug 25-28 Kindergarten Soft Start Week
 Aug 31 Full Day for Kindergarten Begins

September 2026						
Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Sep 4 Schools Closed - Some staff per contracts
 Sep 7 Labor Day - District Closed
 Sep 25 Mid-Quarter - No Students

October 2026						
Su	M	Tu	W	Th	F	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Oct 9 Statewide Inservice Day - Schools Closed
 Oct 23 End of First Quarter
 Oct 26 Grading Day - No Students

November 2026						
Su	M	Tu	W	Th	F	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Nov 11 Veterans Day - District Closed
 Nov 23-24 Conference Days - No Students
 Nov 25-27 Thanksgiving Break - District Closed

December 2026						
Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Dec 4 Mid-Quarter - No Students
 Dec 21-Jan 4 Winter Break - Schools Closed
 Dec 24 Christmas Eve - District Closed
 Dec 25 Christmas Day - District Closed

January 2027						
Su	M	Tu	W	Th	F	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Jan 1 New Year's Day - District Closed
 Jan 4 Classes Resume
 Jan 15 End of Second Quarter
 Jan 18 Martin Luther King Jr. Day - District Closed
 Jan 19 Grading Day - No Students

February 2027						
Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28						

Feb 15 President's Day - District Closed
 Feb 22 Mid-Quarter - No Students

March 2027						
Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Mar 19 End of Third Quarter
 Mar 22-26 Spring Break - Schools Closed
 Mar 29 Grading Day - No Students

April 2027						
Su	M	Tu	W	Th	F	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	










Apr 23 Schools Closed - Some staff per contracts & Snow Make-Up Day (if needed)

May 2027						
Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

May 3 Mid-Quarter - No Students
 May 26 IA Graduation Ceremony
 May 27 SMHS Graduation Ceremony
 May 28 NMHS Graduation Ceremony
 May 31 Memorial Day - District Closed

June 2027						
Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Jun 3 End of Fourth Quarter/ Last Day of School
 Jun 4 Grading/Pack-up Day - No Students
 Jun 7-8 Snow Make-up Days (if needed)
 Jun 18 Juneteenth (Observed) - District Closed

 No Students - Offices Open	 Inservice / New Teacher Orientation Days
 Schools Closed - Some staff per contracts	 Reserved for Snow Make-up Day - Some staff per contracts
 District Closed - Holiday/Non-Contract Day	 First Day for designated students / Last Day of School
 Conference Days - Non-School Day	 Mid-Quarter - Grading/Professional Development Day
*Elementary grades 1-5. Kindergarten Soft Start and Orientation Day for 6th and 9th grade	 End of Quarter

2026-2027 School Year Calendar

OPTION B

DRAFT 12.4.25

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July 2026

Su	M	Tu	W	Th	F	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

July 3 Independence Day (Observed) - District Closed

August 2026

Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Aug 20 & 21 New Teacher Pre-Inservice Days
 Aug 24-27 Inservice & Planning- No Students
 Aug 28 Some staff per contracts - No Students
 Aug 31 First Day of Instruction for designated students*

September 2026

Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Sep 1 First Day of Instruction for 7th, 8th, 10th - 12th
 Sep 1-3 Kindergarten Soft Start Week
 Sep 4 Schools Closed - Some staff per contracts
 Sep 7 Labor Day - District Closed
 Sep 8 Full Day for Kindergarten Begins

October 2026

Su	M	Tu	W	Th	F	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Oct 2 Mid-Quarter - No Students
 Oct 9 Statewide Inservice Day - Schools Closed
 Oct 30 End of First Quarter

November 2026

Su	M	Tu	W	Th	F	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Nov 2 Grading Day - No Students
 Nov 11 Veterans Day - District Closed
 Nov 23-24 Conference Days - No Students
 Nov 25-27 Thanksgiving Break - District Closed

December 2026

Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Dec 11 Mid-Quarter - No Students
 Dec 21-Jan 4 Winter Break - Schools Closed
 Dec 24 Christmas Eve - District Closed
 Dec 25 Christmas Day - District Closed

January 2027

Su	M	Tu	W	Th	F	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Jan 1 New Year's Day - District Closed
 Jan 4 Classes Resume
 Jan 18 Martin Luther King Jr. Day - District Closed
 Jan 22 End of Second Quarter
 Jan 25 Grading Day - No Students

February 2027

Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28						

Feb 15 President's Day - District Closed

March 2027

Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Mar 1 Mid-Quarter - No Students
 Mar 22-26 Spring Break - Schools Closed

April 2027

Su	M	Tu	W	Th	F	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Apr 2 End of Third Quarter
 Apr 5 Grading Day - No Students
 Apr 23 Schools Closed - Some staff per contracts & Snow Make-Up Day (if needed)

May 2027










Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

May 10 Mid-Quarter - No Students
 May 31 Memorial Day - District Closed

June 2027

Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

June 2 IA Graduation Ceremony
 June 3 SMHS Graduation Ceremony
 June 4 NMHS Graduation Ceremony
 Jun 10 End of Fourth Quarter/ Last Day of School
 Jun 11 Grading/Pack-up Day - No Students
 Jun 14-15 Snow Make-up Days (if needed)
 Jun 18 Juneteenth (Observed) - District Closed

 No Students - Offices Open	 Inservice / New Teacher Orientation Days
 Schools Closed - Some staff per contracts	 Reserved for Snow Make-up Day - Some staff per contracts
 District Closed - Holiday/Non-Contract Day	 First Day for designated students / Last Day of School
 Conference Days - Non-School Day	 Mid-Quarter - Grading/Professional Development Day
*Elementary grades 1-5. Kindergarten Soft Start and Orientation Day for 6th and 9th grade	 End of Quarter



EXECUTIVE SUMMARY

Meeting Date:	January 15, 2026
Agenda Item:	Staff Assignment Report
Item Type:	Report
Administrator:	Michael Campbell
Objective:	Approve new licensed and administrative staff

Background: Under current Board policy, one responsibility of the Board is to approve the hiring of licensed and administrative staff. The Staff Assignment Report includes that information, as well as any retirements or resignations.

Additional Materials: Staff Assignment Report

Recommendation: Administration recommends approval of the new hires.

Suggested Motion: A formal motion is not required if approved with the consent agenda.

**Medford School District Staff Assignment
School Board Meeting, January 15, 2026**

Recommendation for election to the position of Temporary Administrator for the 2025-26 school year:

Employee Name	School/Location	Position
Salinas, Jodi	Roosevelt Elementary	Principal
Stillwell, Megan	Roosevelt Elementary	Assistant Principal

Recommendation for election to the position of Temporary Teacher for the 2025-26 school year:

Employee Name	School/Location	Position
Lovrin, Jill	Options	Teacher

Resignations:

Employee Name	School/Location	Position	Effective Date
Albertini, Lauren	South Medford High School	ELA Teacher	1/20/2026
Chandler, Ryan	Special Education	Special Education Coordinator	12/17/2025
Schiermeyer, Lynn	North Medford High School	Special Education Resource Teacher	3/6/2026

Retirements:

Employee Name	School/Location	Position	Effective Date
Johnson, Russell	Griffin Creek Elementary	Special Ed Resource Teacher	6/30/2026
Losinski, Mark	Instructional Media Center	District Media Specialist	1/30/2026



EXECUTIVE SUMMARY

Meeting Date:	January 15, 2026
Agenda Item:	Consideration for approval of minutes from previous meeting(s)
Item Type:	Minutes
Administrator:	Jeanne Grazioli, Jodi Fahy
Objective:	Approve meeting minutes

Background: School Board policies BDDG and BDDC indicate the Board shall provide for the taking of written minutes of all its meetings, and that the minutes shall be available to the public after approval by the Board.

Additional Materials: Draft minutes for the December 11 Board Meeting.

Recommendation: Approve the minutes included with the consent agenda.

Suggested Motion: A formal motion is not required if approved with the consent agenda.



Regular Meeting of the Board of Education

Thursday, December 11, 2025 5:45 PM

Oakdale Middle School Room 230
815 S. Oakdale Ave.
Medford, OR 97501

Board members present: Lilia Caballero, Kendell Ferguson, Erik Johnsen, Sandra LaNier McHenry, Sunny Spicer, Michael Williams, and Angela Zbikowski

A video recording of the Board meeting can be found on the district website at [this link](#). The slide presentation can be viewed by clicking on Extras listed next to the meeting at [this link](#).

1. Call to Order / Pledge of Allegiance / Roll Call

Board Chair Kendell Ferguson called the meeting to order at 5:45 PM, led the Pledge of Allegiance, and confirmed a quorum through roll call. She welcomed attendees and read the district's vision statement.

2. Agenda Adjustments and Approval

No objections were raised. The agenda was approved by unanimous consent.

3. Superintendent Search Update

McPherson & Jacobson, LLC consultant Steve Lowder joined the meeting virtually to provide an update on the superintendent search. He reviewed the stakeholder meetings and public forums held on December 9 and 10, noting strong participation, and reported that the online survey remains open with approximately 200 responses received.

Lowder summarized stakeholder feedback, highlighting desired superintendent qualities and noting both positive aspects and concerns shared. He also reported that the district's strengths are expected to attract qualified candidates.

Lowder concluded by reviewing the recruitment timeline, including the January 6 application deadline, and outlined the Board's next steps and interview process.

4. Items for Information & Discussion

4.a. Interim Superintendent Report

Interim Superintendent Jeanne Grazioli presented a mid-year update on the district's focused priorities: MSD Relationships, Curriculum Optimization, Student Success, Foster Inclusive School Communities, and Financial Stewardship. She reviewed objectives related to strengthening partnerships, implementing the new math curriculum, increasing student attendance, educating students and families on bullying and violence prevention, and engaging the community in the district's financial future.

Board Directors asked follow-up questions regarding substitute availability, instructional scaffolding, student attendance strategies, behavior incident data, and new employee orientation.

Grazioli concluded by noting she will provide a reflection on Board and District priorities and seek Board feedback in January.

4.b. Board Priority: Safety & Security Update

Board Director Sunny Spicer exited the meeting prior to the presentation.

Director of Security and Emergency Management Kevin Plaisance provided an overview of district safety and security efforts, a Board and District priority. He highlighted a collaborative, continuous-improvement approach supported by data-driven practices.

Plaisance reviewed the district's partnership with the Medford Police Department, noting the positive role of school resource officers and school marshals in both safety and school culture. He also discussed preparedness efforts, including safety drills, a district reunification process walk-through held in October with local and regional partners, and Site Security Assessments conducted every three years with follow-up reviews.

Board Directors asked whether the October event was recorded and inquired about district investments in security systems; and expressed appreciation for the emphasis on culture and community partnerships.

4.c. 2026-27 Draft School Year Calendar

Interim Superintendent Jeanne Grazioli presented two draft options for the 2026–27 school year calendar with different start dates. She reported that feedback will be gathered from employee unions, teacher leaders, principals, and other staff. Preliminary input indicates a preference for a later start date of August 31. She

noted that an earlier start could impact athletic programs but would allow for an earlier graduation date in the spring.

Board Directors discussed a preference for the first week of school to be a full five-day week rather than a four-day week; noted the benefit of an earlier start resulting in an earlier end to the school year; asked how calendar options might align in the following year including the placement of Labor Day; and inquired about surveying families for their input.

5. Citizen Comments

Chair Ferguson reviewed the citizen comments guidelines and addressed feedback from the previous meeting, highlighting her discussions with parents about concerns regarding the math curriculum. Interim Superintendent Grazioli provided updates on the slow progress of the North Medford High School (NMHS) gymnasium rebuild and other structural issues. She also explained that student requests to use cell phones during passing periods and lunch are influenced by the Governor's executive order, and shared that she has worked with principals on a plan for student government to use cell phones for social media, ensuring consistency across high school campuses.

Kolton Preston, NMHS Student

Highlighted the Title IV Rule and encouraged the Board to fund boys volleyball. He noted that no new facilities are needed, as the team can share existing gym space and equipment.

Lonnie Haywood, NMHS Student

Emphasized the strong community and camaraderie within boys volleyball, describing how the sport promotes encouragement, compassion, and personal growth.

Diego McCartney, NMHS Student

Spoke on the broader benefits of the sport, including fostering a sense of belonging, encouraging student participation and engagement, and supporting academic success. He also noted community and local business support for funding and sustaining the program.

All three students encouraged the Board to approve boys volleyball as an OSAA sanctioned sport, highlighting both the social and developmental benefits for students.

Noting the strong interest from students, Chair Ferguson asked Interim Superintendent Grazioli to provide the Board with a follow-up outlining what would be required to start a boys volleyball team, including any potential barriers.

6. Recess

The meeting was recessed for 15 minutes.

7. Items for Information & Discussion (continued)

7.a. Board Priority: Financial Stewardship - Financial Update

Assistant Superintendent of Operations Brad Earl directed the Board's attention to the monthly financial statements. He provided an overview of the state's financial outlook, noting challenges including competing legislative priorities, wildfire and homelessness costs, potential changes in education funding, and delays in income and property tax collections. Earl emphasized close monitoring of the current biennium to avoid major reductions and expressed concern about the next biennium and possible federal funding cuts.

He also updated the Board on the audit process, noting delays due to the federal government shutdown and that the state granted an additional month for completion. Board members were invited to meet in a subcommittee with the auditor to review details before a full report is presented.

A Board member inquired about potential increases in the cost of medical insurance.

7.b. Review Budget Committee Applicants

Assistant Superintendent of Operations Brad Earl reported that the district received two applications for the two vacancies on the Budget Committee. Both candidates were deemed viable, with one having previously served multiple terms on the committee and the other recently serving on an attendance zone committee. The Board expressed support for closing the application process and appointing both candidates to the Budget Committee in January.

7.c. District-At-A-Glance Profile Review

Senior Executive Director of Teaching and Learning Todd Bloomquist presented the District At-A-Glance Profile, covering several key areas:

- Predictors of Success
- Comparative performance on Oregon State Achievement System (OSAS) English Language Arts (ELA) assessments
- Comparison of the top 10 largest districts, focusing on poverty and assessment rates
- Schools achieving more than a 3% increase in ELA and Math, along with improvements in other areas
- Regional data comparisons
- Schools with a 5% or greater increase in attendance

Board Directors asked follow-up questions, including inquiries about graduation rate comparisons with local districts, the strategies in place to ensure students graduate with strong reading skills, the support systems designed to keep students

on track to graduate, and how the data is used by building leaders to provide targeted support or implement necessary changes.

8. Board Action Items

8.a. Oregon School Boards Associations (OSBA) Election

A motion was presented by Caballero and seconded by Zbikowski to elect Jay Chick for the OSBA Board of Directors, representing the Southern Region Position #5.

Roll call vote: Caballero: Yea, Johnsen: Yea, Zbikowski: Yea, Williams: Yea, LaNier Henry: Yea, Ferguson: Yea, Spicer: Absent
Result: Motion passed (Yea: 6, Nay: 0, Absent: 1)

8.b. Approval of SIA Grant Agreements

Interim Superintendent Grazioli informed the Board that the information for the grants were presented at the prior meeting and that the Oregon Department of Education requires Boards to formally approve the final grant agreements.

A motion was presented by LaNier McHenry and seconded by Zbikowski to approve the SIA grant agreements as presented.

Roll call vote: Caballero: Yea, LaNier McHenry: Yea, Johnsen: Yea, Williams: Yea, Zbikowski: Yea, Ferguson: Yea, Spicer: Absent
Result: Motion passed (Yea: 6, Nay: 0, Absent: 1)

8.c. School Board Policies - *second reading*

A motion was presented by LaNier McHenry and seconded by Zbikowski to readopt the policies as presented in the December 11th policy packet.

Roll call vote: Williams: Yea, Caballero: Yea, LaNier McHenry: Yea, Johnsen: Yea, Zbikowski: Yea, Ferguson: Yea, Spicer: Absent
Result: Motion passed (Yea: 6, Nay: 0, Absent: 1)

9. Consent Agenda

The following items were presented on the consent agenda:

- Staff Assignment Report
- Minutes from Previous Meetings

No objections were raised. The consent agenda was approved by unanimous consent.

10. Announcements

Chair Ferguson acknowledged the upcoming winter break, from December 22 to January 4, and reminded the Board of the meeting scheduled for January 15. She informed the Board that an executive session would be needed to discuss negotiations and the interim superintendent's evaluation, proposing that the executive session be scheduled prior to the regular meeting, with the start time for the regular meeting moved to 6:00 PM. The Board agreed to this proposal.

11. Adjournment

With no further business, the meeting was adjourned at 8:10 PM.

DRAFT



EXECUTIVE SUMMARY

Meeting Date:	January 15, 2026
Agenda Item:	Superintendent Search Process - Next Steps
Item Type:	Announcements
Administrator:	Board Chair Kendell Ferguson
Objective:	Update the Board and public on the superintendent search process and outline next steps

Background:

The Board convened a Special Meeting on January 8 with consultants Steve Lowder and Mike Scott from the McPherson & Jacobson search firm to outline the next steps in the superintendent search process. During the meeting, the consultants shared that they have received 26 applications, which will be reviewed for alignment with the Board's specified criteria. Based on this review, a shortlist of candidates will be developed for the Board to evaluate in the coming weeks. The agreed-upon timeline is as follows:

- Week of January 19 (or earlier): The Board will receive the application packets for review.
- January 27: A Special Board Meeting in executive session to discuss and deliberate on which candidates to advance to the finalist stage. The Board may schedule Zoom interviews to assist in this decision.
- February 3 & 4: Reserved for potential Zoom interviews, if necessary.
- February 9, 10 & 12: Finalist interviews (Note: the Board may require only two of these dates).

The Board also approved a hybrid interview process, which will include two stakeholder panel groups. These panels, consisting of parents, students, community members, district staff, and administrators, will conduct confidential interviews with the finalists and provide feedback to the Board.

Additional Materials: None

Recommendation: N/A

Suggested Motion: N/A