



# PHOENIX-TALENT SCHOOLS

EXCELLENCE *for* EVERYONE

Regular Board Meeting - 6:00 PM

Wednesday, February 4, 2026

In-Person at Orchard Hill Elementary School

<https://us02web.zoom.us/j/81595324230?pwd=HECGQ5us0c32QnUkY29b1fsunECyFb.1>

Password: 769838

**Agenda Español**

**Minutas Español**

## AGENDA

- A. **Executive Session - 5:00 p.m. — This session is closed to the public under ORS 192.660 (2)(b)(i)**
- B. **Regular Session Call to Order - 6:00 p.m.**
- C. **Student Representative Report**
- D. **Accentuate the Positive**
- E. **Citizen Comments**
- F. **PTEA/OSEA Association Updates**
- G. **Superintendent Report**
- H. **Targeted Feedback Survey Selection**
- I. **Consent Agenda**
  - 1. Approval of Agenda
  - 2. Approval of Minutes from 1/8/26 & 1/22/26
  - 3. Personnel Report
- J. **Information and Discussion**
  - 1. **Legislative / OSBA Update**
  - 2. **Committee Reports**
  - 3. **SOESD 2026-2027 Local Service Plan & SSA Comprehensive Support Plan**
- K. **Recess - 7:15 - 7:25**
- L. **Action Items**
  - 1. **Criteria for Evaluating the Superintendent**
  - 2. **First Student Renewal**
- M. **Review of the Next Meeting Agenda**
- N. **Adjournment**

Phoenix-Talent School District #4 is an Equal Opportunity Employer and, in accordance with Federal and State Legislation, does not discriminate on the basis of race, sex, religion, age, national origin, or marital status, physical or mental disability in employment practices or education programs. **If you need special accommodations for language interpretation or because of a disability**, please contact the District Office Executive Assistant two days prior to meeting at 541-535-1511 Voice/TD.

Phoenix Talent Schools

# SURVEY SNAPSHOT

FALL 2025

53

OVERALL  
SATISFACTION

%

OF RESPONDENTS  
SATISFIED/  
EXTREMELY SATISFIED

3.6

FOOD  
EXPERIENCE

3.9

ATMOSPHERE &  
ENVIRONMENT

4.3

STAFF AND  
SERVICE  
EXPERIENCE

206

TOTAL  
NUMBER OF  
RESPONDENTS

FIELDING  
DATES

11/05-12/16  
2025



SCORES ARE BASED ON A 1-5 SCALE,  
WITH 4-5 CONSIDERED EXCELLENT.

# OVERALL SATISFACTION

85

## GUESTS ARE LOVING

- Lots of Choices & Variety
- The Friendly Staff
- Pizza, Nacho's, Parfaits
- Corndogs, Burgers, Chicken Sandwiches
- Customizable Options & Bars
- Fresh Fruit & Veggies
- Wraps, Subs & Sandwiches
- Pasta, Potatoes, Breakfast for Lunch

## AREAS OF OPPORTUNITY

- More Vegan Options
- Crispier Fries
- More Low Carb Options
- Portion Sizes
- More Flavor & Seasoning
- Larger Staff Meal Options

## COMMENTS FROM GUESTS

- Really great stuff that I have tried. The pumpkin apple parfait.
- My son really likes the variety of foods, and I appreciate that they are healthier options (like whole grains). He tries a wider variety of foods now, including ones we make at home--which are always whole grain.
- We have so many options and I love all the fruit choices we get. I also like that the food tastes good and is pretty healthy. I like the variety.
- My kids love having options. They can always find something they like. Waffles, Chex, bagel, yogurt, peppers, sweet potatoes, pizza sandwich, chicken and rice, cheeseburger.
- It tastes good and there's good portion sizes. It's cooked well. Not burnt.
- The staff is super friendly. They are always smiling, and happy to answer any questions.
- I love the food here at Talent middle school and it really fills me up. I love the cheeseburgers, fries and pizza they survey here. I love how there is so many options.

# FOOD EXPERIENCE

DRIVERS OF SATISFACTION

SCALE 1-5

56%

MEALS TASTE  
GOOD

57%

DISHES ARE  
NICELY PRESENTED

60%

MEALS ARE  
DIFFERENT  
EVERYDAY

49%

MEALS MAKE  
ME FEEL FULL

53%

MEALS PROVIDE  
ME ENERGY  
FOR THE DAY

62%

THEME MEALS  
MAKE IT  
MORE FUN

62%

CHECK THE MENU  
EVERYDAY

## ACTION PLAN

OPPORTUNITIES THAT WILL POSITIVELY IMPACT CUSTOMER SATISFACTION BASED ON SURVEY DATA

OPPORTUNITY	ACTION	LOCATION	TIMELINE
Vegan & Vegetarian Options	Market The options available more	District	March 2026
Fill students up	Offer additional healthy sides to help students feel full. Market the option to return to salad bar for more if your not full.	District	March 2026

# DINING ENVIRONMENT EXPERIENCE

DRIVERS OF SATISFACTION

SCALE 1-5

63%

PLACE WHERE I  
LIKE TO SPEND  
TIME WITH FRIENDS

56%

DINING SPACE IS  
WELL DECORATED

89%

DINING SPACE IS  
CLEAN

## ACTION PLAN

OPPORTUNITIES THAT WILL POSITIVELY IMPACT CUSTOMER SATISFACTION BASED ON SURVEY DATA

OPPORTUNITY	ACTION	LOCATION	TIMELINE
Decorating	Get more posters & fun marketing hung in the cafeterias	All Sites	Fall 2026

# CONSUMER PROFILES & DINING HABITS

## RESPONDENT TYPE

57	STUDENT
86	PARENT/GUARDIAN
63	FACULTY/STAFF

## GRADE LEVEL

59	ELEMENTARY SCHOOL (K-5)
28	MIDDLE SCHOOL (6-8)
56	HIGH SCHOOL (9-12)

## FREQUENCY OF MEALS AT SCHOOL

94	EVERYDAY	66	SOMETIMES
42	NEVER		

## IF RESPONSE IS NEVER, WHY?

Pack my own lunch/ Bring my own lunch from home

Cost money I don't have / Not paying for Meals at work

Allergies / Healthier Options from home

I LIKE TRYING FOOD I DON'T USUALLY EAT AT HOME	110	YES
	50	NO

I USUALLY FINISH MY PLATE	98	YES
	62	NO

## IF RESPONSE IS NO TO FINISHING PLATE, WHAT ARE REASONS FOR THAT?

34 I DON'T HAVE ENOUGH TIME

12 THE FOOD IS COLD

43 I DON'T LIKE IT

19 I'M NOT HUNGRY ANYMORE

11 OTHER

# ACTION PLAN

OPPORTUNITIES THAT WILL POSITIVELY IMPACT CUSTOMER SATISFACTION BASED ON SURVEY DATA

OPPORTUNITY	ACTION	LOCATION	TIMELINE
Local Product	Continue swapping out ingredients for local ingredients & market them more.	District	5 year plan
Batch Scratch Cooking	Build on cooking techniques with staff; utilize equipment available and cook during serving.	All Sites	On- going
A la cart beverage options	Add smart snack compliant beverages	Middle & High School	2026-27SY
Staff Meals	Create & Market a larger special Staff Meal.	Elementary Schools	Monthly
Marketing	Continue to add more news to the food service page. Share more marketing flyers with district admin. Suggest making a Phoenix Talent Nutrition Department Facebook Page.	District	2026-27SY

# SURVEY RESULTS

DEMOGRAPHICS		FALL 2025
<b>CONSUMER TYPE</b>		<b>%</b>
Student		28
Parent/Guardian		43
Faculty/Staff		29
<b>DINING FREQUENCY</b>		<b>%</b>
Everyday		47
Sometimes		33
Never		21
<b>GRADE LEVEL</b>		<b>%</b>
Elementary School (K-5)		41
Middle School (6-8)		20
High School (9-12)		39

DINING HABITS		FALL 2025
<b>LIKE TRYING NEW FOOD</b>		<b>%</b>
Yes		69
No		31
<b>USUALLY FINISH MY PLATE</b>		<b>%</b>
Yes		61
No		39
<b>IF RESPONSE IS NO, REASONS FOR THAT</b>		<b>%</b>
I don't have enough time		55
The food is cold		19
I don't like it		69
I'm not hungry anymore		31
Other		18

<b>OVERALL SATISFACTION</b>		<b>1-5 SCALE</b>
Fall 2025 Overall Satisfaction		3.6

<b>FOOD EXPERIENCE</b>		<b>3.6</b>
The food tastes good		56%
Dishes are nicely presented		57%
The meals are different everyday		60%
School meals make me feel full		49%
School meals provide the energy for the day		53%
Theme meals make eating here more fun		62%
I can check the menu everyday		62%

<b>DINING ENVIRONMENT EXPERIENCE</b>		<b>3.9</b>
The cafeteria / dining hall is a place where I like to spend time with friends		63%
The cafeteria / dining hall is well decorated		56%
The cafeteria / dining hall is clean		89%

<b>STAFF &amp; SERVICE EXPERIENCE</b>		<b>4.3</b>
The people who serve me are friendly		91%
Meals are served quickly		79%

# Blueprint & Beyond

COMPONENT DISTRICT  
EDITION

A regular update from the  
Superintendent's Office  
for the districts we serve.



## 1. Superintendent's Message

Sometimes strong ideas encounter circumstances that make it difficult for them to move forward as originally hoped. That has been the case with the Southern Oregon Career Center (SOCC).

Former Superintendent Scott Beveridge envisioned a regional career center that would serve as a hub for workplace preparation in Southern Oregon, similar to the Willamette Career Academy operated by WESD. In partnership with our component district superintendents, Scott committed two years of "seed money" to explore whether such a program could be successfully launched here.

Initially, several districts expressed interest in sending students to one of three proposed programs. However, uncertainty at the federal level and unexpected budget pressures at the state level led some districts to reconsider their participation. Despite these challenges, School Improvement Coordinator Brad Capener, who also served as the SOCC principal, worked diligently to secure business and industry partners. Many of these partners generously donated space, equipment, or other resources to support the program.

This year, ten students enrolled in the Medical Assisting program, where Amy Kesterson provided strong instruction and support. All participating students will complete the program with a Phlebotomy certificate, positioning them to enter the workforce immediately after graduation. While this represents a meaningful success for those students, we have not been able to secure sufficient enrollment to sustain the program long term.

As a result, SOCC will complete the 2025–26 school year and then sunset at the end of the year. I want to extend my sincere thanks to Brad, Amy, and the many others who contributed their time, expertise, and energy in an effort to bring Scott's vision to life. While the program will not continue, the students who participated this year gained valuable skills and experiences, and we are grateful for the opportunity to have supported their learning.

Sincerely,  
Mark

*Mark Angle-Hobson*  
ED.D.

Letter from Brad Capener,  
SOCC Principal & School  
Improvement Coordinator

## This Edition's Topics!

- 1.....Superintendent's Message
- 2.....Save the Date: District Office Grand Opening
- 3.....Strategic Planning Update: Engagement & What's Next
- 4.....Regional Job-Alike Groups Convened by SOESD
- 5.....Local Service Plan Process & Draft
- 6.....Division 22 Workshop for School Administrators

# 2. Save the Date: *SOESD District Office Grand Opening!*

You're invited to the

**SOESD**  
*District Office*

**GRAND  
OPENING**

Ceremony + Ribbon Cutting



**Tuesday, April 14, 2026 | 4 – 6pm**

5465 S. Pacific Hwy.  
Phoenix, OR 97535



**SOESD**

Southern Oregon Education Service District



# 3. Strategic Planning Update:

## *Engagement & What's Next*

### Strategic Planning Engagement



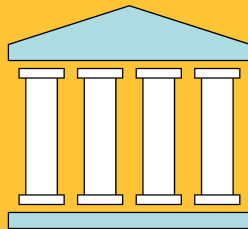
# 193

People Participated In The  
Focus Groups + Survey!

*Thank  
you!*

*We appreciate everyone who participated in the first and second round of focus groups and took the time to complete the survey*

## What's New?



### First Draft of Pillars:

1. Educational Equity & Student Support Systems
2. People, Culture & Organizational Belonging
3. Operational Excellence, Systems & Stewardship
4. Regional Partnerships, Engagement & Impact
5. Innovation, Learning & Future-Ready Practices

## What's Next?

### Validation Survey Coming Soon!

We will share the Strategic Plan on January 30, along with a validation survey open through February 9.

This ensures each pillar is aligned with the goals that best serve our districts.

# 4. Regional Job-Alike Groups:

*Convened by SOESD*



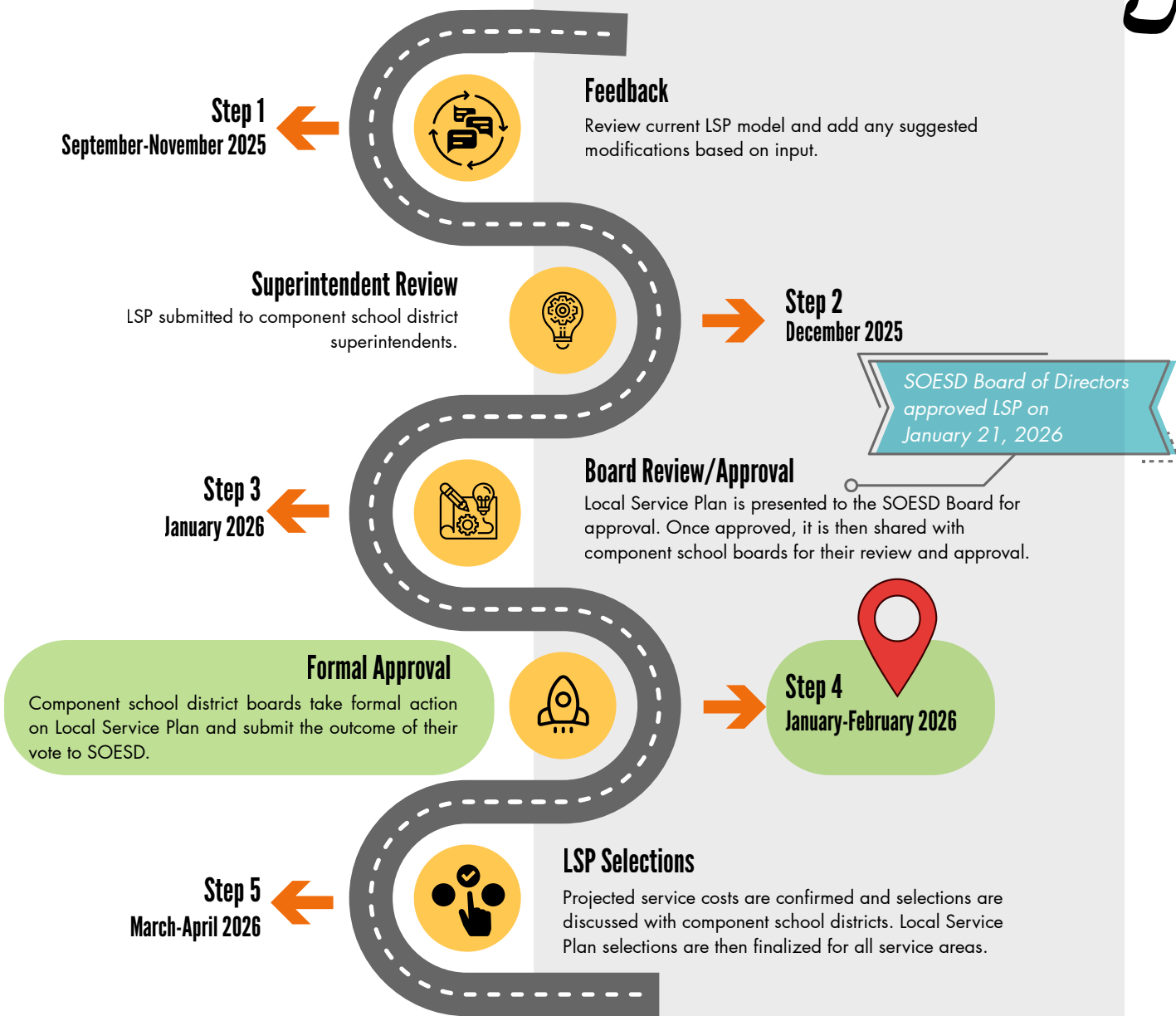
Check out this list of regular regional meetings convened by SOESD leadership. These job-alike groups bring staff together to enhance educational opportunities, foster collaboration, and strengthen collective efficacy for staff and students across the region.

Please reach out if you're interested in learning more or joining any of the groups below.

## Regional Job-Alike Groups

- **Superintendents Meeting:** Dr. Mark Angle-Hobson, Superintendent
- **Curriculum Directors Meeting:** Kylee Harrison, Assistant Superintendent
- **Special Education Directors Meeting:** Kylee Harrison, Assistant Superintendent
- **Business Managers Meeting:** Jeanetta Woodside, Chief Financial Officer
- **Human Resources Meeting:** Ryan Swearingen, Chief Human Resources Officer
- **Technology Director Meetings:** Tom Bigboy, Chief Information Officer
- **Communications Managers Meeting:** Erin Green, Communications and Partnerships Coordinator
- **Focal Student Groups Regional Meeting:** Andrea Townsend, Focal Student Groups Coordinator & Lise Prusko, Focal Student Groups Program Manager

# 5. Local Service Plan: *Process & Draft*



Digital  
LSP Draft

**CLICK  
HERE**



Storybook  
LSP Draft

# 6. Division 22 Workshop

## *For School Administrators*

### WORKSHOP FOR SCHOOL ADMINISTRATORS

## WRITING COMPREHENSIVE SUBSTANCE USE PREVENTION AND INTERVENTION PLANS

Join us for a half day in-person workshop

**February 18, 2026**  
8:00am- 12:00pm PST

**Southern Oregon ESD**  
101 N Grape St,  
Medford, OR 97501

[REGISTER FOR THE WORKSHOP HERE](#)

### DEVELOPING SUBSTANCE USE PREVENTION PLANS HALF-DAY

- Deepen your understanding of Division 22 Standard requirements for comprehensive substance use prevention and intervention programs, including non-compliance pitfalls to avoid.
- Develop, review, or update your district's Comprehensive Substance Use Prevention and Intervention Plans (OAR 581-022-2045) with support from state and regional experts.
- Discover opportunities for community collaboration and partnership to support plan implementation.
- Identify strategies to align substance use prevention efforts with other state-required plans, such as Suicide Prevention, Human Sexuality, and Health Services plans.

# Ending Balance Turns Positive



## 2025-27 General Fund Revenue Statement (millions)

	December 2025 Forecast	March 2026 Forecast	Change from Prior Forecast
Beginning Balance	\$2,018.7	\$2,165.8	\$147.1
Revenues (millions)			
Personal Income Tax*	\$29,941.0	\$29,898.9	-\$42.1
Corporate Income Tax*	\$3,199.8	\$3,295.0	\$95.3
All Other Revenues	\$2,100.5	\$2,152.9	\$52.4
Net GF Revenues	\$35,241.3	\$35,346.9	\$105.6
Available Resources (Balance + Revenues):	\$37,260.0	\$37,512.7	\$252.7
Appropriations	-\$37,323.1	-\$37,314.8	\$8.3
Projected Ending Balance*	-\$63.1	\$197.9	\$261.1

\* includes offsets and RDF transfers

### Key Takeaways:

- **Beginning Balance** improves \$147 million
- **Revenues** up \$106 million
- **Ending balance** now up \$198 million



# PHOENIX-TALENT SCHOOLS

EXCELLENCE *for* EVERYONE

## REQUEST FOR PROPOSALS

### PRE-SCHOOL PROVIDER

RFP Issued: February 11, 2026

Submission Deadline: March 20, 2026 – 2:00 PM. PST

Phoenix-Talent School District 4 (“the District”) invites interested pre-school and early childhood learning providers to submit proposals to provide high-quality, on-site pre-school services on the campus of Orchard Hill Elementary School, located at 1011 La Loma Drive in Medford, Oregon.

Proposals must be received at the District Administration Office by 2:00 PM, PST on March 20, 2026 for consideration. Proposals may be submitted in hard copy form or electronically by email. In addition, and if requested by the District, **selected proposers must be available for an interview with the Selection Committee on a date to be determined between April 13-17, 2026.**

A copy of the Request for Proposal document is available on the Phoenix-Talent School

District #4 website at <https://www.phoenix.k12.or.us/departments/early-learning-center>.

Please direct proposals to:

Kelly Soter  
PTS Early Learning Director  
Phoenix-Talent Schools 401 W. Fourth St.  
P.O. Box 698 Phoenix, OR 97535  
kelly.soter@phoenix.k12.or.us



# PHOENIX-TALENT SCHOOLS

EXCELLENCE *for* EVERYONE

Board Meeting – 6:00 PM

Thursday, February 4, 2026

In-Person at Orchard Hill Elementary School

ZOOM Link:

<https://us02web.zoom.us/j/81595324230?pwd=HECGO5us0c32QnUkY29b1fsunECyFb.1>

Meeting ID: 815 9532 4230 Passcode: 769838

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# PHOENIX-TALENT SCHOOLS

EXCELLENCE *for* EVERYONE

Regular Board Meeting  
Thursday, January 8, 2026 6:00 PM Pacific

Phoenix Elementary School  
215 North Rose Street  
Phoenix, OR 97535

Michael Campbell:	Present	Diana Rasmussen:	Present
Nancy Castillo-McKinnis:	Present	Dawn Watson:	Present
Polly Farrimond:	Present	Rebecca Weathers:	Present
Rick Nagel:	Present	Present: 7, Absent: 0	

A. Executive Session - 5:30 p.m. — This session is closed to the public under ORS 192.660 (2)(b)

B. Regular Session Call to Order - 6:00 p.m.

C. Student Representative Report

- **Rachel Pepin** said that Student Representative Elia Santos is not here with us this evening because she is playing at one of the basketball games at Hidden Valley, and we wish her good luck. Rachel invited everyone to the first league games on the 20th and the theme is glow out so bring your bright neon colors. This Saturday there is a cheer competition in Thurston. Rachel gave a shout-out to all the college grad coaches for helping students with scholarships and choosing a college.
- **Emily Emry** said that they are working with a student from each advisory class, and they will discuss ways in how to make advisory more productive.
- **Lincoln Potochnick** said before they left for winter break, the leadership team had a giving tree. Members from the community donated gifts for students whose parents might not be able to afford them and there was a great turnout. Lincoln said he has been doing this for four years and this was the biggest number of gifts he'd ever seen.

D. Accentuate the Positive

**PES Principal Shawna Schleif shared the following:**

- Ms. Schleif was so thankful to the board for the harmony, collaboration and the dedication that they have to our students.
- We also want to extend our gratitude to the high school leadership team for the incredible support they showed our families with their giving tree. Our conference room was overflowing with beautifully wrapped gifts, a powerful reflection of the generosity of our school and the greater community.
- Ms. Schleif gave a shout-out to our Community Care team. They are doing unimaginable things for our families that are struggling. Families are met with compassion and support without any sort of judgement. So, thank you to Kelly Soter, Katie McCormick, Nuvia Pineda, and Laura Millette. The compassion and care they show our families each and every day is truly incredible.

- Before we leave for winter break, we do a traditional sing-along. This year, our new music teacher, Sage Meadows, brought her band with her, and it totally transformed the feeling of the whole event. Their presence brought a special energy and sense of connection to the event so thank you so much Sage.
- Ms. Schleif talked about the attendance challenge, stating that it's not just about the challenges, it's about the work of staff creating relationships with our families and students.
- Finally, a heartfelt thank you to Tiffanie Lambert and the Ashland Community Health Foundation for donating hats and mittens to every PTS Elementary student. This is one of my favorite days at PES. Our students are incredibly appreciative, and knowing that a donor hand-knit 930 hats, now warming and brightening our students, is nothing short of remarkable.
- This is the midway point in the school year, and we are getting ready to do our mid-year diagnostics. We are excited about seeing the growth that our students have made so far.

**OHES Principal Kent Vallier shared the following:**

- Principal Vallier said that twice this week, he was visited by two guests who had known Orchard Hill well over the past three years. Both folks made similar comments, "It seems really calm here." And yes, thanks to our staff, Orchard Hill is a much "calmer" school.
- Principal Vallier shared the following data compiled by Rich Mauldin comparing this year to last year on reminders and notifications for student behavior. November and December **2024** reminders and notifications totaled 226. This year, November and December **2025** reminders and notifications totaled 74. So, there is a reason why it feels calmer and Mr. Vallier thanked the entire staff and Orchard Hill.

**TES Principal Heather Lowe shared the following via Javier del Rio:**

- Mr. del Rio read the following for Ms. Lowe: Good evening, Board. I hope everyone had a wonderful holiday season. I apologize for not being able to attend tonight's meeting. I have the distinct pleasure of taking statistics on Thursday nights this term.
- First, I want to express many thanks to our amazing music teacher, Sage Meadows, who orchestrated a beautiful family singing event before the break. The library was filled with the sweet sound of children's voices singing classic holiday tunes. This was followed by an epic Wrap the Principal show, honoring our students' dedication to regular attendance. Then, we ended our special day with the Mustang Mile. It was a delightful way to kick off the winter break.
- I also want to recognize our PTA, led this year by Matt Nawoichik, who continues to show incredible dedication to our school and community. Before the break, we hosted our annual Winter Craft Day. This year, the event was paired with a toy swap. While the kids were distracted sipping hot cocoa and crafting in our cafeteria, parents slipped away into our gym to find the "just right" gift for their child. We couldn't do what we do at TES without these amazing parents.
- Coming up next at TES, we have our highly anticipated Talent Show on January 28th at 6:00 in the PHS Rose Theater. Tryouts are next week, and the kids are busy practicing their moves, songs, and routines. We hope you can join us for the big show.
- All my gratitude to the Ashland Community Health Foundation for orchestrating another adorable and cozy hat and mitten distribution yesterday. It was the talk of the school!

- Finally, I am excited to share positive updates on our progress towards our academic and attendance goals at the upcoming JAB meeting. I will be playing hooky from statistics for that one!

**PTRA Principal Aaron Santi shared the following:**

- Mr. Santi thanked the school board for their continued support of PTRA. Because of your support, we're able to meet students where they are and help them succeed in the ways that work for them. Right now, PTRA and PES are co-teaching a student who was struggling with full days at PES, but needed his Special Education services and wanted to stay connected to his class for PE and Music. With this partnership, he attends PES in the mornings for services and time with his classmates, then goes home where PTRA provides his academic instruction. This allows him to learn in a setting where he can be successful. I also want to recognize the extra time and effort of PTRA's Maddie Macias and the PES office staff, Lori Delgado and Wendy Duffie, for their help in coordinating those days. This kind of student-oriented flexibility and support is a hallmark of the Phoenix-Talent Schools.

**TMS Asst. Principal Allison Hass shared the following:**

- I first want to thank our custodial department for all of their hard work on our campus over break. We always come back from breaks to clean buildings and closed maintenance tickets, and it is always a reminder of how hard our custodial staff work and the pride they take in our building. Big thank you to our TMS custodial team, Stephen McCormick, Mike Copeland, and Ana Lopez, for their hard work.
- I want to highlight our Special Education Department. I have been so grateful this year for our Special Education team and the way they really work together to support one another, step in when needed, and just do the next right thing to make sure our kids are supported. This team really shows up every day, ready to lend a hand and do what needs to be done. I am really grateful to the whole team, including teachers: Tera Dean, Nathan Clinton, and Susie Goetz, our IA team: Eric Richey, Karina Zapata, Adrik Lamar, Jose Villalobos, Alister Ryals, and Abby Humphreys, and the District team who is always there when we really need that extra support: Derek Rodman, Kevin Wheeler, Zhaleh Shirvanioun, and of course, Tiffanie Lambert and Charlene Patten.
- Lastly, I want to thank our office and student support teams. On those days when it feels like the to-do list never ends, these folks are always right there making sure things get done and our kids and families are taken care of. So big thank you and recognition to these teams, Julee Lockett, Deanne Tanner, Vanessa Jimenez, Felipe Reyes, Curran Wilson, and Misty Hutsell.
- Ms. Hass thanked the board for all of their support for TMS and the district and all the work that they do for our kids and families.

**PHS Principal Kalin Cross shared the following:**

- Ms. Cross thanked the board for all they do and for how they model servant leadership for our community, and how they do it in a way that is so gracious and kind and authentic.
- Ms. Cross gave a shout-out to the Student Services team who have been working really hard on creating some MTSS processes at the high school.

- Ms. Cross gave a shout-out to Alyssum Barber and the Instructional Leadership Team, who have focused on collective efficacy and used data to create a Writing Across the Curriculum initiative.
- Ms. Cross shared that the grad coaches launched our first big intervention this month. We now have Wednesday School for 9th grade students who are not currently on track for credits.
- Ms. Cross gave a shout-out to Jon McCalip and the maintenance crew for putting in new lights in the gyms over the winter break.
- Ms. Cross thanked Neil Carvalho and Andi Terrell for making the PHS sweatshirts for the board that is in their baskets.

**Amy Honts of Sodexo food service shared the following:**

- Ms. Honts thanked Jon McCalip for his organization, communication and just the overall wonderful level of service & support he provides us with food service. We just got two new dishwashers that we planned on having installed over the break, but due to the manufacturer, shipping and installation were postponed until this week. And as you can imagine, not having a dishwasher during school days can be very stressful in the kitchen, but Jon made everything way less stressful and got the units back up and working as quickly as possible.
- We have continued to purchase local meats and produce and strategically replace products in our menu. We are excited to have local beef taco meat replacing our commodity turkey taco meat in all the schools this month. As well as local ground pork sausage replacing all pork sausage crumbles in our products.
- Last, I want to invite everyone to come see me present at the Oregon Farm-to-School Conference on January 30th. The conference is a 2-day conference covering both garden education and local foods in schools. I believe we can use our farm-to-school grant to help cover some of the cost of attending if anyone is interested in attending. I know we can for staff; I would just need to confirm for board members if we are interested. And if not this year, maybe next year, as I see Phoenix talent schools continuing to be a leader in the state for our farm-to-school commitment in our school lunch program.

**E. Citizen Comments**

**F. PTEA/OSEA Association Updates**

- Jennifer Baker from TMS spoke on behalf of the PTEA, and she is also on the union executive council. Jennifer said that they are working closely with our special education staff and the general education teachers on how to best support our TLC students within their classrooms. At the end of this month, we are working on creating a gathering for our new members throughout the district to ensure they feel supported and connected.

**G. Superintendent Report**

- Supt. Barry echoed the words of our staff and his appreciation for the board and student representatives. We have a very supportive and collaborative board and are grateful for that.
- The City of Talent is asking local leaders for their input on their upcoming budget scenarios and strategic plan on Jan 13th. Please let me know if you plan to attend.

- Our Division 22 report was approved and for the 3rd year in a row, Denise has been recognized as a state leader and will be used as an exemplar.
- There is a Community Care update in your packets. The months of November and December were very busy for this department, and they truly are a blessing for so many students and families in our district. Also, Katie McCormick was awarded the Southern Oregon Kind award by United Way for all the work she does for community care, healthy block party, girls on the run and so much more. We are so lucky to have Katie, and she has a tremendous impact on our district and its benefits our kids and families.

#### H. Consent Agenda

- I move to modify the agenda by moving the action item of interviewing the Budget Committee applicant to before information and discussion. This motion, made by Michael Campbell and seconded by Polly Farrimond, carried.  
Michael Campbell: Yea, Nancy Castillo-McKinnis: Yea, Polly Farrimond: Yea, Rick Nagel: Yea, Diana Rasmussen: Yea, Dawn Watson: Yea, Rebecca Weathers: Yea

I move to approve the consent agenda as presented with the changes discussed. This motion made by Dawn Watson and seconded by Rick Nagel. Being there were no objections, the consent agenda was approved.

H.1. Approval of Revised Agenda

H.2. Approval of Minutes from 12/11/25

H.3. Personnel Report

#### K.2. Interview Budget Committee Applicant(s)

Chair Campbell thanked David Sherman for attending the meeting virtually and submitting his application for the Budget Committee vacancy. David shared that he has a background in business and teaching and works with the SMART program at PES. David wants to be able to give back where he can.

Both Director Farrimond and Director Nagel knows Mr. Sherman and spoke very highly of him.

I move to appoint David Sherman to a 3-year term on the Budget Committee. This motion, made by Rick Nagel and seconded by Polly Farrimond, carried. Michael Campbell: Yea, Nancy Castillo-McKinnis: Yea, Polly Farrimond: Yea, Rick Nagel: Yea, Diana Rasmussen: Yea, Dawn Watson: Yea, Rebecca Weathers: Yea

Director Watson had the pleasure of working with Roland Kretschmann on the bond committee and he has been a great supporter of our district and previously on the Budget Committee for many years.

I move to reappoint Roland Kretschmann to another 3-year term to the Budget Committee.

This motion, made by Rebecca Weathers and seconded by Rick Nagel, carried.

Michael Campbell: Yea, Nancy Castillo-McKinnis: Yea, Polly Farrimond: Yea, Rick Nagel: Yea, Diana Rasmussen: Yea, Dawn Watson: Yea, Rebecca Weathers: Yea

## I. Information and Discussion

### I.1. Legislative / OSBA Update

- Director Watson said that we had our legislative reception this Monday, and it went well. This year was our third year in having the reception and there was a lot of positive feedback. The legislators stayed on topic and asked questions to learn and understand about education.
- Director Farrimond shared her feedback and said that she appreciated the legislators saying that they have an open-door policy and how our testimony is so important.
- Supt. Barry thanked Dawn for her efforts in putting that on and coordinating all the logistics.
- Director Castillo-McKinnis thanked the GPSD for taking this on and sharing the responsibility.
- Director Weathers thanked Supt. Barry for taking the lead to speak to the group and the topics that he provided.
- Director Watson said that legislative days are next week and the agenda has been posted. The house has several topics that will be covered, including instructional time, academic calendars, poverty measures and restraint and seclusion.
- Senator Merkley will have his town hall on Sunday at 12:30 p.m. in Ashland at the high school in the gymnasium.
- Director Watson said that the OSBA Board will meet the weekend of the 23rd, and we now have Jay Chick from Rogue River and Nathan Seable from Grants Pass as our southern LPC members.
- Director Watson will be going to the conference in DC in January, and she will be representing southern Oregon and the whole state.

### I.2. Committee Reports – There were none.

### I.3. Audit Report

Director Rick Nagel provided the board with a summary from the audit committee meeting that was held on January 5th. Once again, the annual audit of our school district resulted in an Unmodified Report, which is the highest opinion possible. Mr. Nagel also provided a copy of the summary of the auditor's results, which commented that there were no findings on our financial statements or in our federal award findings and questioned costs.

### I.4. Criteria for Evaluating the Superintendent

Chair Campbell reminded the board that the criteria that we are looking to adopt is for next year's evaluation.

### I.5. First Student Renewal

- Supt. Barry said that he had asked for a two-year renewal and a five-year renewal. Yazmin Karabinas started putting dollar amounts into what it would mean next year and into the future and, quite simply, we can't afford what these rates say. Supt. Barry and Yazmin will put together something for our action item at the February 4 board meeting. If First Student can't agree on our terms, then we will need to go out for an RFP. Medford and Central Point districts also use First Student and Medford's contract

is up next year. Central Point's is up the following year, which is why we would want a shorter term to possibly go out for an RFP.

- Chair Campbell said that it appears as though it is essentially 30% over the five years and for the two-year option, it's 13.5% in year one and 5% in year two, which is basically 9% each year. Michael wanted to see itemization or justification for the large increases.
- Supt. Barry said that they listed fleet upgrades and competitive wages.

J. Recess – 7:08 – 7:15

K. Action Items

**K.1. Superintendent Recommendation for Nonrenewal of Probationary Teacher**

Chair Campbell said that the board met in executive session earlier where we heard confidential information on employment information relating to the superintendent's recommendation for a contract non-renewal for a probationary teacher. We are now considering the recommendation to non-renew the probationary teacher with the district. Is there a motion relating to the superintendent's recommendation?

I move to accept the Superintendent's recommendation and non-renew the probationary teacher's contract. This motion, made by Dawn Watson and seconded by Rebecca Weathers, Carried. Diana Rasmussen: Abstain, Michael Campbell: Yea, Nancy Castillo-McKinnis: Yea, Polly Farrimond: Yea, Rick Nagel: Yea, Dawn Watson: Yea, Rebecca Weathers: Yea;

**K.3. Board Policy BCF – Advisory Committees to the Board**

I move to approve changes to policy BCF - Advisory Committees to the Board as presented. This motion, made by Dawn Watson and seconded by Polly Farrimond, Carried. Michael Campbell: Yea, Nancy Castillo-McKinnis: Yea, Polly Farrimond: Yea, Rick Nagel: Yea, Diana Rasmussen: Yea, Dawn Watson: Yea, Rebecca Weathers: Yea

**K.4. Board Policy CEA - Educational Equity Advisory Committee**

I move to approve changes to policy CEA - Educational Equity Advisory Committee as presented. This motion, made by Dawn Watson and seconded by Rebecca Weathers, Carried. Michael Campbell: Yea, Nancy Castillo-McKinnis: Yea, Polly Farrimond: Yea, Rick Nagel: Yea, Diana Rasmussen: Yea, Dawn Watson: Yea, Rebecca Weathers: Yea

Director Castillo-McKinnis questioned some verbiage which led to a discussion.

**K.5. Board Policy DBEA – Budget Committee**

I move to approve changes to policy DBEA - Budget Committee. This motion, made by Rebecca Weathers and seconded by Polly Farrimond, Carried. Michael Campbell: Yea, Nancy Castillo-McKinnis: Yea, Polly Farrimond: Yea, Rick Nagel: Yea, Diana Rasmussen: Yea, Dawn Watson: Yea, Rebecca Weathers: Yea

**K.6. Board Policy GCBG/GDBD – Sick Leave – Personal Illness and Injury Leave**

I move to approve changes to policy GCBG/GDBD - Sick Leave - Personal Illness and Injury Leave as presented. This motion, made by Polly Farrimond and seconded by Nancy Castillo-McKinnis, Carried. Michael Campbell: Yea, Nancy Castillo-McKinnis: Yea, Polly Farrimond: Yea, Rick Nagel: Yea, Diana Rasmussen: Yea, Dawn Watson: Yea, Rebecca Weathers: Yea

**K.7. Board Policy GCBDE/GDBDE – Military Leave of Absence**

I move to approve changes to board policy GCBDE/GDBDE - Military Leave of Absence as presented. This motion, made by Rebecca Weathers and seconded by Rick Nagel, Carried. Michael Campbell: Yea, Nancy Castillo-McKinnis: Yea, Polly Farrimond: Yea, Rick Nagel: Yea, Diana Rasmussen: Yea, Dawn Watson: Yea, Rebecca Weathers: Yea

**K.8. Board Policy JHCA - Immunization, School sports Participation, concussions and Other Brain Injuries**

I move to approve changes to policy JHCA - Immunization, School sports Participation, concussions and Other Brain Injuries as presented. This motion, made by Nancy Castillo-McKinnis and seconded by Rebecca Weathers, Carried. Michael Campbell: Yea, Nancy Castillo-McKinnis: Yea, Polly Farrimond: Yea, Rick Nagel: Yea, Diana Rasmussen: Yea, Dawn Watson: Yea, Rebecca Weathers: Yea

**K.9. Board Policy JOA – Directory Information**

I move to approve changes to policy JOA - Directory Information as presented. This motion, made by Nancy Castillo-McKinnis and seconded by Polly Farrimond, Carried. Michael Campbell: Yea, Nancy Castillo-McKinnis: Yea, Polly Farrimond: Yea, Rick Nagel: Yea, Diana Rasmussen: Yea, Dawn Watson: Yea, Rebecca Weathers: Yea

**K.10. Board Policy LBEA – Denial for Virtual Public Charter School Student Enrollment**

I move to approve changes to policy LBEA - Denial for Virtual Public Charter School Student Enrollment as presented. This motion, made by Rebecca Weathers and seconded by Polly Farrimond, Carried. Michael Campbell: Yea, Nancy Castillo-McKinnis: Yea, Polly Farrimond: Yea, Rick Nagel: Yea, Diana Rasmussen: Yea, Dawn Watson: Yea, Rebecca Weathers: Yea

L. Review of the Next Meeting Agenda

M. Adjournment - The meeting adjourned at 7:30 p.m.

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Michael Campbell, Chair

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Brent Barry, Superintendent



# PHOENIX-TALENT SCHOOLS

EXCELLENCE *for* EVERYONE

Phoenix High School  
745 North Rose Street  
Phoenix, OR 97535

Joint Administrative Board Work Session  
Thursday, January 22, 2026 5:00 PM Pacific

Michael Campbell:	Present	Diana Rasmussen:	Present
Nancy Castillo-McKinnis:	Present	Dawn Watson:	Present
Polly Farrimond:	Present	Rebecca Weathers:	Present
Rick Nagel:	Present	Present: 7, Absent: 0	

A. Dinner for the Board and Administrative members 5:00 - 5:30 p.m.

B. Chair Michael Campbell opened the meeting at 5:35pm. Chair Campbell announced that Ms. Case's third grade class at Orchard Hill made some cards for the board in honor of Board Appreciation month.

### Action Item - Board Member Development Funds Request

Chair Campbell said that we do have an action item that is time sensitive and mentioned that we have enough left in our board travel/development fund with a balance of \$13,000 should the board wish to approve Nancy's request. Chair Campbell asked Nancy if she would like to share a little about the conference that she would like to attend.

Director Nancy Castillo-McKinnis shared that OALA is the Oregon Association of Latino Administrators and said that it is an opportunity for Latino administrators and persons of color in leadership to get together and learn and share about similar experiences, especially in school systems. They have inspiring speakers and it is a great opportunity to network and connect.

I move to approve the travel expense request for Director Nancy Castillo-McKinnis. This motion, made by Diana Rasmussen and seconded by Rick Nagel, Carried.

Michael Campbell: Yea, Nancy Castillo-McKinnis: Yea, Polly Farrimond: Yea, Rick Nagel: Yea, Diana Rasmussen: Yea, Dawn Watson: Yea, Rebecca Weathers: Yea

### C. Presentations/Questions

#### C.1. Introduction

Supt. Barry said that this is an annual event for our administrative team and our partners at Armadillo to share information with the board about things that are happening in their schools.

After each presentation, there were questions and discussions.

#### C.2. ACCS - Armadillo Community Charter School

Director Rachel Garner presented the following information:

- The main focus of ACCS is to create a sense of safety, significance, and belonging for all students.

- Specific statistics from years 23–24, 24–25, and 25–26 were shared, as well as information on graduation rates, project-based learning, and 25–26 initiatives.
- Southern Oregon Career Center provides a 1-year certified phlebotomist and ACCS has seven students who are participating in this program. They will all earn a certificate as a phlebotomist at the end of the school year.
- Graphics shown, indicated that math, reading, and writing scores improved significantly from years 23–24 to 24–25.
- In closing, student testimonials were shared as to why ACCS matters to them.

### **C.3. PTRA - Phoenix-Talent Rising Academy**

- Principal Aaron Santi presented data on PTRA's school structure, including staffing, class breakdowns, physical and virtual elements, and enrollment numbers.
- Mr. Santi shared reasons and benefits for students and families for choosing PTRA, reviewed the elementary and middle school programs and testing results data from school year 24–25 and school goals for 25–26.

### **C.4. OHES, PES, TES - Orchard Hill, Phoenix, and Talent Elementary Schools**

Principal Shawna Schleif from Phoenix Elementary School and Principal Heather Lowe from Talent Elementary School shared the following data on all three schools:

- School demographics & goal target trends.
- Inclusive classrooms guided by inclusive learning communities, including district-wide PLC (Professional Learning Community) teams and family engagement.
- The schools are continuing to focus on systems including the District ELA Implementation Leadership Team (DILT) & Math Implementation Leadership Team (MILT), including standards of practice, Multi-Tiered Systems of Support (MTSS) handbook, and professional development.

### **C.5. Recess - 7:10 - 7:20**

### **C.6. TMS - Talent Middle School**

Principal Casey Olmstead presented information including the following:

- Student demographics, testing diagnostics comparing fall of 24–25 results with fall of 25–26, attendance rates for 25–26, counseling support for Tier 1 (core instruction), Tier 2 (targeted, time-bound supports) and Tier 3 (intensive supports) and other programs and interventions.
- The focus for TMS on instruction to increase student learning includes:
  - Using district adopted curriculum
  - Observations and intentional feedback
  - Building up instructional leaders to support teaching teams
  - More intentionality around math intervention within our Bulldog Block classes
  - Focus on writing and foundational reading skills
  - Building motivation around grades and attendance
- Mr. Olmstead spoke about the TMS daily schedule, which includes a focus on math, literacy, and enrichment; clubs and extracurricular; ending his presentation on family

engagement, MTSS (Multi-Tiered Systems of Support) / SST (student support team), ASAP (after school academic program), and their new attendance system.

### **C.7. PHS - Phoenix High School**

Principal Kalin Cross's presentation included information on the following topics:

- District-aligned strategic priorities:
  - Attendance and engagement, on-track progress to graduation, instructional coherence/anchors of learning, and instructional playbook using high leverage strategies.
- Student engagement, voice and belonging
  - Student leadership, school spirit, student choice and ownership.

### **C.8. Summary**

Chair Campbell thanked all the administrative team for their time, their hearts for our students and for each other, and for wonderful presentations.

Supt. Barry said that what you heard tonight from these amazing leaders is there's a connection to the district strategic plan. I'm very proud of, and grateful for this team. Supt. Barry thanked the board for continuing this practice, continuing to listen and show up, and continuing to ask questions.

### **C.9. Adjournment** – The meeting was adjourned at 8:30 PM

To see the presentations and hear discussions, please see the video from the following link:

<https://www.youtube.com/watch?v=nTgO7nhHxuc&list=PLIOjOurYx6eM6n7HRgII0vyISI6sHZ94D&index=1>

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Michael Campbell, Chair

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Brent Barry, Superintendent



**2026-2027**

# Local Service Plan

**Dr. Mark Angle-Hobson**  
Superintendent

**District  
Office**  
5465 S. Pacific Hwy.  
Phoenix, OR 97535

**Douglas County  
Regional Office**  
90 NW Glenhart Ave.  
Winston, OR 97496

**Grants Pass  
Regional Office**  
550 SW 6<sup>th</sup> St.  
Grants Pass, OR 97526

**Klamath Falls  
Regional Office**  
2685 Foothills Blvd.  
Klamath Falls, OR 97603

**Operations  
Center**  
101 N. Grape St.  
Medford, OR 97501



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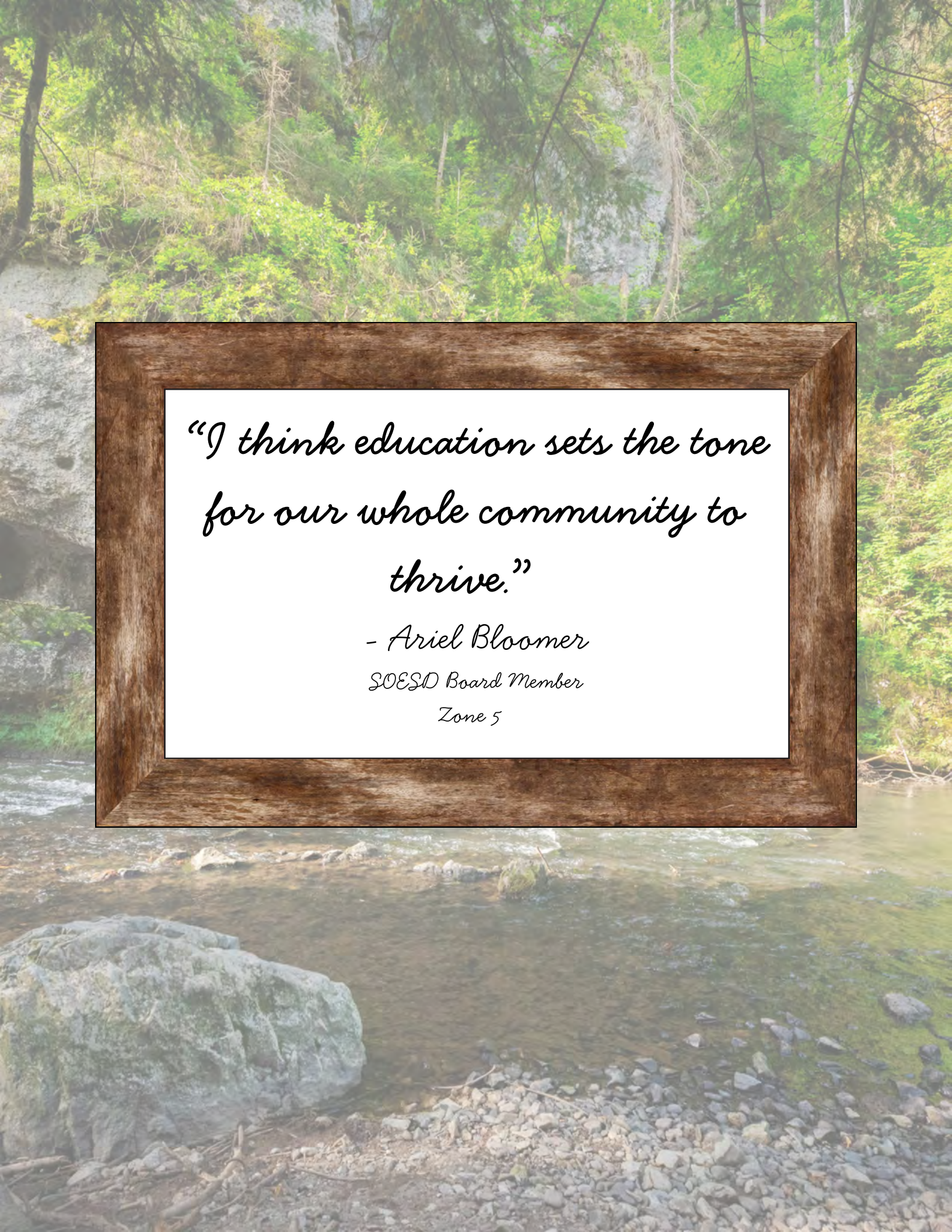
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A scenic background of a forest with a river and a wooden frame containing text. The frame is made of dark, weathered wood and is centered on the page. The text inside the frame is in a cursive font. The background shows a river with rocks and a forest of evergreen trees.

*“I think education sets the tone  
for our whole community to  
thrive.”*

*- Ariel Bloomer  
SOESD Board Member  
Zone 5*



# Introduction



**WHO**

**are we?**



# Dear Community

## Dear Board Members, Superintendents and Constituents:

Southern Oregon Education Service District (SOESD) serves children, families, educators, and communities within the ancestral homelands of the Shasta, Takelma, Latgawa, Klamath, Modoc, and Yahooksin-Paiute peoples. As the largest geographic region within Oregon's 19-ESD network, our 13 component districts span Jackson, Josephine, and Klamath Counties—an area roughly the size of the state of Massachusetts. Beyond our tri-county region, SOESD also partners to provide select services in Douglas and Lake Counties.

This Local Service Plan (LSP) outlines the services available across our region, the process and timeline through which component districts select those services, and a snapshot of the budget and staffing required to deliver them.

At the heart of this work is a people-first commitment. By centering our efforts on relationships and responsiveness, SOESD ensures that our specialized services support children, families, and educators in ways that allow them, and our own staff, to thrive.

In addition to the LSP, this document includes the Student Success Act (SSA) Comprehensive Support Plan (CSP), which assists districts with the development and implementation of their Student Investment Account (SIA) plans. Together, these plans reflect our region's shared dedication to meaningful, equitable, and sustainable improvement in service to all students.

As we look ahead, I am inspired by the strength and collaboration that define Southern Oregon. The challenges before us are real, but so are our collective talents, creativity, and compassion. Together, with clarity of purpose and shared commitment, we will continue to innovate, build belonging, and deliver exceptional services that make a lasting difference for the students and communities we serve.

Respectfully,

A handwritten signature in blue ink that reads "Mark Angle-Hobson" with "ED.D." printed in small letters below the name.

Mark Angle-Hobson, Ed.D.  
Superintendent

# Our Region

Southern Oregon Counties: Cities & Component Districts

*\*Data from the 2024-25 school year*

## Josephine County

Grants Pass  
Cave Junction  
Selma  
Williams  
Kerby  
O'Brien  
Takilma  
Redwood  
New Hope  
Wolf Creek



**2 Districts**  
**9,911 Students**

*1,641 square miles*

**Three Rivers School District**  
**Grants Pass School District**

18 Schools - 4,440 Students  
11 Schools - 5,726 Students



## Jackson County

Jacksonville  
Medford  
Central Point  
Ashland  
Eagle Point  
Gold Hill  
White City  
Phoenix  
Talent  
Shady Cove  
Rogue River  
Butte Falls  
Prospect



**9 Districts**  
**28,493 Students**

*2,802 square miles*

**Medford School District**  
**Eagle Point School District**  
**Central Point School District**  
**Ashland School District**  
**Phoenix-Talent School District**  
**Rogue River School District**  
**Prospect School District**  
**Butte Falls School District**  
**Pinehurst School District**

25 Schools - 13,786 Students  
11 Schools - 4,066 Students  
9 Schools - 4,773 Students  
9 Schools - 2,549 Students  
6 Schools - 2,230 Students  
4 Schools - 1,071 Students  
2 Schools - 233 Students  
2 Schools - 119 Students  
1 School - 8 Students



## Klamath County

Klamath Falls  
Chiloquin  
Bonanza  
Sprague River  
Bly  
Keno  
Beatty  
Merrill  
Chemult  
Malin  
Gilchrist  
Crescent



**2 Districts**  
**9,713 Students**

*6,136 square miles*

**Klamath County School District**  
**Klamath Falls City Schools**

22 Schools - 7,000 Students  
9 Schools - 2,723 Students



# Our Board of Directors



Ana Mannenbach - Chair  
Zone 9 - Butte Falls/Eagle Point/Prospect  
2023-2027



Richie Owens - Vice Chair  
Zone 7 - Medford  
2025-2029



Ariel Bloomer  
Zone 5 - Ashland/Phoenix-Talent/Pinehurst  
2025-2029



Rebecca Mueller  
Zone 6 - Medford  
2025-2029



Mary Barton  
Zone 8 - Central Point/Rogue River  
2025-2029



Rhonda Lawrence  
Zone 2 - Three Rivers  
2025-2029



Jessie Hecocta  
Zone 4 - Klamath Falls  
2023-2027



Brian Clark  
Zone 1 - Grants Pass/Three Rivers  
2025-2029



Robert "Bob" Moore  
Zone 3 - Klamath County  
2023-2027

**Board of Directors**

Mary Barton Ariel Bloomer Brian Clark	Jessie Hecocata Rhonda Lawrence Ana Mannenbach	Bob Moore Rebecca Mueller Richard Owens
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**Superintendent**  
Dr. Mark Angle-Hobson

**Executive Assistant to the Superintendent & Board Secretary:**  
Liz Littleton

Auditing Services  
Legal Services  
Insurance Services

**Business Office**  
Jeanetta Woodside,  
Chief Financial Officer/Deputy Clerk

**Services:**  
Finances  
Homeschool  
Logistics

**Manager:**  
Colton Cochran  
District Controller

**Confidential Administrative Assistant:**  
Crystal Salas

**Technology Services**  
Tom Bigboy  
Chief information Officer

**Services:**  
Computer Information Services  
Electronic Services  
Network Services

**Manager:**  
Israel Mathewson  
Technology Manager

**Human Resources**  
Ryan Swearingen,  
Chief Human Resources Officer

**Services:**  
Benefits  
Payroll  
Staffing  
Substitute Services

**Manager:**  
Stephanie Cossey,  
Program Manager

**Confidential Staff:**  
Bobbi Charley,  
HR Specialist  
Wendy Darrough,  
HR Specialist

**Communications and Partnerships (CaP)**  
Erin Green,  
Coordinator

**Programs:**  
Klamath Promise  
Southern Oregon Success (SORS)  
Southern Oregon Early Learning Services (SOELS)  
Childcare Resource Network(CCRN)  
Family Support and Connections (FS&C)

**Managers:**  
Cynthia Anderson  
Eva Skuratowicz  
Jessie McClung  
Peter Buckley  
Rene' Brandon

**Assistant Superintendent**  
Kylee Harrison

**Cabinet**

**Administrative Team**

**School Improvement Division**

**Integrated Instruction**  
Aaron Cooke,  
Coordinator

**Programs:**  
Curriculum, Instruction, & Assessment  
Instructional Technology  
Library/Media  
Apprenticeships  
Regional Educator Network  
Mentoring

**Focal Student Groups**  
Andrea Townsend,  
Coordinator

**Programs:**  
Equity Collaborative  
English learners  
Indian Education  
Migrant Education  
LGBTQ2SIA+

**Managers:**  
Elizabeth Prusko

**Student Engagement**  
Brad Capener,  
Coordinator

**Programs:**  
Career Connected Learning (CCL)  
College & Career (CC4A)/STE(A)M  
Attendance  
Student Success Act  
Emergency Management

**Managers:**  
Karla Clark  
Brian Robin

**Student Services Division**

**Deaf/Hard of Hearing & Vision Services**  
Jaime Banks,  
Coordinator

**Programs:**  
Audiology  
Deaf and Hard of Hearing  
Visual Impairment

**Managers:**  
Eric Crook

**Early Intervention/ ECSE**  
Shannon Bilbao,  
Coordinator

**Programs:**  
EI/ECSE

Josephine County LRAC  
Ramsey Learning Center  
Inclusion Project

**Managers:**  
Louise Horn

**Autism & STEPS**  
Nikki Donnelly,  
Coordinator

**Programs:**  
Autism  
STEPS Plus  
STEPS Care

**Day Treatment/ Residential, Nursing, & Speech Services**  
Diane Dunas,  
Coordinator

**Programs:**  
Long Term Care and Treatment (LTCT)  
Speech Language Services  
School Nursing Services

**Orthopedic Impairment & Youth Employment**  
Andrée Johnson,  
Coordinator

**Programs:**  
Orthopedic Impairment  
Youth Employment Services  
Regional Technical Assistance Program

**Student Behavioral Health & Wellness**  
Sandy Stack,  
Coordinator

**Programs:**  
Student Behavioral Health & Wellness (SBHW)  
Recovery Supports  
School Safety and Prevention Systems

**Psychology & Autism**  
Agnes Lee-Wolfe,  
Coordinator

**Programs:**  
Psychological Services  
Traumatic Brain Injury Services  
Autism

# Our Compass

Across Oregon, we are navigating a time of economic uncertainty that touches every corner of our education system. Budgets are tightening, needs are growing, and it's natural for all of us to feel the weight of those challenges. Yet, moments like this also remind us why our partnership matters most.

When ESDs and component districts work together, we create efficiencies and solutions that none of us could achieve alone. Collaboration allows us to pool expertise, share resources, and expand opportunities for students and educators across our region. It transforms scarcity into creativity and challenge into possibility.

At SOESD, we are committed to finding new ways to stretch every dollar while keeping people at the center of our decisions. The strength of our regional network—built on trust, communication, and shared purpose—remains one of our greatest assets.

As part of that commitment, we have implemented several initiatives to strengthen our systems, modernize our operations, and enhance transparency. Since July, SOESD has launched a refreshed website and inclusive letterhead to better reflect our region and improve communication; restructured our administrative team to increase collaboration and reduce costs; and created new opportunities for engagement through the Blueprint & Beyond newsletters, Coffee with Cabinet, and a virtual question box. We have also onboarded new leadership and board members, completed a policy rewrite, and initiated an inclusive strategic planning process to guide our shared work for the years ahead.

These efforts, paired with facility improvements, technology upgrades, and a focus on human-centered culture, are designed to ensure that every investment we make directly supports the students, families, and educators we serve.

As we look ahead, we are confident that by staying connected, transparent, and united around our shared mission, we will not only weather this period of uncertainty but emerge stronger and more aligned in our service to children and families.

Thank you for your partnership and your continued leadership in your schools and communities. Together, we can ensure that Southern Oregon remains a place where collaboration drives innovation and every student has the opportunity to thrive.



# Our Lexicon

## 1. Agency

Southern Oregon Education Service District is the **agency**. An agency is the entire organization — encompassing all departments, programs and services within SOESD.

## 2. Divisions

SOESD is an agency made up of four **divisions** that meet our statutorily required obligations: Administration, School Improvement, Student Services and Technology. Together, these divisions support our region through integrated services, programs, and partnerships.

## 3. Departments

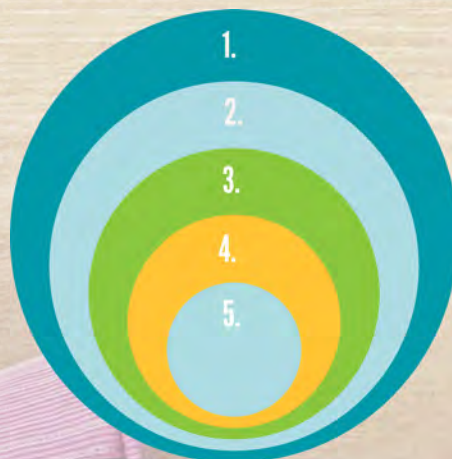
Within each division are **departments**. At SOESD, departments include areas such as Early Childhood Services, Focal Student Groups, Student Engagement, Student Behavioral Health and Wellness and more. Departments focus on specific areas of service and operations that contribute to the agency's overall mission.

## 4. Programs

Each department oversees specific **programs**. These programs deliver specialized support to meet the diverse needs of our students and communities. As an example, included within the Focal Student Groups department are Indian Education and Migrant Education (and others). Some programs, like Southern Oregon Early Learning Hub, are governed by separate entities, with SOESD serving in a fiscal backbone or support role.

## 5. Projects

**Projects** are specific bodies of work within programs that help achieve specific goals. They turn program plans into real actions and results.





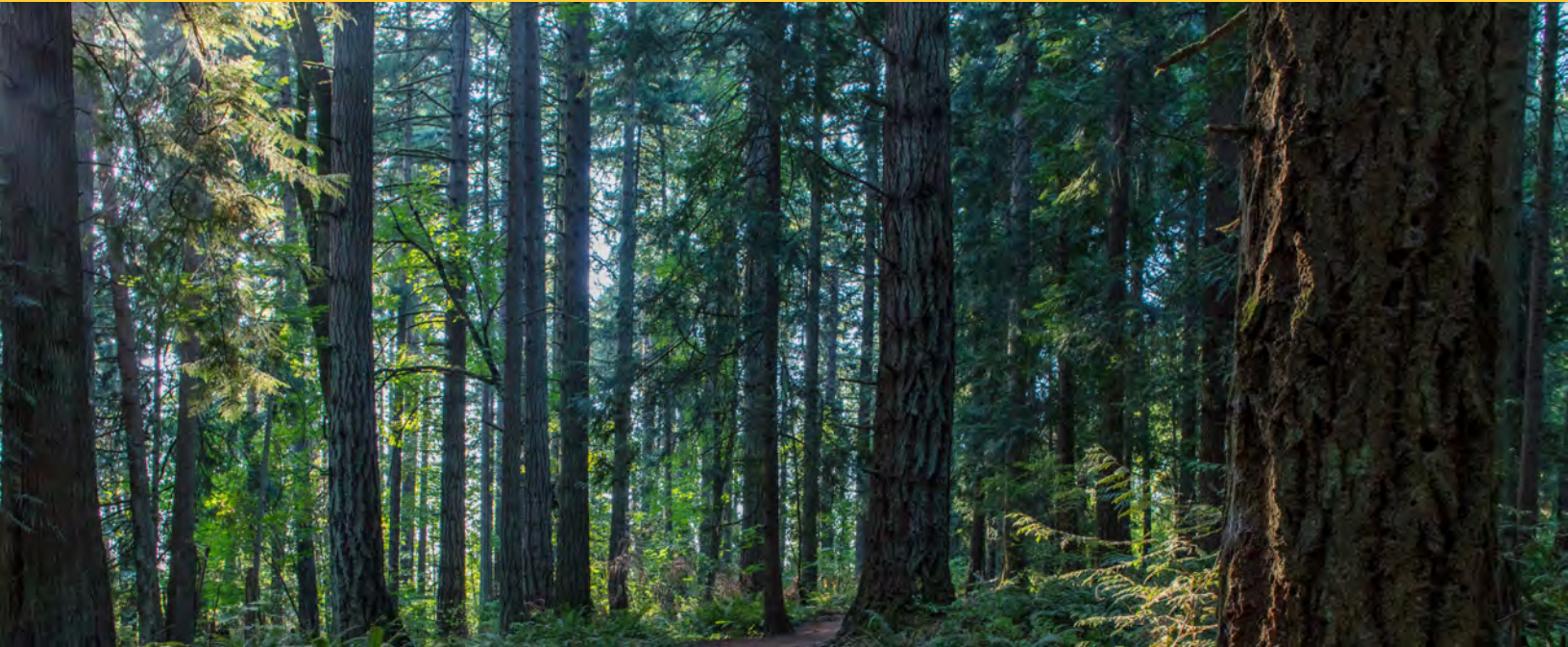
*“What I love most about my work at SOESD is the opportunity to collaborate with key leaders from across our beautiful Southern Oregon landscape, embracing the unique culture and perspective of the communities they serve. The strength of our unified efforts reflects in the resources and opportunities brought forward within our region, impacting the students, families, and teachers we serve.”*

*- Kylee Harrison  
SOESD  
Assistant Superintendent*



# Section I:

# Laying the Foundation



**WHAT**

guides our  
work?



# LSP Scope & Requirements

## Local Service Plan: Scope



## Local Service Plan:

## Adoption & Approval Requirements

ORS 334.175

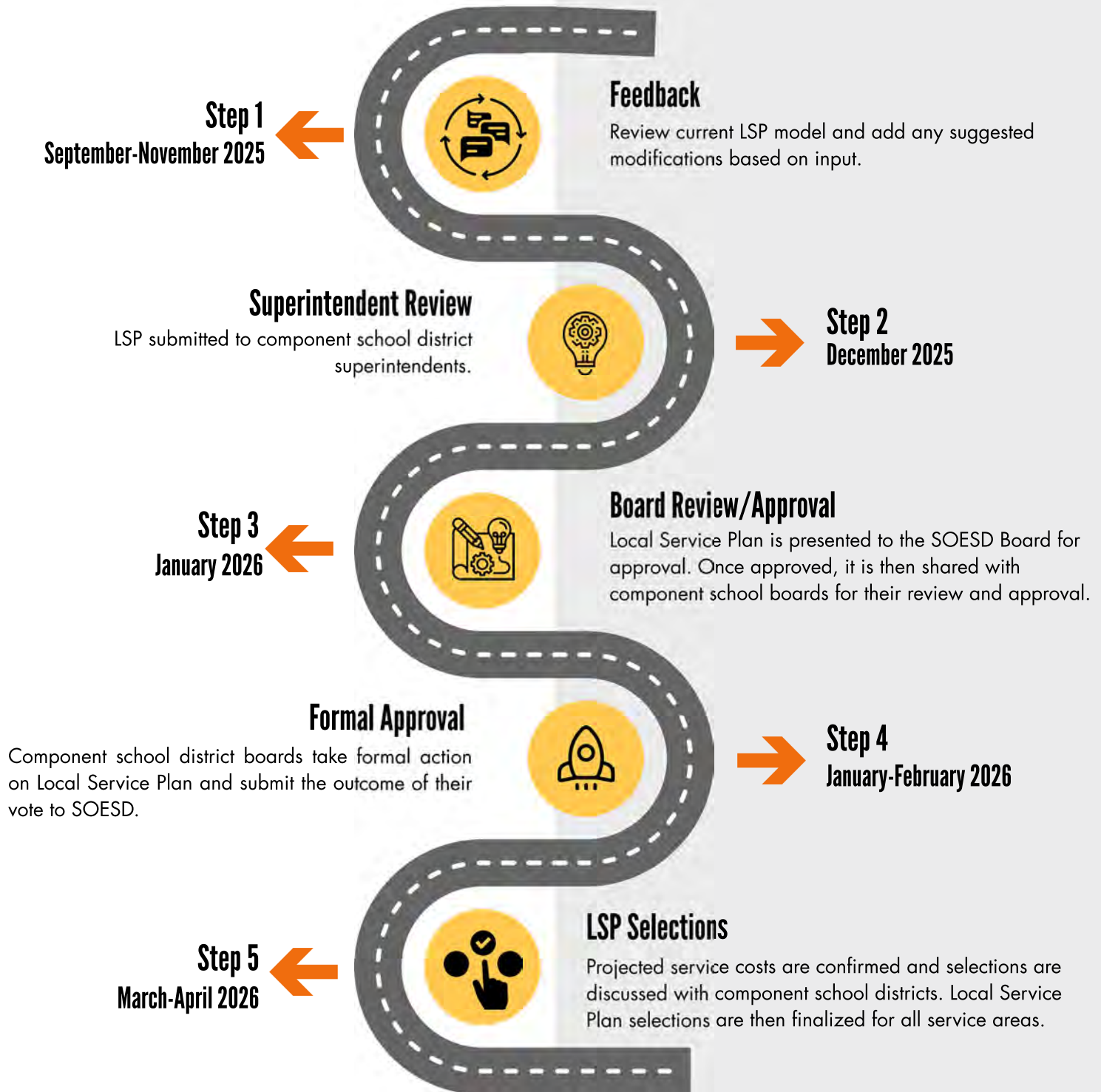
Each year, an Education Service District's (ESD) Local Service Plan must be:

1. Adopted by the ESD Board
2. Approved on or before March 1 by a resolution of two-thirds of the component school districts that collectively serve a majority of the pupils within the ESD's region.

*\*While not statutorily required, SOESD's practice is for the first draft of the Local Service Plan—presented to superintendents before winter break—to reflect feedback gathered from various constituent groups throughout the fall.*



# LSP Timeline



# Financial Summary

## State School Fund

4.5% of the State School Fund (SSF) is set aside to fund Oregon's 19 ESDs. SOESD receives approximately 9% of this amount based on the region's proportional ADM.

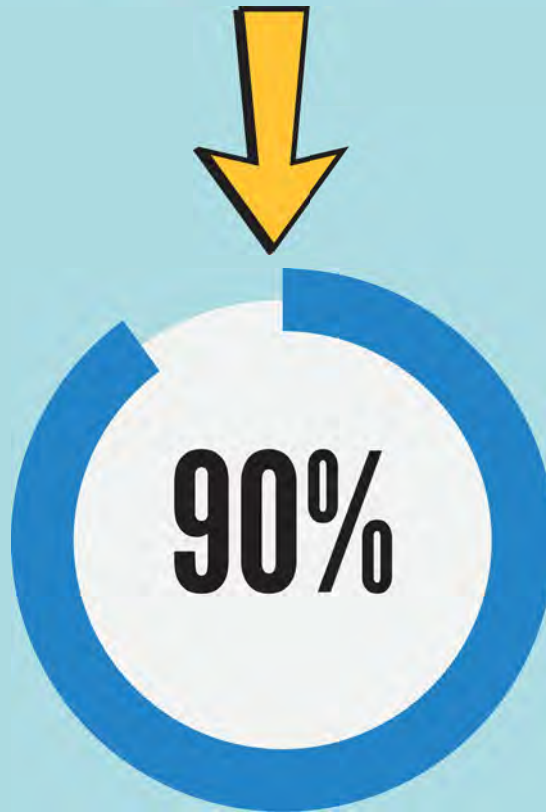
The ESD funding formula includes property taxes and state income taxes.



For the 2025-26 fiscal year, SOESD has budgeted \$15,103,846 from state sources and \$15,254,434 from local property taxes. These combined amounts equal \$30,358,280 and, when added to the remaining budgeted revenues, total \$32,152,993 of general fund resources.

## State School Fund Expenditure Requirements

State law requires ESDs to expend at least 90% of their State School Fund revenue for services approved by component districts in the Local Service Plan.



*No more than 10% is retained to support SOESD's infrastructure and operations.*



# Financial Summary (Cont.)

## Overview

Southern Oregon ESD offers a range of services to our component districts, organized into the four core service areas outlined in ORS 334.175. We maintain strong, collaborative relationships with our districts, reviewing services annually to meet evolving needs. The 2026–2027 Local Service Plan includes all required core services, plus additional services identified by our districts.

## Agreements

**District Allocations:** 90% of State School Fund goes directly to districts based on last year's ADMr.

**Essential Core:** About 5% supports small-districts, STEPS Plus classrooms, and required ESD leadership in school improvement, special education, and technology.

**Menu Services:** Districts may utilize their allocations to choose from a menu of services, including administration, school improvement, student services, and technology. Some selections are yearly; others are on a three-year rolling plan.

**Billing:** Services are billed at actual cost at year-end. Unused funds are returned; extra use is billed.

**Service Commitment:** Districts agree to use at least 30% of their allocation for SOESD services to ensure quality and stability.

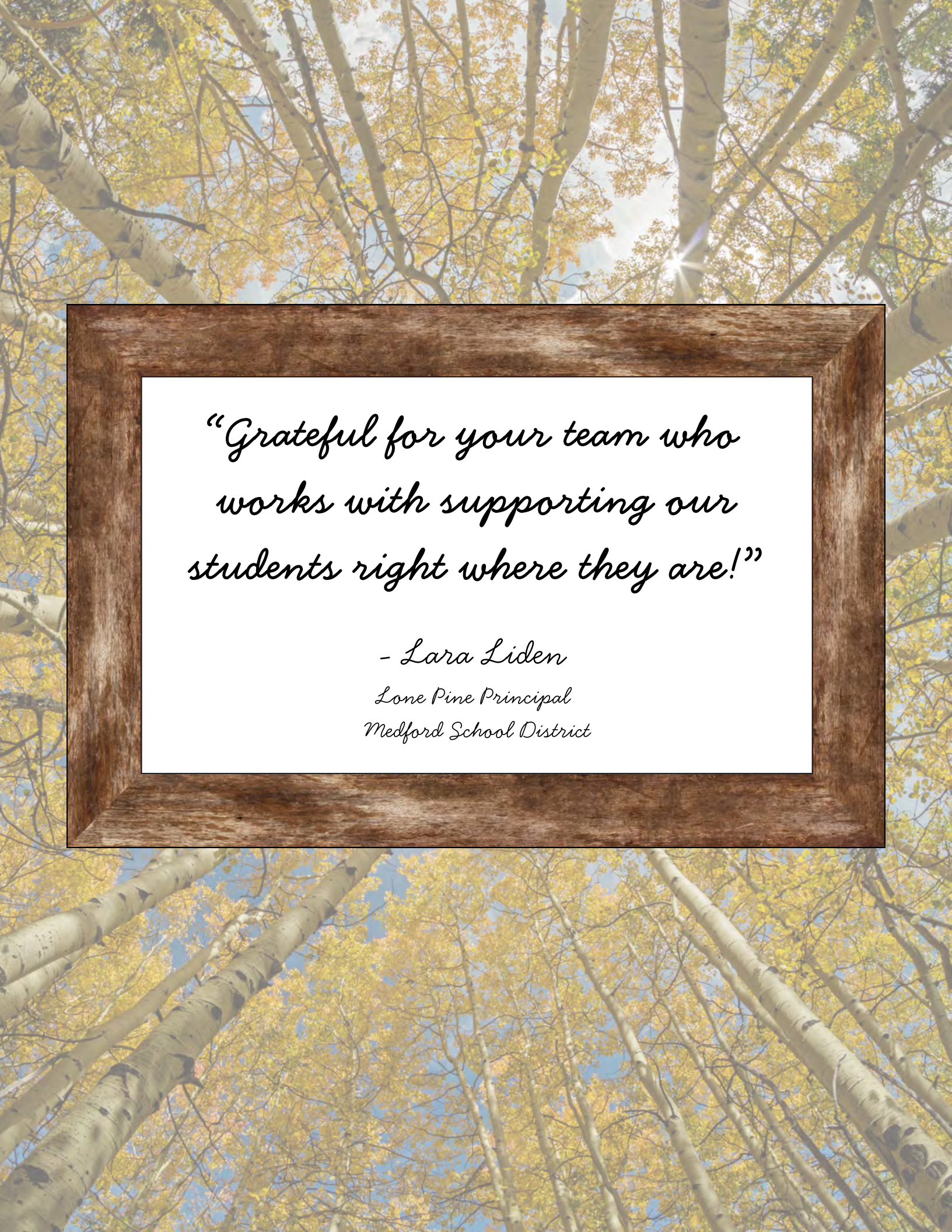
**Extra Agreements:** Additional agreements support needs beyond base services.

**Optional Services:** Fee-for-service opportunities like workshops and other programs are available.

**Entrepreneurial Fees:** Fees for non-district organizations support programs benefiting our districts.

90% of  
SOESD's  
share of the  
State  
School Fund





*“Grateful for your team who works with supporting our students right where they are!”*

*- Lara Liden  
Lone Pine Principal  
Medford School District*



# Section II:

# Local Service Plan



**WHAT**

do we do?



# Division Funding Overview

*\*Based on 2025-26 Budget*

Service	Page	Budget	LSP-Funded FTE	Non LSP-Funded FTE
Administration	12	\$1,415,932	5.25	13.5
School Improvement	14	\$1,644,614	6.8	56.5
Student Services	17	\$12,759,535	89.5	105.5
Technology	20	\$2,304,242	13.75	0



# Administration Division

Supporting Schools. Empowering People.  
Strengthening Communities.




Contact  
US

At SOESD, our Administration Division exists to make the work of schools and educators smoother, more equitable, and more connected. Every day, we partner with districts so students can access opportunity, staff have the tools and guidance they need, and leaders can focus on what matters most—teaching, learning, and helping communities thrive. From managing payroll and substitutes, to coordinating civil rights compliance, to delivering materials across districts, our work is guided by one principle: people first. When staff, families, and students are supported, the whole community flourishes.

 [administration@soesd.k12.or.us](mailto:administration@soesd.k12.or.us)

 [soesd.k12.or.us](http://soesd.k12.or.us)

 (541) 776-8590

## Administrative Leadership

Mark Angle-Hobson	Ryan Swearingen
Kylee Harrison	Stephanie Cossey
Jeanetta Woodside	Tom Bigboy
Colton Cochran	Erin Green

# Administration, Business Services, & Human Resources

\*Counties listed represent service utilization in 2025–26

## Services:



**Civil Rights Coordination:** SOESD can serve as a district civil rights coordinator under HB 2881, handling compliance, training, prevention, and discrimination investigations with private investigators. *Jackson, Josephine, & Klamath Counties*

**Courier:** The Courier handles pick-up and delivery of materials and equipment from the STEM High Tech Tools Lending Library and Electronics Repair program, as well as inter- and intra-district mail. *Jackson, Josephine, & Klamath Counties*

**Medicaid Billing:** School districts in the Medicaid Billing program are reimbursed through Medicaid Administrative Claiming (MAC), which covers K–12 staff work already being performed. *Jackson, Josephine, & Klamath Counties*

**Substitute Management:** SOESD provides recruiting, hiring, training, assignment, payroll, and substitute management for licensed teachers using the Absence Management System to support districts during staff absences. *Jackson & Josephine Counties*

## Services Provided at No Additional Charge

**Job-Alike Collaboration and Support:** Regular regional meetings convened by SOESD leadership with job-alike groups to enhance educational opportunities, foster collaboration, and increase collective efficacy for staff and students across the region.

- Superintendents Meeting
- Business Managers Meeting
- Human Resources Meeting
- Communications Managers Meeting

*Jackson, Josephine, & Klamath Counties*

**Home Schooling:** Centralized registration for students ages 6–18 who live in Jackson, Josephine, or Klamath counties and are not enrolled in a public or private school.

*Jackson, Josephine, & Klamath Counties*






# School Improvement Division

## Empowering Learners, Leaders, and Communities



Contact Us

School Improvement Services partners with schools to help every learner thrive—from early learning through post-secondary success. Our work connects classrooms and communities by coordinating regional collaboration, promoting kindergarten readiness, and managing grants that open doors to meaningful career pathways. We provide professional learning and technical assistance that strengthen instruction, foster belonging and wellness, and remove barriers to learning. Through these efforts, we help schools nurture achievement, improve attendance, and support every student in reaching graduation ready for the future they choose.

-  [school\\_improvement@soesd.k12.or.us](mailto:school_improvement@soesd.k12.or.us)
-  [soesd.k12.or.us/school\\_improvement](https://soesd.k12.or.us/school_improvement)
-  (541) 776-8590

### School Improvement Coordinators:

Aaron Cooke  
Andrea Townsend  
Brad Capener

# School Improvement Services

\*Counties listed represent service utilization in 2025–26



## Programs & Services:



**Career Technical Education (CTE):** The Career and Technical Education (CTE) program connects students to real-world careers by aligning learning with industry needs. The team facilitates the Federal Carl D. Perkins consortium grant and the Southern Oregon CTE Consortium (SOCTEC), partnering with schools, colleges, and employers to provide hands-on experience, college credit, and career pathways to success. *Jackson, Josephine, & Klamath Counties*

**College and Career/STEAM Hub:** College and Career Services connects schools, higher education, industry, and community partners to provide hands-on, career-focused learning, supported by dual credit, CTE, and the regional STEAM Hub. Grant funding supports these programs, including STEAM specialists who support educators with STEM integration and co-teaching, to expand access and opportunities across the region. *Jackson, Josephine, & Klamath Counties*



**Curriculum, Instruction, and Assessment:** SOESD partners with schools to enhance teaching and learning through consultation, professional development, and aligned curriculum, helping educators create engaging classrooms where every student can thrive. *Jackson, Josephine, & Klamath Counties*

**Division 22 Library Services:** SOESD employs TSPC-licensed librarians who provide virtual or hybrid support to district library staff, assisting with Division-22 compliance, resources, cataloging, and an annual regional library symposium. *Jackson, Josephine, & Klamath Counties*

**Mentoring New Teachers and Administrators:** SOESD mentors new teachers and administrators in their critical first years, supporting effective instruction, assessment, and culturally responsive teaching. By strengthening educators early, the program boosts teacher retention and student success. *Jackson, Josephine, & Klamath Counties*



**Migrant Education/Indian Education/EL/LGBTQ2SIA+:** Districts can join consortia that provide access to federal and state grants supporting educational and culturally related needs. The Title IC–funded Migrant Education Program offers academic, social-emotional, and family support— including bilingual preschool, after-school and summer programs, and mental health and graduation assistance. Funded by the Student Success Grant, LGBTQ2SIA+ services support GSA clubs, the Unity Conference, inclusive literature, and safe-space initiatives. Title VI–funded Indian Education provides cultural enrichment, academic support, and educator training. English Learner (EL) services offer professional development, technical assistance, and Title III grant management to ensure equitable learning for multilingual students. *Jackson, Josephine, & Klamath Counties*

**Regional Achievement Collaboratives:** Southern Oregon Success in Jackson and Josephine Counties and Klamath Promise in Klamath County are the only regional organizations that connect education, health care, mental health care, human services, workforce development and public safety to support student success from early learning through career readiness. Through training on ACEs and trauma-informed practices, as well as workgroups focused on Kindergarten readiness, navigation of services and alignment of resources, these initiatives strengthen communities, and engage partners to promote student achievement.

*Jackson, Josephine, & Klamath Counties*



# School Improvement Services (Cont.)

## Services Provided at No Additional Charge

**Child Care Resource Network:** The Child Care Resource Network supports the Southern Oregon Early Learning Hub by improving child care quality through QRIS, provider trainings, business and consumer education, and family support connections. *Jackson & Josephine Counties*

**Curriculum Directors Meetings:** SOESD facilitates meetings throughout the year of area curriculum directors to enhance educational opportunities for students in the region. *Jackson, Josephine, & Klamath Counties*

**Family Support and Connections (FS&C):** Family Support and Connections is a statewide program that pairs families with local advocates to overcome barriers, build personalized plans, and support long-term success. *Jackson & Josephine Counties*

**Focal Student Groups Regional Meeting:** A meeting for coordinators and district leaders in EL, Migrant Education, and Equity to collaborate, discuss new ODE policies and changes, share supports, explore implementation strategies, and develop solutions together. *Jackson, Josephine, & Klamath Counties*

**Grow Your Own (GYO):** Encompasses aid for cadet teachers, upskilling of current educators, and the Registered Apprenticeship and Teaching Program. These programs are designed as supports for novice educators and pathway creation for educational licensure and certification. *Jackson, Josephine, & Klamath Counties*




**Regional Educator Network:** SOESD coordinates SOREN to support educators throughout their careers, promoting safe, equitable classrooms through sustainable, locally responsive professional learning. *Jackson, Josephine, & Klamath Counties*

**Student Success Act:** Under the Student Success Act, SOESD provides districts with technical assistance and professional learning, collaborating with teams to enhance initiative implementation and impact. *Jackson, Josephine, & Klamath Counties*

**Southern Oregon Early Learning Services:** The Early Learning Hub broadens resources for underserved children and families, aligning programs with their needs through collaboration with schools, health providers, and community partners. *Jackson, Josephine, & Klamath Counties*

**Suicide Prevention and Threat Assessment:** SOESD meets districts and communities where they are in supporting suicide prevention and response through a range of services, including threat assessment training and technical assistance, support and leadership on county-level Threat Assessment teams, suicide prevention training, technical assistance, and systems development, as well as suicide postvention/response training and direct support through the regional Flight Team. *Jackson, Josephine, & Klamath Counties*





*“My mentor helped me find joy  
and love in teaching little people.”*

*-Teacher + Mentee,  
SOREN Mentoring Project*

# Student Services Division

## Supporting Every Learner, Every Step of the Way



The SOESD Student Services Division supports every learner by providing evaluation, consultation, and direct special education services tailored to students with disabilities through an Individualized Education Program (IEP) and/or an Individual Family Service Plan (IFSP). With programs available across Jackson, Josephine, and Klamath counties—and select services in Douglas and Lake counties—SOESD empowers students to reach their full potential. Additionally, the OR Project curriculum extends this impact globally, supporting children who are visually impaired or blind around the world.

Contact  
us



[student\\_services@soesd.k12.or.us](mailto:student_services@soesd.k12.or.us)



[soesd.k12.or.us/special\\_education](https://soesd.k12.or.us/special_education)



(541) 776-8590

### Student Services Coordinators:

Andrée Johnson  
Diane Dunas  
Jaime Banks

Nikki Donnelly  
Sandy Stack  
Shannon Bilbao

# Student Services

\*Counties listed represent service utilization in 2025-26

## Programs & Services:



**Audiology:** Comprehensive hearing evaluations for children from early childhood through high school including a full range of diagnostic assessments and hearing assistive technology resources. *Jackson, Josephine, & Klamath Counties*

**ASL Interpreting & Educational Assistance with Basic Sign Skills Services:** ASL Interpreters and Educational Assistants with Basic Sign Language provide in-class and extracurricular support across the 5-county region, removing communication barriers so DHH students can fully access their environment, connect with peers and staff, and participate inclusively in school life. *Jackson, Josephine, Klamath, Douglas, & Lake Counties*

**Assistive Technology:** SOESD offers a library of assistive technology for loan and provides support in researching and obtaining tools to meet the needs of learners across Southern Oregon. *Jackson, Josephine, & Klamath Counties*

**Autism Services:** SOESD's Autism Services team partners with educators, families, and districts to support students with Autism through classroom consultation, professional development, and collaborative problem-solving. *Jackson, Josephine, Klamath, Douglas, & Lake Counties*



**Behavioral and Mental Health:** Provides multi-tiered mental health and behavioral support for students, along with training, consultation, and coaching for staff to promote wellbeing, self-regulation, and behavioral success. *Jackson, Josephine, & Klamath Counties*

**Braille/Compensatory Services:** Provide Braille, adapted material production and compensatory services to support children who are blind, low vision or DeafBlind, from birth through age 21. *Jackson, Josephine, Klamath, Douglas, & Lake Counties*

**Evaluation Services - Early Intervention (EI) /Early Childhood Special Education (ECSE):** EI and ECSE in Josephine County provide evaluations for children 0-5 and support services for families and children with special needs. *Josephine County*

## Services Provided at No Additional Charge



**Early Intervention & Early Childhood Special Education Services:** Early Intervention (0-3) and Early Childhood Special Education (3-5) support students with developmental delays or disabilities, helping them build foundational skills, improving school readiness, and fostering strong partnerships with families and districts. *Josephine County*



**Long Term Care and Treatment (LTCT):** LTCT provides education for students placed in day or residential treatment programs, offering a therapeutic environment where children develop the skills and behaviors needed to thrive in non-institutional settings. *Jackson, Josephine, & Klamath Counties*

**Regional Crisis Response/Flight Team:** SOESD's Flight Team provides timely, trauma-informed crisis support to schools, assisting students and staff with grief, communications, and coordination with outside agencies to help communities navigate difficult events safely and supported. *Jackson, Josephine, & Klamath Counties*

**Regional Inclusive Services for Low Incidence Disabilities:** Serving as ODE's Region III contractor for Southern Oregon, SOESD provides special education services to children ages birth through 21 who experience deafness or hard of hearing, visual impairment, orthopedic impairment, autism, and traumatic brain injury across five counties. *Jackson, Josephine, Klamath, Douglas, & Lake Counties*



# Student Services

## Programs & Services:



**Oregon Project for Visually Impaired and Blind Preschool Children (OR Project):** The OR Project is a comprehensive assessment and curriculum for children ages 0–6 who are blind or visually impaired. *Jackson, Josephine, Klamath, Douglas, Lake Counties, & Available Worldwide*



**Orthopedic Impairment Services:** Occupational and Physical Therapists provide evaluation, consultation, and direct support to help students with orthopedic impairments fully access their learning environments. *Jackson, Josephine, Klamath, Douglas, & Lake Counties*

**Physical and Occupational Therapy (PT & OT):** Physical therapy supports postural and gross motor skills such as head control, sitting, and balance, while occupational therapy focuses on fine motor skills like grasping, manipulating, and coordinating two-handed activities. *Jackson, Josephine, & Klamath Counties*

**Psychological Services:** School Psychologists offer consultation for educators and families, along with evaluation and intervention services to support students' learning and wellbeing. *Jackson, Josephine, & Klamath Counties*

**School Nursing Services:** School nurses support students' health needs, from chronic conditions to specialized care, helping districts ensure safety, wellbeing, and compliance with state regulations. *Jackson & Josephine Counties*

**Special Education Automation Software (SEAS):** A fully web-based special education management system that helps districts efficiently manage IEPs, timelines, Medicaid claims, assessments, and other key components of special education programs. *Jackson, Josephine, & Klamath Counties*

**Speech and Language Services:** Provides direct and consultative support through evaluations, IEP collaboration, therapy, and co-teaching to strengthen students' communication, language development, and verbal fluency. *Jackson, Josephine, & Klamath Counties*



**STEPS CARE:** Serves students ages 5–21 with diverse and significant needs across learning, communication, movement, and health, including intellectual and developmental disabilities, orthopedic and neurological differences, and complex medical needs—through individualized instruction and supports that promote access, engagement, well-being, and independence. *Jackson & Josephine Counties*

**STEPS Plus:** Serves a distinct population of students who require intensive support for regulation, communication, and skill development, supported by robust environmental, instructional, and sensory/regulation strategies and a high adult-to-student ratio to access learning. *Jackson & Josephine Counties*

## Services Provided at No Additional Charge

**Regional Technical Assistance Provider (RTAP):** RTAP supports the understanding, development and delivery of high quality IEPs and other legally required Special Education processes. *Jackson, Josephine, & Klamath Counties*

**Special Education Directors Meetings:** SOESD hosts regular meetings for special education directors to share best practices, resources, and collaborate on solutions to support students and schools. *Jackson, Josephine, & Klamath Counties*

**Substance Use and Addiction Recovery Services:** This pilot program strengthens the region's capacity to support students with co-occurring behavioral health needs by providing school-based screening, early intervention, treatment, and recovery services for substance use and mental health concerns. *Jackson, Josephine, & Klamath Counties*

**Transition Network Facilitator – Region V:** The Transition Network Facilitator helps improve employment services for students with disabilities by coordinating Vocational Rehabilitation and local education agencies under the Workforce Innovation and Opportunity Act. *Jackson, Josephine, & Klamath Counties*

**Youth Employment Services:** Serves students ages 14–21 with disabilities eligible for special education, preparing them for employment or career-focused post-secondary education and training. *Jackson, Josephine, Klamath, Douglas, & Lake Counties*

*“As a board member and previous SOESD employee, I have a unique perspective on how this organization truly supports the whole child - from ensuring students have access to essential specialist services like PT, OT or Regional Supports for Low-Incidence disabilities, to providing critical resources that help our rural and underserved communities thrive.*

*The dedication I see from SOESD staff in delivering individualized supports and removing barriers to learning reminds me daily why our work matters. We’re not just supporting schools; we’re investing in the future of every child in Southern Oregon.”*

*- Ana Mannenbach*

*SOESD Board Chair*

*Zone 9*

# Technology Division


## People-First Technology For Learning and Connection




Contact  
us

The Technology Department exists to provide innovative, reliable, and secure technology solutions that put people first —empowering staff, students, and school communities. Combining leadership, expertise, and collaboration, the team works together to plan, implement, and maintain systems that support learning, communication, and the success of every individual across our region.

 [technology\\_services@soesd.k12.or.us](mailto:technology_services@soesd.k12.or.us)

 [soesd.k12.or.us/technology](https://soesd.k12.or.us/technology)

 (541) 776-8590

### Technology Leadership

Tom Bigboy  
Israel Mathewson

# Technology Services

\*Counties listed represent service utilization in 2025–26

## Programs & Services:



**Data Center Hosting:** Computer Information Services operates SOESD’s 24/7 regional data center, delivering reliable, cost-saving technology support for districts.

*Jackson, Josephine, & Klamath Counties*

**District Data Center Support:** System Analysts manage regional data centers to reduce costs, boost IT performance, and maximize uptime.

*Jackson, Josephine, & Klamath Counties*

**District Network Support/VoIP Services:** Network Analysts support the design, installation, and maintenance of networks, internet connectivity, security, access control, and VoIP systems.

*Jackson, Josephine, & Klamath Counties*

**Electronic Services:** Licensed electricians install and maintain networks, security systems, and instructional technology, while technicians repair devices such as iPads—all provided at reduced wholesale prices to stretch district resources.

*Jackson, Josephine, & Klamath Counties*

**Follett Destiny:** SOESD hosts Follett Destiny in SOESD’s regional data center, giving students and educators access to curated digital and print resources. Help Desk Software Suite.

*Jackson, Josephine, & Klamath Counties*

**Help Desk Software Suite:** Computer Information Services hosts the Region-Wide Help Desk, offering data tracking, asset management, remote support, and reporting for IT, print, and maintenance teams.

*Jackson, Josephine, & Klamath Counties*

**Infinite Visions Hosting:** SOESD supports Infinite Visions software in a cloud-hosted or on-premises environment at reduced costs, providing updates and technical support.

*Jackson, Josephine, & Klamath Counties*

**Internet Connectivity:** SOESD delivers cost-effective, reliable Internet with redundancy and Internet2 access, meeting regional bandwidth needs efficiently.

*Jackson, Josephine, & Klamath Counties*



### Professional Development Management

**(PDNetworks):** PDNetworks manages staff licensing, professional development, and training aligned with district and individual goals.

*Jackson, Josephine, & Klamath Counties*

**Software Development:** Software Developers build apps, websites, and data systems tailored to district learning and reporting needs.

*Jackson, Josephine, & Klamath Counties*

### Southern Oregon Regional Cybersecurity Program:

System Analysts protect districts from cyber threats and ensure secure systems with rapid incident response.

*Jackson, Josephine, & Klamath Counties*

## Services Provided at No Additional Charge

### Technology Director Meetings:

SOESD hosts annual meetings of area technology directors to enhance student learning opportunities.

*Jackson, Josephine, & Klamath Counties*



# Student Success Act (SSA) Comprehensive Support Plan (CSP)

## Supporting Achievement, Well-Being, and Equity




Contact  
us

The Student Success Act Comprehensive Support Plan helps districts put students first by closing academic gaps and strengthening behavioral and mental health supports. Funded through the Student Success Act, SOESD provides free and cost-based technical assistance that guides districts in designing and implementing evidence-based strategies to promote student achievement, well-being, and equity. By aligning with district Integrated Plans and coordinating resources like the Student Investment Account, these supports amplify impact, ensuring every student has the opportunity to thrive both in and out of the classroom.

 [tanya\\_frisendahl@soesd.k12.or.us](mailto:tanya_frisendahl@soesd.k12.or.us)

 [soesd.k12.or.us/ssa](https://soesd.k12.or.us/ssa)

 (541) 776-8590

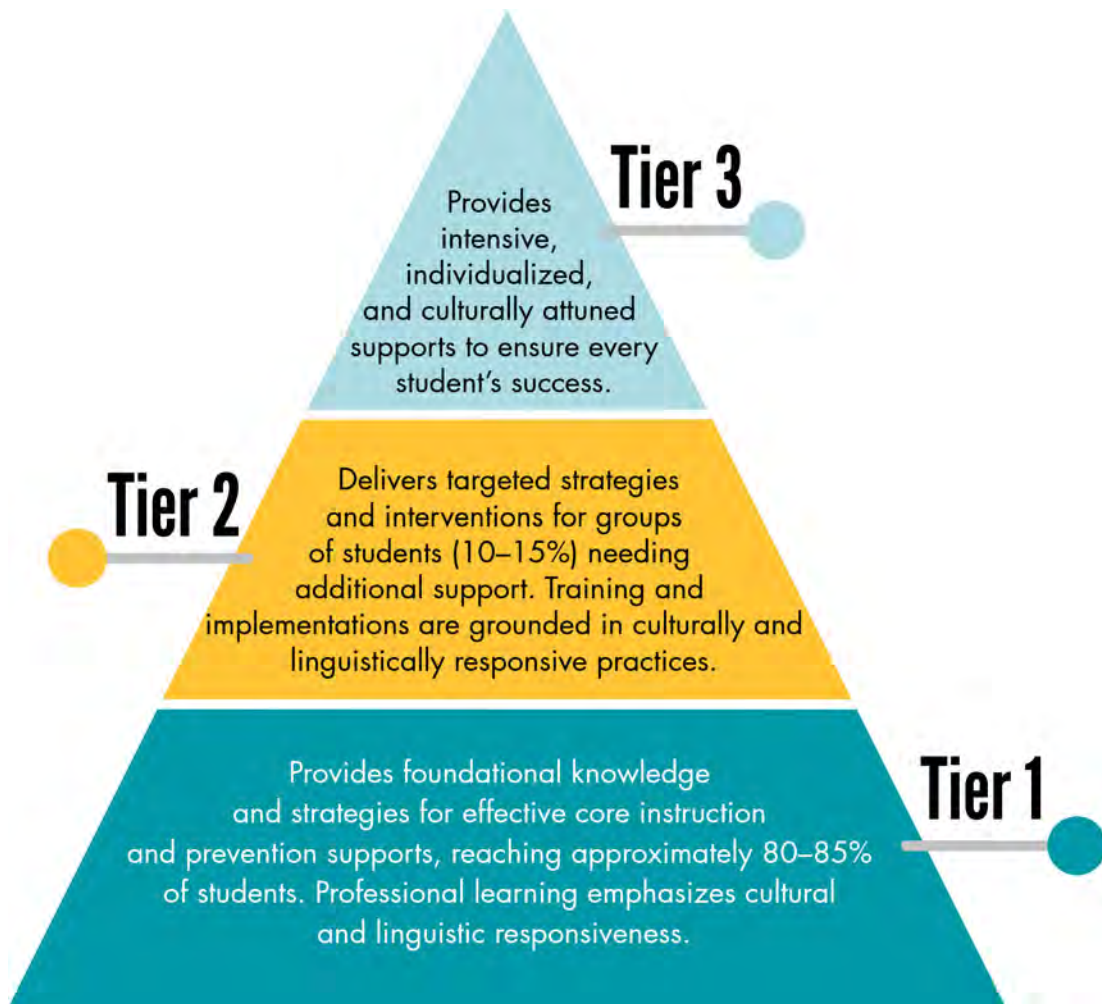
### SSA Leadership

Tanya Frisendahl  
Morgan Cottle

# SSA Comprehensive Plan Overview

## Overview

This plan uses a tiered model to help districts reduce academic disparities and strengthen behavioral and mental health supports. Services can be integrated with district efforts to enhance student achievement, well-being, and equity.



## Requirements

According to HB 3427 (2019), an ESD Comprehensive Support Plan must:

- (A) Align with and support school districts in meeting the performance growth targets of the school districts developing the plan;
- (B) Include the provision of technical assistance to school districts in developing, implementing and reviewing a plan for receiving a grant from the Student Investment Account;
- (C) Provide for coordination with the department in administering and providing technical assistance to school districts, including coordinating any coaching programs; and
- (D) Be adopted and amended as provided for local service plans under ORS 334.175

# SSA - Tier I: Universal Supports



## Direct Services - Available at Cost



### Supporting Instructional Practices

**Mental and Behavioral Supports:** Provides educators with trauma-informed mentoring that supports leadership and instructional practices that promote equity, behavior supports, and social-emotional learning for all students.

**Reducing Academic Disparities:** Supports educators with content-specific mentoring that supports leadership and instructional practices that promote equity, differentiation, evidence-based practices, reduction of academic disparities for historically underserved students, and academic achievement for all students.

- **Beginning Teacher Mentors** - Provides teacher mentors to support beginning teachers with mentoring that supports effective instructional practices, classroom management, and social-emotional learning.
- **Beginning Administrator Mentors** - Provides leadership support and mentorship for administrators across general education, special education, and central office roles.
- **Mental and/or Behavioral Health Professional (FTE):** Licensed mental and behavioral health professionals provide culturally responsive support to students across all three tiers, addressing behavioral and mental health challenges. Tier 1 services include classroom lessons on resilience, self-regulation, and mindfulness, as well as implementation of school-wide social-emotional programs like Second Step and Kelso's Choices. These supports help students build skills for emotional well-being and positive social interactions.

## Technical Support Services -

Provided at No Additional Cost



### Integrated Programs Plan

- Community Engagement Facilitator
- Data Analysis
- One-on-One Technical Assistance
- Integrated Programs Plan & Progress Report Development
- Longitudinal Performance Growth Targets/Progress Monitoring
- Translation Services
  - Linguava – Supplies translation services for documents focused on SIA work. Districts will be able to access services from Linguava using funding available in district/eligible charter school Linguava accounts.



# SSA - Tier I: Universal Supports (Cont.)

## Technical Support Services - *Provided at No Additional Cost*



### Professional Learning for Equity and Well-Being

- **Family Engagement – Scholastic & Dr. Karen Mapp**
  - Supports districts in reframing family engagement as an instructional strategy to improve student outcomes. Training includes in-person and virtual sessions on effective family-school partnerships and topics such as:
    - Effective Practices to Welcome All Families
    - Process Conditions and the 4 C's
    - Engaging Hard-to-Reach Families
    - Differentiated Support and Two-Way Communication - *District teams receive on-site and virtual coaching, with continued support through monthly Communities of Practice (CoPs) and district-specific follow-up.*
- **Playworks – K–8 Organized Play** - Fosters safe, healthy, and inclusive play for K–8 students.
- **Equity Professional Learning (PK–12)** - Foundational training in recognizing and addressing implicit bias, systemic racism, and microaggressions.
- **Skillful Teaching (Research for Better Teaching)** - Builds educators' capacity for effective decision-making, continuous learning, and data-informed instruction to improve student achievement.
- **Skillful Leadership & Coaching – Analyzing Teaching for Student Results (ATSR)** - Seven-day leadership program for improving teaching and learning through observation, analysis, and coaching aligned with state frameworks.
- **Social Emotional Learning (SEL)** - Training and coaching to help districts implement research-based, culturally responsive SEL programs aligned with Oregon TSEL standards.
- **Trauma-Informed Care & Adverse Childhood Experiences (ACEs)** - Professional learning on trauma-responsive practices that promote safety, empowerment, and resilience by creating stable, nurturing environments that prevent and mitigate childhood trauma.
- **Universal Design for Learning (UDL)** - Framework to improve and optimize teaching and learning for all learners based on scientific insights into how people learn.
- **Early Literacy Strategies (K–3) and 4–12 Literacy** - Professional learning in evidence-based reading instruction grounded in the Science of Reading, supporting teachers and paraprofessionals.
- **MTSS, Standards-Based Instruction, & Data-Informed Practice** - Coaching and professional learning to develop and sustain Multi-Tiered Systems of Support (MTSS), implement standards-based instruction, and analyze OSAS trend data to improve teaching and student outcomes.



# SSA - Tier II: Group Supports



## Direct Services -

Available at Cost in partnership with the Student Services Division

### Mental and Behavioral Health Professional (FTE)

Licensed mental or behavioral health professionals support students' behavioral and mental health needs across all three tiers.

- Tier-2: Provides small group counseling, teaches social and emotional skills such as relaxation, problem-solving, and self-regulation, and implements evidence-based programs like:
  - Check-In Check-Out
  - Check and Connect
  - Other reinforcement and self-monitoring systems.



## Technical Support Services -

Provided at No Additional Cost



### On Demand Training

SOESD offers in-person or virtual training for new or transitioning certified and classified staff on topics such as safe behavior intervention, teamwork in specialized classrooms, implementing Behavior Support Plans and IEPs, and supporting emerging bilingual students.

- **321 Insight** - 321 Insight offers concise, practical online trainings through its Trauma-Informed and ParaSharp series that staff can easily access and apply.
- **SOESD's webPD** – SOESD offers six online, asynchronous courses based on district and charter school input.

# SSA - Tier III: Individual Supports

**Direct Services** - Available at Cost in partnership with Student Services



Reducing Academic Disparities and Behavioral and Mental Health

- Licensed Mental and/or Behavioral Health Professional (FTE)
- Tier-3: Provides individual counseling for depression, anxiety, anger management, and trauma, develops crisis de-escalation plans, and conducts suicide screening for moderate- to high-risk students while coordinating with families and community supports.



# SSA - Supports for Integrated Programs Plan

## Supports for Integrated Programs Plan

SOESD provides technical assistance to districts and eligible charter schools in implementing Integrated Programs and meeting state and federal requirements across key areas:

- **Every Day Matters (EDM):** Professional learning and coaching to reduce chronic absenteeism through attendance team support, data tools (CAPT), regional collaboratives, and community partnerships.
- **Small/Rural District Support:** Targeted technical assistance to reduce administrative burden for ODE-identified small and rural districts.
- **High School Success (HSS):** Collaboration with the Career Connected Learning (CCL) Team, Southern Oregon CTE Consortium (SOCTEC), and higher education partners to expand CTE and college-level programs that meet HSS goals.
- **Career and Technical Education (CTE):** Coordination of programs aligned with career pathways and college credit, including Perkins grant management, Program of Study approval, instructor certification, professional development, and technical assistance. SSA-funded project managers provide support connecting CTE and HSS within Integrated Plans.
- **Early Indicator and Intervention Systems (EIS):** Consortium-based support for districts to implement and maintain EIS tools and strategies.
- **Federal School Improvement Support (FSI):** Specialists will be available to work with individual schools, districts, and regionally to offer technical assistance and/or professional learning that supports their identified TSI and/or CSI schools.
- **Student Investment Account (SIA):** SOESD will work with individual districts and regionally to support professional learning and technical assistance to support districts' outcomes, strategies, and attainment of their Longitudinal Performance Growth Targets (LPGTs). Supports listed in the Comprehensive Support Plan are designed to improve student academic outcomes and increase mental and behavioral health and wellness.
- **Early Literacy Success School District Grant (ELSSDG):** Focused on increasing early literacy for children from birth to third grade by reducing literacy academic disparities for student groups that have historically experienced academic disparities. Interested districts can access professional learning and coaching to increase support to parents and guardians to enable them to be partners in the development of their children's literacy skills and knowledge. Supports are research-aligned, culturally responsive, student-centered and family-centered.



*“I learned a lot from  
[the facilitators] as well as  
the rest  
of the group.*

*I also felt welcomed  
and included in everything.*

*I look forward to future  
classes and I can't wait to  
take the information*

*I learned  
to my coworkers.”*

*- Instructional  
Assistant*

# Appendix



The appendix lists contact information for each department's administrators, making it easy to connect with the right people when you need support.

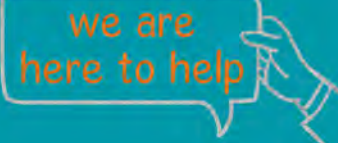
# Contact Us!



Program	Leadership Contact Info	
<b>Superintendent's Office</b>	Dr. Mark Angle-Hobson - Superintendent mark_angle-hobson@soesd.k12.or.us 541-776-8590 x1117	Kylee Harrison - Asst. Superintendent kylee_harrison@soesd.k12.or.us 541-776-8590 x3124
<b>Human Resources</b>	Ryan Swearingen - Chief Human Resources Officer ryan_swearingen@soesd.k12.or.us 541-776-8590 x1104	Stephanie Cossey - HR Manager stephanie_cossey@soesd.k12.or.us 541-776-8590 x1183
<b>Business Services</b>	Jeanetta Woodside - Chief Financial Officer jeanetta_woodside@soesd.k12.or.us 541-776-8590 x1102	Colton Cochran - District Controller colton_cochran@soesd.k12.or.us 541-776-8590 x1108
<b>Technology Services</b>	Tom Bigboy - Chief Information Officer tom_bigboy@soesd.k12.or.us 541-776-8590 x1109	Israel Mathewson - Technology Manager israel_mathewson@soesd.k12.or.us 541-776-8590 x1180
<b>Autism/STEPS</b> Autism, STEPS Plus, STEPS Care	Nikki Donnelly - Coordinator nicole_donnelly@soesd.k2.or.us 541-776-8590 x3106	
<b>Communications &amp; Partnerships</b> Klamath Promise, Southern Oregon Success, Southern Oregon Early Learning Services (SOELS), Childcare Resource Network (CCRN), Family Support and Connections (FS&C)	Erin Green - Coordinator erin_green@soesd.k12.or.us 541-776-8590 x3162	<p><b>Program Managers:</b></p> <p>Eva Skuratowicz - SORS eva_skuratowicz@soesd.k12.or.us 541-776-8590 x1151</p> <p>Cynthia Anderson - CCRN cynthia_anderson@soesd.k12.or.us 541-776-8590 x1110</p> <p>Jessie McClung - Klamath Promise jessie_mcclung@soesd.k12.or.us 541-776-8590 x2107</p> <p>Rene' Brandon - SOELS rene_brandon@soesd.k12.or.us 541-776-8590 x1154</p>
<b>Day Treatment, Residential, Nursing, &amp; Speech</b> Long Term Care and Treatment, Speech Language Services, School Nursing Services	Diane Dunas - Coordinator diane_dunas@soesd.k12.or.us 541-776-8590 x3101	

# Contact Us!

we are  
here to help




Program	Leadership & Contact Info	
<b>Deaf/Hard of Hearing &amp; Vision Services</b> Audiology, Deaf and Hard of Hearing, Visual Impairment	Jaime Banks - Coordinator jaime_banks@soesd.k12.or.us 541-776-8590 x3122	Eric Crook - Program Manager eric_crook@soesd.k12.or.us 541-776-8590 x3149
<b>Early Intervention/ECSE</b> EI/ECSE, Josephine County LRAC, Early Childhood Services, Inclusion Project	Shannon Bilbao - Coordinator shannon_bilbao@soesd.k12.or.us 541-776-8590 x4747	Louise Horn - Program Manager louise_horn@soesd.k12.or.us 541-776-8590 x4721
<b>Focal Student Groups</b> Equity Collaborative, English Learners, Indian Education, Migrant Education, LGBTQ2SIA+, TAG	Andrea Townsend - Coordinator andrea_townsend@soesd.k12.or.us 541-776-8590 x3130	Lise Prusko - Program Manager elizabeth_prusko@soesd.k12.or.us 541-776-8590 x3132
<b>Integrated Instruction</b> Curriculum, Instruction, & Assessment, Instructional Technology, Library/Media, Apprenticeships, Regional Educator Network, Mentoring	Aaron Cooke - Coordinator aaron_cooke@soesd.k12.or.us 541-776-8590 x1107	
<b>Orthopedic Impairment &amp; Youth Employment</b> Orthopedic Impairment, Youth Employment Services, Regional Technical Assistance Program	Andree Johnson - Coordinator andree_johnson@soesd.k12.or.us 541-776-8590 x3126	
<b>Psychology, Autism, &amp; Traumatic Brain Injury Services</b> Psychological Services, Traumatic Brain Injury Services, Autism	TBD - Coordinator @soesd.k12.or.us 541-776-8590 x3161	
<b>Student Engagement</b> Career Connected Learning (CCL), College & Career (CC4A)/STE(A)M, Attendance, Student Success Act	Brad Capener - Coordinator brad_capener@soesd.k12.or.us 541-776-8590 x3181	Brian Robin - CTE Program Manager brian_robin@soesd.k12.or.us 541-776-8590 x 1113  Karla Clark - CCL Program Manager karla_clark@soesd.k12.or.us 541-776-8590 x1128
<b>Student Behavioral Health &amp; Wellness</b> SBHW, Recovery Supports, School Safety and Prevention Systems	Sandy Stack - Coordinator sandra_stack@soesd.k12.or.us 541-776-8590 x3206	

*"I have two sons  
that have been in  
[the Mental Health  
Interventionist's] care for  
the last couple of months.*

*I've noticed a huge  
difference in their behavior  
and that they enjoy the days  
they get to visit her. They  
both have been working  
towards being  
their best self!"*

*- Parent of Students  
receiving SOESD Student Services*



*“Everything we do is rooted in being human-centered and people-first. Exceptional service means listening well, responding thoughtfully, and partnering with our districts in ways that lift up children and families across Southern Oregon.”*

*-Dr. Mark Angle-Hobson  
SOESD Superintendent*



**SOESD**

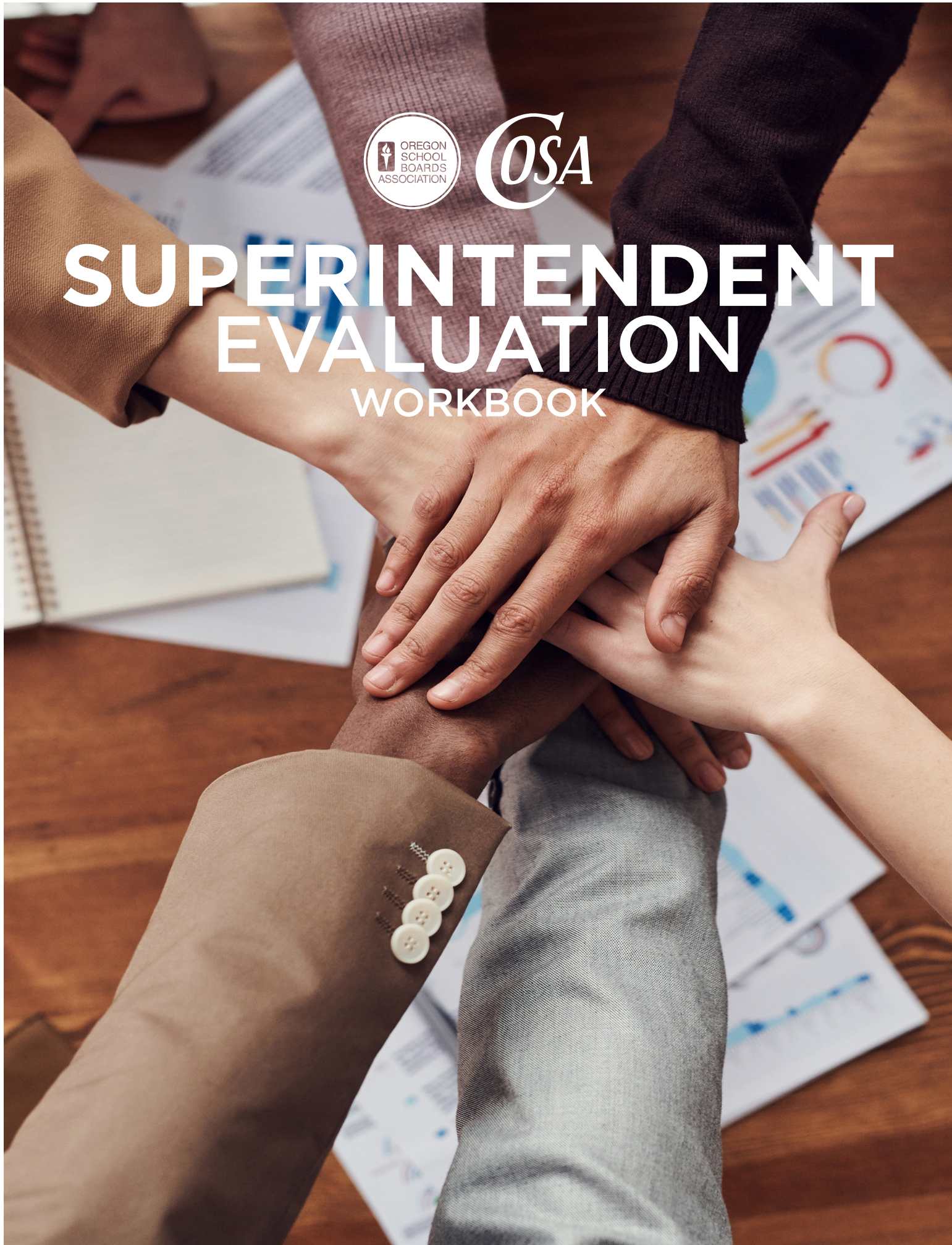




Revised December 5, 2025



# SUPERINTENDENT EVALUATION WORKBOOK



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**OREGON SCHOOL  
BOARDS ASSOCIATION**

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SCHOOL ADMINISTRATORS**

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*rev 6/2020*

June 1, 2020

Dear Oregon School Boards and Superintendents,

The research is clear — a healthy and productive relationship between a school board and its superintendent is essential to the sustained success of any school district or ESD. Simply put, when superintendents and school boards work effectively together, especially over the long term, their schools and students do better.

The role of the superintendent is critical — and together with support provided by the school board through constructive direction, guidance and evaluation of the superintendent, sets the foundation and ensures success. The evaluation of the superintendent is the responsibility of the school board. This OSBA and COSA endorsed process is intended to guide the evaluation process between the school board and their superintendent with a collaborative approach that is designed to continuously improve not only the performance of the superintendent, but also the system they lead. The evaluation of the superintendent, if done well, should provide useful feedback to the superintendent, as well as clear accountability for the superintendent and the school board.

In the 2019-20 school year, OSBA and COSA partnered to produce this co-endorsed superintendent evaluation process. The purpose of this endeavor was to bring clarity and consistency to school boards' performance expectations of superintendents and to provide guidance to boards and superintendents for an effective evaluation process based on evidence-based practices and continuous improvement. The process for developing this handbook included many opportunities for superintendents and school board members to provide input.

The responsibility for evaluating the superintendent resides with the school board; however, this process should be done in a collaborative manner. School boards may choose to work with a consultant to assist them in this process. This process should be an iterative cycle that helps guide and focus the key work in Oregon districts and supports the continuous improvement of Oregon superintendents.

Sincerely,



Jim Green, OSBA Executive Director



Craig Hawkins, COSA Executive Director

# SUPERINTENDENT EVALUATION OVERVIEW

Selecting the superintendent and evaluating their performance is one of the school board's most important responsibilities.

This workbook is designed to help boards and superintendents navigate the evaluation process together and it is intended to be collaborative and keep the board's role at the forefront.

## A HIGH-QUALITY SUPERINTENDENT EVALUATION:

- develops good board/superintendent relationships
- clarifies roles
- identifies superintendent professional development opportunities
- provides a mechanism for public accountability
- provides input and feedback to the superintendent to guide continuous improvement

## PERFORMANCE EVALUATIONS ARE MOST EFFECTIVE WHEN THEY ARE DESIGNED AND USED FOR:

- strengthening the board/superintendent relationship
  - reviewing past performance
  - communicating future expectations and goals
  - determining future professional development for the superintendent
  - making ongoing employment decisions (contract extension and compensation)
- 

## FIVE-PART EVALUATION TOOL

OSBA and COSA have developed a five-part tool for evaluating superintendents.

- **PART 1 SUPERINTENDENT PERFORMANCE STANDARDS. (Appendix A)**  
These are based on the Professional Standards for Educational Leaders (PSEL, 2015) and District Level National Educational Leadership Preparation Standards (NELP, 2018) and augmented by standards jointly developed by the Coalition of Oregon School Administrators (COSA) and the Oregon School Boards Association (OSBA).
- **PART 2 SUPERINTENDENT GOALS. (Appendix B)**  
This section evaluates progress toward the superintendent's goals established by the board and superintendent at the beginning of the evaluation cycle.
- **PART 3 EVIDENCE OF PERFORMANCE. (Appendix C)**  
This consists of the superintendent's self-evaluation and their regular reporting to the board on progress toward standards and goals. This area may be supported by artifacts or documents specifically in those areas where the board may lack direct knowledge.

- **PART 4 FEEDBACK ON PERFORMANCE. (OPTIONAL, Appendix D)**  
This consists of a targeted feedback survey (TFS)<sup>1</sup> of the superintendent's performance by selected staff and members of the community that have frequent, consistent interactions with the superintendent.
- **PART 5 EVALUATION SUMMARY. (Appendix E)**  
This is the summary of the evaluation the board writes to share its unified message with the superintendent and the public.

School board members typically complete ratings in Parts 1 and 2 individually and should consider information gathered in Parts 3 and 4 (if used) in these ratings. The individual board member ratings are then compiled and summarized into one comprehensive evaluation. Part 5 is a written report given by the board for discussion with the superintendent and placed in the superintendent's personnel file. A summary of the evaluation is shared with the public at the conclusion of the formal evaluation cycle. It is important that the board speak with one voice that represents the consensus of the board.

## HOW CAN WE EVALUATE OBJECTIVELY AND FAIRLY?

Objective and fair evaluations take into consideration policy, the superintendent's employment contract, standards, goals, articles of evidence and targeted feedback surveys. At the beginning of each evaluation cycle, the board should review the superintendent's contract and its own policy regarding superintendent evaluation. With that information, the board then determines the criteria, process and timeline so there are no surprises when the formal evaluation occurs. To be fair and objective, boards should only introduce additional criteria during the year in extenuating circumstances and should follow policy CBG for guidance on doing so. **It is the board's responsibility to ensure that policy and contractual timelines are met.**

## DOCUMENTATION

The processes outlined in this workbook are more than a checklist. They require the objective consideration of evidence demonstrating the degree to which each standard has been met. This evidence can be through direct interaction and observation of the superintendent's performance or may be obtained through the superintendent's self-evaluation and/or information gained through a targeted feedback survey. Documentation may be provided by the superintendent orally, as written lists, or as specific documents. Some boards and superintendents may select an artifacts of evidence approach<sup>1</sup>.


## EVALUATION CONFERENCES AND CHECK-INS

Face-to-face conversations between the board and superintendent during the evaluation cycle are essential to an effective process. Regular reports to the board by the superintendent and check-in meetings should occur at least quarterly throughout the year. This provides the superintendent and board an opportunity to be updated on the superintendent's progress toward meeting the goals and performance standards, and to provide feedback on any concerns the board might have. This also allows the superintendent an opportunity to seek further guidance and support from the board, or provide further clarification about the progress needed to meet the targets, and make mid-year corrections on the path to achieving goals and standards. The final evaluation conference is where the board and superintendent meet to discuss the superintendent's performance and an evaluation report is presented.

<sup>1</sup>Described later in this workbook

# SUPERINTENDENT EVALUATION AT A GLANCE

Time to start thinking about next year!



## **MARCH THROUGH AUGUST | PRE-EVALUATION**

In collaboration with the superintendent, adopt all standards, goals and evaluation procedures. This includes adopting materials for Parts 1 and 2, and adopting a schedule for Parts 3 and 4 (if used).

## **AUGUST THROUGH MARCH\* | CHECK-IN MEETINGS**

Check-in meetings occur at least quarterly. These check-ins give the superintendent the opportunity to provide information related to goals and standards, and for the board to ask questions about progress and provide additional guidance and support. This also includes a final check-in in which the superintendent can present their self-evaluation. These meetings are generally conducted in executive session. This correlates to Part 3.

## **JANUARY THROUGH MARCH\* | GATHER INFORMATION**

The superintendent's self-evaluation is presented to the board. Board members rate the superintendent on Parts 1 and 2 individually, and then compile ratings and comments into a summary document. If a targeted feedback survey is used, the survey would be conducted in this phase.

## **MARCH\* | EVALUATION RESULTS**

By March 15<sup>th</sup>, or at a date specified in the superintendent's contract, the board meets with the superintendent to review the evaluation results. This meeting is conducted in executive session unless the superintendent requests the meeting be conducted in public. Generally, the board crafts a short narrative statement about the evaluation to be shared at a regular board meeting. This correlates to Part 4.

## **MARCH\* | EVALUATION CONCLUSION**

The board adopts the short narrative summary in open session. This corresponds to Part 5.

\*Review the superintendent's contract and district policy for any applicable deadlines.

## PERFORMANCE RATINGS

**PART 1** (In Appendix A) includes eight standards with descriptors. Board members should not rate descriptors but, rather, consider them as a whole in determining the overall rating for that performance standard.

The scoring guide for each standard uses the following four categories:

**4 = ACCOMPLISHED | 3 = EFFECTIVE | 2 = DEVELOPING | 1 = INEFFECTIVE**

Read each standard's descriptions carefully while considering your rating and select the score that most closely matches your judgment and the evidence provided of the superintendent's work in this area.

**PART 2** (In Appendix B) includes any goals that were set for the superintendent during the evaluation cycle. The superintendent's goals should be rated with the same scale. It is highly recommended that the superintendent provides a self-evaluation on their performance in the standards, goals and any other criteria determined for the evaluation cycle. This self-evaluation and any accompanying evidence provided in Part 3 shall be provided to the board prior to conducting their evaluation of the superintendent's performance.

## WRITTEN COMMENTS

Written comments from individual members of the board help clarify ratings on standards and goals; however, they are not intended as direct feedback to the superintendent. They may contribute to the board's one-voice message to the superintendent that can help clarify the evaluation feedback.

The written comments may be prepared by a board member or consultant working on behalf of the board. This provides the board with the opportunity to deliver specific constructive criticism and/or accolades and provides the superintendent with useful information for continuous performance improvement. Again, the board should speak with one voice in making written comments on the final evaluation report and summary to the superintendent and the community.

## PUBLIC MEETINGS LAW

A governing body such as a school board, ESD board or community college board may hold an executive session to evaluate the job performance of its chief executive officer, so long as the person being reviewed does not request an open session (ORS 192.660(2)(i)). However, the executive session for evaluation does not allow the board to discuss the superintendent's salary, conduct a general evaluation of a district goal or give directives to personnel about district goals (ORS 192.660(8)). The governing body must give advance notice of the performance evaluation to allow the person whose performance will be evaluated to choose whether to conduct the evaluation in open session or executive session.

The Attorney General's Public Records and Meetings Manual states that disclosure of the performance evaluation for the chief executive officer generally is not an unreasonable invasion of privacy, and therefore disclosable to the public even though the actual evaluation was held in executive session. This disclosure is in contrast to the disclosure of a record of discipline about a public officer, which is conditionally exempt from disclosure. OSBA and COSA recommend that a narrative summary of the performance evaluation be presented to the public after the evaluation is complete.

# TIMELINE AND ACTION

## 1. **PRE-EVALUATION** (March, April or as soon as a new superintendent begins employment)

Before the new evaluation cycle begins, and prior to the completion of the district's budget, the board should review any statutes, recent legislation, policies and the superintendent's contract for any specific criteria regarding evaluation that must be followed by the board. Following that review, the board and superintendent should mutually establish the evaluation timeline, process, and criteria (goals and expectations, and standards). The board and superintendent should meet to develop a clear set of goals for the superintendent that are related to the goals for the organization for the coming year. OSBA and COSA jointly recommend the performance standards provided in this document which are based on national standards for district leaders. In some cycles it is prudent for the board to emphasize and prioritize certain standards based on previous evaluations, the tenure of the superintendent or the strategic priorities of the district.

## 2. **CHECK-IN MEETINGS** (July, October and January or quarterly, based upon when a new superintendent begins employment)

The board and the superintendent meet to discuss the superintendent's progress toward meeting the formally-adopted goals, to talk about any specific concerns related to the superintendent's performance, and to offer support to the superintendent. It is recommended that the superintendent, in the January board meeting, provides the self-evaluation (Part 3) for board members to consider when they each complete Parts 1 and 2 of the process.

## 3. **GATHER INFORMATION** (By March 15 or date specified in contract)

Compiling results from individual board members can be confusing if there are conflicting perspectives; therefore, it is best done by discussion among all board members sitting together in executive session. Some boards work with a consultant to assist in the evaluation process including facilitating the TFS and compiling individual board member ratings into one unified rating. Since the superintendent works for the board (as a whole, not its individual members), it is critical that board members recognize the importance of coming to a consensus and speaking with one voice in the evaluation. The evaluation should result in areas for celebration, in steps for professional development for the superintendent, and in a plan for informing the community about the results of the evaluation and status of the district's goals.

## 4. **EVALUATION RESULTS** (March)

OSBA and COSA recommend that a narrative summary of the performance evaluation be presented to the public after the evaluation is complete. Before the beginning of the next evaluation year, the board and superintendent should meet to begin the next cycle of goal setting and evaluation, which allows the superintendent time to plan for the ensuing year. The goals should be formally adopted by the board and made public to keep the district and community informed.

## **5. EVALUATION CONCLUSION**

In the final year of the superintendent's contract the board must provide notice of renewal or non-renewal by March 15 or a date specified in the contract (ORS 342.513). There may also be renewal provisions in the superintendent's contract, so boards should review the contract for any additional requirements. If you have questions regarding the terms and renewal provisions in the superintendent's contract or are considering nonrenewal, we recommend that you consult with legal counsel. The superintendent evaluation process provides the board with an opportunity to share the school district's progress with the community. A short summary of the board's evaluation of the superintendent should be prepared based on the data and evidence gathered in the evaluation process.

### **HOW WILL AN INDIVIDUAL FILLING THE DUAL ROLES OF SUPERINTENDENT AND PRINCIPAL BE EVALUATED?**

"An individual filling the dual roles of principal and superintendent is a superintendent who has some principal duties, and therefore need only be evaluated as a superintendent. Since the superintendent role supersedes the principal role and superintendents are not included under the evaluation requirements for SB 290, it is up to local school boards to determine how these individuals are evaluated." ([ODE Teacher and Administrator Evaluation and Support Systems Frequently Asked Questions](#), Revised August 2018, Question #8.)

## **PERTINENT OREGON REVISED STATUTES (ORS) AND OREGON ADMINISTRATIVE RULES (OAR)**

### **ORS 192.660 Executive sessions permitted on certain matters; procedures; news media representatives' attendance; limits.**

- (1) ORS 192.610 to 192.690 do not prevent the governing body of a public body from holding executive session during a regular, special or emergency meeting, after the presiding officer has identified the authorization under ORS 192.610 to 192.690 for holding the executive session.
- (2) The governing body of a public body may hold an executive session: ...
  - (i) To review and evaluate the employment-related performance of the chief executive officer of any public body, a public officer, employee or staff member who does not request an open hearing...
- (8) A governing body may not use an executive session for purposes of evaluating a chief executive officer or other officer, employee or staff member to conduct a general evaluation of an agency goal, objective or operation or any directive to personnel concerning agency goals, objectives, operations or programs.

### **OAR 199-040-0020 Permitted Topics for Executive Session**

- (3) Compensation, including salaries and benefits, must not be discussed or negotiated during an executive session under ORS 192.660(2)(a), (b) or (i).

### **ORS 342.513 Renewal or nonrenewal of contracts for the following year.**

- (1) Each district school board shall give written notice of the renewal or nonrenewal of the contract for the following school year by March 15 of each year to all teachers and administrators in its employ who are not contract teachers as defined in ORS 342.815 (Definitions for ORS 342.805 to 342.937). In case the district school board does not renew the contract, the material reason therefore shall, at the request of the teacher or administrator, be included in the records of the school district, and the board shall furnish a statement of the reason for nonrenewal to the teacher or administrator.
- (2) This section is not effective unless teachers or administrators notify the board in writing on or before April 15 of acceptance or rejection of the position for the following school year.

**ORS 342.120(1)** "Administrator" includes but is not limited to all superintendents, assistant superintendents, principals and academic program directors in public schools or education service districts who have direct responsibility for supervision or evaluation of licensed teachers and who are compensated for their services from public funds.

## OREGON SCHOOL BOARDS ASSOCIATION SELECTED SAMPLE POLICY CBG

Adopted:

### EVALUATION OF THE SUPERINTENDENT

The board will formally evaluate the superintendent's job performance at least once each year. The evaluation will be based on the administrative job description, any applicable standards of performance, board policy and progress in attaining any goals for the year established by the superintendent and/or the board.

Additional criteria for the evaluation, if any, will be developed at a public board meeting prior to conducting the evaluation. The superintendent will be notified of the additional criteria prior to the evaluation.

The board's discussion and conferences with and about the superintendent and their performance will be conducted in an executive session, unless the superintendent requests a session open to the public. Such an executive session will not include a general evaluation of any district goal, objective or operation. Results of the evaluation will be written and placed in the superintendent's personnel file.

At the board's discretion, it may notify the superintendent in writing of specific areas to be remedied, and the superintendent may be given an opportunity to correct the problem(s). Where the board provided written notice pursuant to the prior sentence, if the board determines the superintendent's performance remains unsatisfactory, the board may dismiss or non-renew the superintendent pursuant to board policy, the superintendent's employment contract and state law and rules. In those situations where the superintendent's employment contract includes an evaluation, dismissal or non-renewal provision, it shall take precedence over this policy.

END OF POLICY

### LEGAL REFERENCE(S):

ORS 192.660(2), (8)

ORS 332.107

ORS 332.505

ORS 342.513

ORS 342.815

OAR 581-022-2405

Hanson v. Culver Sch. Dist. (FDAB 1975).

**(There are no OSBA-recommended Administrative Regulations (ARs) associated with this policy. If your district has an AR for this policy, we recommend you delete it.)**

## POST-EVALUATION TASKS

As soon as one evaluation cycle is complete, a new one begins. It is important that the momentum from the previous cycle be maintained and that a new cycle with standards, goals and expectations begins immediately.

Based on the outcomes of the previous year's goals, as well as current and future district initiatives, the superintendent should draft goals for the next evaluation period, which the board should consider, discuss, potentially amend, and then formally adopt. This must be done in open session. These goals should be measurable and should reflect the superintendent's role in the overall vision and/or goals of the district.

The board should ensure that the standards, process, components and timeline that the board adopts are consistent with evaluation language in the superintendent's contract. This should be done prior to adopting the process and tool for the new cycle.

The board should also adopt the standards to measure the superintendent's performance, the timeline of the new evaluation cycle and determine whether a targeted feedback survey will be conducted as part of the evaluation cycle.

A critical element of the evaluation cycle is scheduling designated evaluative check-ins between the board and superintendent, which may take place in executive session if they meet legal criteria. This allows the conversation to occur candidly. These are more than just updates at board meetings; these check-ins are meant to focus specifically on the superintendent's performance throughout the year, reflecting progress on goals, performance against standards and any specific concerns the board may have.

An overall performance evaluation should never be a surprise to a superintendent or the board; evaluative check-ins throughout the year allow the superintendent to understand the board's perspective on the superintendent's performance, make any course corrections necessary, and ask for support where needed. We recommend that these check-ins occur quarterly and be embedded in the evaluation timeline adopted by the board.

# TIMELINE

MAR.	APR.	MAY	JUNE	JULY	AUG.	SEPT.	OCT.	NOV.	DEC.
	JAN.	FEB.	MAR.		APR.				

## PRE-EVALUATION

Adopt all standards, goals and evaluation procedures. This includes adopting materials for Parts 1 and 2, and adopting a schedule for Parts 3 and 4.

## CHECK-IN MEETINGS

We recommend that these occur at least quarterly. These check-ins give the superintendent the opportunity to provide information related to goals and standards, and for the board to ask questions about progress. This also includes a final check-in in which the superintendent can present their self-evaluation. These are generally done in executive session. This correlates to Part 3.

## GATHER INFORMATION

Board members rank the superintendent on Parts 1 and 2. If the board chose to have additional stakeholders fill out surveys or provide information, now is the time to conduct those surveys.

## EVALUATION RESULTS

# APPENDICES

## APPENDIX A

### PART 1

## EVALUATION COMPONENT PERFORMANCE STANDARDS

### INSTRUCTIONS

1. Following are descriptors of each of the eight performance standards. Each board member should rate all eight of the performance standards. Performance indicators are listed below each performance standard. These performance indicators suggest objective measures to consider. Do not rate each performance indicator separately; only rate the overall performance standard.
2. Your comments in support of your rating will be helpful during the board discussion for preparation of a summary evaluation form.
3. The board will meet in executive session to discuss the results and prepare a final summary evaluation form representing the consensus of the board.
4. The superintendent will be presented with the final summary report from the full board, not the individual evaluation forms. It is important that the board speak with one voice in evaluating the superintendent.

### SUPERINTENDENT EVALUATION STANDARDS AND DESCRIPTORS

#### KEY:

**4 = ACCOMPLISHED PERFORMANCE**

Performance in this area is routinely outstanding and acts as a model for others.

**3 = EFFECTIVE PERFORMANCE**

Performance in this area consistently meets the standard.

**2 = DEVELOPING**

Performance occasionally meets the standard but is not yet consistent.

**1 = INEFFECTIVE**

Performance currently does not meet the standard.

Rate each of the following superintendent standards based on national standards (NELP). If you have no basis for a rating, please mark "NA" for not applicable. Support your ratings with comments for each section.

## STANDARD 1

# VISIONARY DISTRICT LEADERSHIP

### DESCRIPTORS

- Leads a collaborative process with the board to design (or reaffirm) the district mission and vision that reflects a core set of values and priorities.
- Leads the diverse stakeholder involvement in the development (or revision) of the district's continuous improvement plan based upon the district's mission and vision.
- Implements the district's continuous improvement plan and communicates its progress.

RATING



COMMENTS

## STANDARD 2

# ETHICS AND PROFESSIONAL NORMS

### DESCRIPTORS

- Ensures ethical decisions and cultivates professional norms and culture including equity, fairness, integrity, transparency, trust, collaboration and perseverance.
- Makes ethical and legal recommendations to the board.
- Models ethical behavior in their own conduct and cultivates ethical behavior in others.

RATING



COMMENTS

## STANDARD 3

# INCLUSIVE DISTRICT CULTURE

### DESCRIPTORS

- Develops and maintains a supportive, equitable, culturally responsive and inclusive district culture.
- Evaluates, cultivates and advocates for equitable access to safe and nurturing schools, and the opportunities and resources necessary to support the success and well-being of each student.
- Ensures equitable, inclusive and culturally responsive instructional and behavioral support practices among teachers, administrators and staff.

RATING



COMMENTS

## STANDARD 4

# CULTURALLY RESPONSIVE INSTRUCTIONAL LEADERSHIP AND IMPROVEMENT

### DESCRIPTORS

- Evaluates, designs, fosters and implements coherent systems of curriculum instruction, supports, assessment and instructional leadership.
- Implements coordinated systems of support, including coaching and professional development for staff.
- Manages an appropriate system of assessments, data collection and analysis that supports instructional improvements, equity, student learning and well-being, and instructional leadership.
- Ensures instruction throughout the district utilizes culturally responsive practices and all staff are trained.

RATING



COMMENTS

## STANDARD 5

# COMMUNICATION AND COMMUNITY RELATIONS

### DESCRIPTORS

- Develops and implements effective and collaborative systems that engage multiple and diverse stakeholder groups.
- Engages and effectively communicates with diverse families, community partners and other constituencies to strengthen student learning.
- Cultivates relationships and partnerships with members of the business, civic and local government in support of their advocacy for district, school and community needs.
- Goes beyond the district and local community to advocate for students at the county, regional and/or state level.

RATING



COMMENTS

## STANDARD 6

# EFFECTIVE ORGANIZATIONAL MANAGEMENT

### DESCRIPTORS

- Implements equitable strategies, processes and systems to recruit, hire, develop and retain high-performing personnel who demonstrate a shared commitment to student success.
- Establishes productive relationships with associations while managing labor relations and contracts effectively.
- Creates and maintains organizational structures that maximize the district's capacity to positively impact student learning.
- Creates a comprehensive system of professional development for all staff to continuously improve and increase their leadership capacity.

RATING



COMMENTS

## STANDARD 7

# EFFECTIVE FINANCIAL MANAGEMENT

### DESCRIPTORS

- Develops a proposed budget in accordance with board priorities and district direction.
- Manages the equitable implementation of district resources aligned with the budget adopted by the board.
- Communicates the budget priorities and ensures regular updates on implementation of the budget.

RATING



COMMENTS

## STANDARD 8

# POLICY, GOVERNANCE AND ADVOCACY

### DESCRIPTORS

- Develops relationships, leads collaborative decision-making and governance, and represents and advocates for district needs in local, county and state policy conversations.
- Cultivates a respectful and responsive relationship with the district board of education focused on achieving the shared mission and vision of the district.
- Implements, maintains and communicates district, state and national policy, laws, rules and regulations to staff, board and other appropriate stakeholders.

RATING 

COMMENTS

# APPENDIX B

## PART 2

### EVALUATION COMPONENT GOALS

#### INSTRUCTIONS

In addition to the performance standards, boards and superintendents may wish to develop one to three specific superintendent goals to be used in the evaluation process. These goals should be based on the superintendent's previous evaluation and/or the district's current strategic initiatives or goals. Ideally, these goals should be developed collaboratively. The superintendent's goals should reflect his/her role in achieving the overall goals of the district but are not the same as the overall district goals.

1. Each board member should rate the superintendent's performance in meeting their evaluative goals agreed to by the superintendent and the board at the beginning of the evaluation process.
2. Your comments in support of your rating will be helpful during the board discussion for preparation of a summary evaluation report.
3. The board will meet in executive session to discuss the results and prepare a final summary evaluation report representing the consensus of the board.
4. The superintendent will be presented with the final summary report from the full board, not the individual evaluations. **It is important that the board speaks with one voice in evaluating the superintendent.**

# SAMPLE GOAL STATEMENT 1:

---

## PERFORMANCE INDICATORS:

*(Insert indicators of success here)*

- 1.1
- 1.2
- 1.3
- 1.4
- 1.5

**SUMMARY RATING — GOAL 1:** *(check one)*

4    3    2    1    N/A

## COMMENTS:

# APPENDIX C

## PART 3

### EVALUATION COMPONENT ARTIFACTS OF EVIDENCE/SELF-EVALUATION

The superintendent may be asked to provide additional information to support the board in their evaluation of the performance standards/evaluation goals. In an ideal board-superintendent relationship the board may have very little direct knowledge of the superintendent’s day-to-day operations. Artifacts of evidence are intended to give the board objective information concerning specific performance standards/evaluation goals. The following table is intended to give some possible examples for each standard; this is not intended to be an exhaustive list. These artifacts may be collaboratively identified at the beginning of the evaluation cycle by the board and superintendent. Artifacts of evidence may also be used in the informal check-in process throughout the performance cycle.

#### STANDARD 1: VISIONARY DISTRICT LEADERSHIP

DESCRIPTORS	ARTIFACTS
<ul style="list-style-type: none"> <li>• Leads a collaborative process with the board to design (or reaffirm) the district mission and vision that reflects a core set of values and priorities.</li> <li>• Leads the diverse stakeholder involvement in the development (or revision) of the district’s continuous improvement plan based upon the district’s mission and vision.</li> <li>• Implements the district’s continuous improvement plan and communicates its progress.</li> </ul>	<ul style="list-style-type: none"> <li>• Evidence of how you have constructed and enacted an equity vision and mission across the district and community:               <ul style="list-style-type: none"> <li>· Newspaper, school banners, website, photo, or other media</li> <li>· Actions communicating clear and coherent vision: newsletter, professional development, etc.</li> <li>· Meetings or presentations to collaborate and implement vision, mission, goals and plans</li> </ul> </li> <li>• Models learning through attending professional development opportunities and applying knowledge (transparency)</li> <li>• Presentation of at least one plan (e.g., CIP or SIA application)</li> <li>• Resources are clearly aligned with the vision and strategic initiatives:               <ul style="list-style-type: none"> <li>· Budget examples of how funds support the vision/strategic initiatives</li> <li>· Staffing patterns that reflect where there is an identified need</li> <li>· Data support goals that are aligned to student learning and growth</li> </ul> </li> <li>• Personalized SMART goals focused on student learning and achievement that are specific enough to address short- and long-term plans</li> </ul>

## STANDARD 2: ETHICS AND PROFESSIONAL NORMS

### DESCRIPTORS

- Ensures ethical decisions and cultivates professional norms and culture including equity, fairness, integrity, transparency, trust, collaboration and perseverance.
- Makes ethical and legal recommendations to the board.
- Models ethical behavior in their own conduct and cultivates ethical behavior in others.

### ARTIFACTS

- Agendas and/or minutes from meetings (e.g., community planning, key communicators/advisory meetings, administrative, curriculum team, District Leadership Team, etc.) that demonstrate transparency and equitable practices
- Evidence of ability to confront conflict and build consensus
- Record of solicitation of feedback (collaboration and transparency) and evidence of reflective practice and adaptation
- Reflective journals and evidence of adaptive behavior
- Equity and inclusion plan
- Agendas and/or minutes from meetings that demonstrate collaboration with external partners

## STANDARD 3: INCLUSIVE DISTRICT CULTURE

### DESCRIPTORS

- Develops and maintains a supportive, equitable, culturally responsive and inclusive district culture.
- Evaluates, cultivates and advocates for equitable access to safe and nurturing schools, and the opportunities and resources necessary to support the success and well-being of each student.
- Ensures equitable, inclusive and culturally responsive instructional and behavioral support practices among teachers, administrators and staff.

### ARTIFACTS

- Discipline trends (# of expulsions, days of suspension, disaggregated data by sub-groups and groups of interest, # of restraints/seclusions, etc.)
- Diversity training/awareness plan; evidence of an equity lens and implementation of the plan
- Sections in employee handbooks that demonstrate an inclusive district culture
- External reviews and audits (e.g., budget, nutrition, transportation, safety, OCR, etc.)
- Evidence that all student needs are addressed equitably
- Response to staff or public concerns/issues (documentation)
- State plans and reports (ELL, SPED, CIP, Title, etc.)
- Student learning data from a variety of sources (SBAC, benchmark/ interim assessments, etc.) to monitor progress and achievement (including disaggregated data)
- Uses data from a variety of sources to inform planning, management of resources, impact instruction and close achievement gaps (including disaggregated by sub-groups and groups of interest)
- Evidence of staff use of equitable instructional practices such as culturally responsive pedagogy and strategies

## STANDARD 4: CULTURALLY RESPONSIVE INSTRUCTIONAL LEADERSHIP AND IMPROVEMENT

### DESCRIPTORS

### ARTIFACTS

- Evaluates, designs, fosters and implements coherent systems of curriculum instruction, supports, assessment and instructional leadership.
- Implements coordinated systems of support, including coaching and professional development for staff.
- Manages an appropriate system of assessments and data collection, and analysis that supports instructional improvements, equity, student learning and well-being, and instructional leadership.
- Ensures instruction throughout the district utilizes culturally responsive practices and all staff are trained.

- Agendas and/or minutes (e.g., community planning, key communicators/advisory meetings, administrative team, curriculum team, District Leadership Team, etc.)
- Common teacher instructional planning time (agendas, outcome date, samples, etc.)
- Comprehensive School/District Improvement Plan (CIP)
- Curriculum and/or instructional audit (documentation)
- Documentation of coaching and evaluation of administrative staff in instructional practices, curriculum and assessment
- Instruction related professional development/growth plans (with related data on student achievement)
- Models learning through attendance and application of knowledge from professional development opportunities (documentation)
- Evidence of annual review of district's mission statement and alignment to practice
- Evidence of teachers examining and using student achievement data to improve teaching/learning
- Facilitation of District Leadership Team (learning team with all levels of stakeholders from board to classified)
- Program evaluations that address areas of interest or concern (e.g., outreach, equity, behavioral supports, bullying/harassment, character education, etc.)
- Student learning data from a variety of sources (SBAC, benchmark/ interim assessments, etc.) to monitor progress and achievement
- Uses data from a variety of sources to inform planning, management of resources, impact instruction and close achievement gaps (including disaggregated by sub-groups and groups of interest)

## STANDARD 5: COMMUNICATION AND COMMUNITY RELATIONS

### DESCRIPTORS

- Develops and implements effective and collaborative systems that engage multiple and diverse stakeholder groups.
- Engages and effectively communicates with diverse families, community partners and other constituencies to strengthen student learning.
- Cultivates relationships and partnerships with members of the business, civic and local government in support of their advocacy for district, school and community needs.
- Goes beyond the district and local community to advocate for students at the county, regional and/or state level.

### ARTIFACTS

- Evidence of participation in community/school events
- Accounts of school and district accomplishments and communications in various forms of public media (including website, newsletters, podcasts, public engagement documents, etc.)
- Administrative “calendar” – critical dates calendar (due dates, etc.) and board presentation cycle/annual reports
- Agendas and/or minutes (e.g., community planning, key communicators/advisory meetings, administrative team, curriculum team, collaborative group, stakeholder groups, District Leadership Team, etc.)
- Communication vehicles or methods that make the school vision visible to stakeholders including using technology, number of visits to website, etc.
- Formal or informal community partnership agreements and plans to support collaborative efforts to achieve district goals/priorities
- Memberships and participation with community organizations (e.g., PTA, city council, etc.)
- Participation in state, regional and national initiatives (documentation)
- Presentations to stakeholders (including civic groups, staff, parents, community groups, etc.)
- Response to public and/or stakeholder concerns/issues (documentation)
- Union collaboration (e.g., minutes, negotiations, grievances, etc.)
- Visible support for district goals and priorities from stakeholders and community leaders, such as educational foundation, civic clubs, city council, law enforcement, etc.
- An internal or external communication plan
- Schedules of staff meetings, administrative council meetings, etc.

## STANDARD 6: EFFECTIVE ORGANIZATIONAL MANAGEMENT

### DESCRIPTORS

- Implements equitable strategies, processes and systems to recruit, hire, develop and retain high-performing personnel who demonstrate a shared commitment to student success.
- Establishes productive relationships with associations while managing labor relations and contract effectively.
- Creates and maintains organizational structures that maximize the district's capacity to positively impact student learning.
- Creates a comprehensive system of professional development for all staff to continuously improve and increase their leadership capacity.

### ARTIFACTS

- Staff recruitment and retention plan (including demographics to match student and community population)
- Union collaboration (minutes, negotiations, grievances, etc.)
- Uses data from a variety of sources to inform labor trends, negotiations and bargaining
- Hiring process (guidelines, procedures, schedules, plan for retention and recruitment, mentoring, focus on diversity, etc.)
- Staff attendance and retention rates
- Development plans for improving the capacity of leadership at all levels
- Documentation of coaching for instruction, curriculum, assessment and inclusion
- Meaningful engagement of staff to improve cultural competency and equitable practice (documentation)
- Staff evaluations are complete and include evidence of coaching and evaluation of administrative leaders

## STANDARD 7: EFFECTIVE FINANCIAL MANAGEMENT

### DESCRIPTORS

- Develops a proposed budget in accordance with board priorities and district direction.
- Manages the equitable implementation of district resources aligned with the budget adopted by the board.
- Communicates the budget priorities and ensures regular updates on implementation of the budget.

### ARTIFACTS

- District budget reflects priorities and expectations
- Economic vision that includes participation with community development groups/stakeholders
- Enrollment trend forecasts
- External reviews and audits (e.g., budget, child nutrition, transportation, safety, etc.)
- Financial plan: end-of-year budget status report, three- to five-year plan, long-range plan, etc.
- Grants received/applied for that are aligned with goals of the district, plans for sustainability
- Program evaluations that address areas of interest or concern (e.g., outreach, equity, behavioral supports, bullying/harassment, character education, etc.)
- Construction project(s) management, including timelines, budgets and implementation techniques
- Policies/procedures for management of funds and other resources to make progress or achieve district goals

## STANDARD 8: POLICY, GOVERNANCE AND ADVOCACY

### DESCRIPTORS

- Develops relationships, leads collaborative decision-making and governance, and represents and advocates for district needs in local, county and state policy conversations.
- Cultivates a respectful and responsive relationship with the district board of education focused on achieving the shared mission and vision of the district.
- Implements, maintains and communicates district, state and national policy, laws, rules and regulations to staff, board and other appropriate stakeholders.

### ARTIFACTS

- Administrative team meeting agendas
- Board and administrative goals
- Board meeting agendas
- Timeliness of board packets
- Board policy and administrative regulation enforcement that is reflective of the vision with supporting materials
- Collaborative partners (documentation)
- Comprehensive District Improvement Plan
- External reviews and audits (e.g., budget, policy, child nutrition, transportation, safety, etc.)
- Onboarding plan for board members to understand roles and responsibilities
- Meaningful interpretive reports of student achievement data delivered in accessible language
- Notes from state officials
- Participation in state, regional, national initiatives (documentation)
- State plans and reports (ELL, SPED, CIP, Title, etc.)
- State Report Card data (including disaggregated data by sub-groups and groups of interest)
- Work with city council on city/school initiatives (documentation)
- Participation in state off-the-record meetings, legislative priority meetings, Education Leadership Coalition meetings, etc.

# APPENDIX D

## PART 4

### EVALUATION COMPONENT TARGETED FEEDBACK SURVEY

The targeted feedback survey (TFS) is an optional component meant to give the superintendent and board additional feedback about the performance of the superintendent. The process asks a “targeted” group of stakeholders for feedback via a survey, with questions tied to superintendent performance standards and goals. The board and superintendent should develop an agreed upon list of individuals that will receive the survey. An independent party should conduct the TFS and summarize the results of the survey to report back to the board.

Suggested participants in the TFS may include district administrators, school administrators, union leaders, teacher leaders, confidential staff, families and community leaders. Multiple participants reflect the collective wisdom of groups who work closely with the superintendent. The feedback survey provides a variety of stakeholders an opportunity to share their understanding of how the top education leader for their district is performing. It is highly recommended that participants have regular interaction with the superintendent in order to give helpful feedback via the survey.

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#### STEPS FOR CONDUCTING A TARGETED FEEDBACK SURVEY

- **STEP 1**

It is recommended that the superintendent and board work with an independent consultant to determine the questions for the feedback survey. The consultant should administer the survey and provide the results to the board. Questions should reflect the superintendent’s goals, performance standards and district priorities; these are unique to each district. If you purchase this service, OSBA will work with the board to develop questions appropriate for each group of participants, administer the survey, collect the data and provide the information to the board for consideration in their evaluation of the superintendent.

- **PART 2**

The OSBA consultant will work with your board to develop questions for the TFS. The questions will be aligned to the standards in this workbook and should reflect the expected experience of each group being surveyed. For example, classroom teachers will have a different kind of communication with and access to the superintendent than families will; it is critical that survey questions be appropriately tailored to each group. The board should mitigate barriers to accessibility for the survey, particularly with respect to language and access to technology.

- **STEP 3**

Select the participants to respond to the TFS. The participants should represent an appropriate range of constituent groups that have regular interactions with the superintendent. Responses from participants should be anonymous. The number of participants should be manageable in terms of compiling the results.

- **STEP 4**

The OSBA consultant will distribute the feedback survey electronically with an introductory section explaining the purpose of the survey and assurance that the individual survey results are completely confidential. Approximately two to three weeks should be provided for survey responses to be completed. Frequent reminders may need to be sent to the survey group about completion of the survey.

- **STEP 5**

The OSBA consultant will review the survey results with the board in executive session, highlighting areas of strength identified in the survey and noting any areas for targeted focus and/or improvement.

- **STEP 6**

The board should utilize the survey results as one source of data when evaluating the superintendent. This information should be considered along with the superintendent's self-evaluation, artifacts of evidence and board members direct experience and observation of the superintendent's performance.

# APPENDIX E

## PART 5

### SAMPLE EVALUATION SUMMARY

Below is a sample summary of a board's evaluation of its superintendent.

The board of directors of the (name) school district has completed the annual evaluation of Superintendent (name) for (year). All (number) board members have served on the board for at least one full year and have been able to observe and be a part of the successes achieved this year.

The evaluation focused on 1) eight professional standards and 2) superintendent goals.

Regarding the eight professional standards, we determined that Superintendent (name)'s performance was exemplary in the areas of visionary leadership, communications and community relations, and effective management. In the areas of policy and governance, curriculum planning and development and labor relations, the board felt his/her performance was strong. Instructional leadership, resource management and ethical leadership all received a rating of average.

The board determined that Superintendent (name) has done an outstanding job of attaining the goal set by the board and superintendent in August of last year to update and align the elementary language arts and reading curriculum. His/her success at achieving the goal of improving staff morale and retaining professional staff was rated good. Success in meeting the third goal, raising high school math competency and performance on tests, was also rated good.

[The board and superintendent chose to distribute a targeted feedback survey to members of the staff and community for feedback on his/her performance. The results of this survey were one source of data in the consideration of the performance of the superintendent. We have received the results of that feedback, which reflects that staff morale has improved and that significant curriculum results have been achieved at the elementary level. He/she also shared with us his/her desire to further improve staff morale and focus on bringing the community together in support of the schools.]

We will be working with Superintendent (name) over the next several weeks to develop goals for the superintendent aligned with our district goals and look forward to working together to continue the success of our district.



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# PHOENIX-TALENT SCHOOLS

EXCELLENCE *for* EVERYONE

Board Meeting – 6:00 PM

Wednesday, February 18, 2026

In-Person at Orchard Hill Elementary School

ZOOM Link:

<https://us02web.zoom.us/j/88006800550?pwd=EQFUnG4QaXj8VaFAo1yIF7G27IFAXt.1>

Meeting ID: 880 0680 0550 Passcode: 504831

## AGENDA

- A. Executive Session – 5:30 p.m. — This session is closed to the public under ORS 192.660 (2)(i)
- B. Regular Meeting – Call to Order
- C. Student Representative Report
- D. Accentuate the Positive
- E. Citizen Comments
- F. Superintendent Report
- G. Program Report: TAP Facilities Grant
- H. Consent Agenda
  - 1. Approval of Agenda
  - 2. Approval of Minutes from 2/04/26
  - 3. Personnel Report
- I. Information and Discussion
  - 1. Legislative / OSBA Update
  - 2. Financial Report
  - 3. Renewal of Teacher and Administrator Contracts
  - 4. Drop-out & Graduation Rate
- J. Recess
- K. Action Items
  - 1. SOESD 2026-2027 Local Service Plan & SSA Comprehensive Support Plan
- L. Review of the Next Meeting Agenda
- M. Adjournment