



Zone	School Board Members Present	Budget Committee Members Present
1	Susan Greenberg	Jason Hohnbaum, Budget Committee Vice Chair
2	Karen Pérez	Farah Mahamoud (Absent)
3	Eric Simpson	Diane McCartney
4	Sunita Garg	Alok Mehrotra (Virtual)
5	Ugonna Enyinnaya	Christa Billings (Virtual)
6	Becky Tymchuk, School Board Vice Chair	Heidi Edwards, Budget Committee Chair
7	Tom Colett, School Board Chair	Dr. Lisa Shultz
District Staff Present:		
Dr. Gustavo Balderas, Superintendent Dr. Carl Mead, Deputy Superintendent for Operations & Support Services Dr. Heather Cordie, Deputy Superintended for T & L Michael Schofield, Associate Superintendent for Business Services		Kerry Delf, Chief of Staff Susan Rodriguez, Chief Human Resource Officer Shellie Bailey-Shah, Public Communications Officer Jessica Jones, Budget Manager Marcie Davis, Assistant to Associate Superintendent for Business Services

Livestream was made available on <https://www.youtube.com/c/BeavertonSchools>

I. Welcome and Opening Remarks – School Board Chair Tom Colett

School Board Chair Tom Colett (Board Chair Colett) called the meeting to order at 6:30 PM. Introductions of the Budget Committee commenced and roll call was taken. There were two Budget Committee Members attending via Zoom, Alok Mehrotra (Mehrotra) of Zone 4 and Christa Billings (Billings) of Zone 5. Budget Committee member Farah Mahamoud was absent. All other Budget Committee and School Board members were present.

II. Elect Budget Chair – School Board Chair Tom Colett: *YouTube: 8:06*

School Board member Becky Tymchuk (Tymchuk) nominated and Budget Committee member Susan Greenberg (Greenberg) seconded Heidi Edwards of Zone 6 be elected as Chair of the Budget Committee. Members of the Budget Committee unanimously elected Heidi Edwards (Budget Chair Edwards) as Budget Committee Chair.

III. Elect Budget Vice Chair – Budget Chair Heidi Edwards: *YouTube: 10:00*

Greenberg nominated and Tymchuk seconded Jason Hohnbaum of Zone 1 be Vice Chair of the Budget Committee. The members of the Budget Committee unanimously elected Jason Hohnbaum (Budget Vice Chair Hohnbaum) the Budget Committee Vice Chair.

IV. Budget Message: Superintendent Gustavo Balderas: *YouTube: 11:44*

Superintendent Dr. Gustavo Balderas (Supt. Dr. Balderas) described how the budget was developed to meet the needs of the students and staff with the known financial numbers currently available. Input was gathered from students, community and staff as well as the Strategic Planning and Integrated Guidance processes. There are concerns regarding declining enrollment and discontinued funding from the Elementary and Secondary School Emergency Relief Fund (ESSER) in 2024.

District Goal: WE Empower all students to achieve post-high school success.

The District prohibits discrimination and harassment based on any basis protected by law, including but not limited to, an individual's actual or perceived race, color, religion, sex, sexual orientation, gender identity, gender expression, national or ethnic origin, marital status, age, mental or physical disability, pregnancy, familial status, economic status, veteran status, or because of a perceived or actual association with any other persons within these protected classes.

The Co-Chair and Governor’s budget recommendation is \$9.9 billion. The current service level statewide is calculated at \$10.3 billion, and Beaverton School District (the District) has built the budget at \$10.1 billion. Supt. Dr. Balderas presented the 2023-24 Budget Message. A copy can be found on the [Budget Webpage](#).

V. Budget Proposal Presentation – Associate Superintendent Michael Schofield: YouTube: 17:23

Associate Superintendent for Business Services Michael Schofield (Assoc. Supt. Schofield) described the roles and responsibilities of the District administration and the Committee. A presentation was made providing information on the components of the budget, showing funding sources and uses, a breakdown of the revenue and expenditures of the General Fund.

The presentation included the significant budget modifications, which included a decrease of 90.4 positions district-wide, a 3% reduction for the Central Office and explained the shifts between ESSER funds to the Student Investment Account (SIA) and the High School Student Success (HSS) grant.

Assoc. Supt. Schofield provided information on the State School Fund (SSF), including the history and projections, and gave an economic update. The next economic update will be May 17, 2023. The reserves were addressed and results of the Budget Input & Priorities survey were shared. The District’s SIA and HSS plans were reprioritized in December 2022, as required by the Oregon Department of Education.

Key takeaways on school-based staffing, average class size, the impacts to staff and the overall budget were summarized.

Budget Manager Jessica Jones (Jones) explained the four main components of the 2023-24 Proposed Budget Document and presented key pages to the Committee. Department pages starting on page 23 is an addition to the 2023-24 budget document this year. The Proposed Budget is located on the District’s [Budget Webpage](#).

Jones also reviewed written public comments and described the next steps for the Committee.

VI. Questions and Comments from the Committee – Heidi Edwards: YouTube: 1:07:27

Live Comments from Budget Committee:

- Comments from the Budget Committee included concerns about the state revenue report coming out May 17th and the potential impact if it’s under the District’s proposed \$10.1 billion. How will PERS affect future budgets? [PERS returns have gotten better. There will be advisory meetings at the state level and that information will be shared with the Budget Committee.](#)
- The minimum 3% Central Office reduction for each department was further explained. [These are all included in the budget under the central office pages. It should be visible in the position counts but may not be seen in the financial amounts due to the COLA and step increases.](#)
- The Committee also wanted to know how much of the ESSER funding will be for staffing? [About \\$10.5 million, approximately half. The loss of ESSER will impact staffing in the 2024-25 budget. If the state funding is lower than the projected \\$10.1 billion, the vacant positions and midyear savings could help make up for it.](#)
- Considering middle school academic supports is part of the strategic plan, there is a concern about losing those positions. Important to be transparent.
- Minimum reserve funds: 5% of the General Fund and 5% of the reserves fund.

- When looking at other sources of funding, it will be important to align with the strategic plan. Smaller programs that may sound appealing could potentially become a financial drain. The smaller grants will help but it may not be possible to find a large enough grant that would help fill the shortfalls looking forward.
- The District is fortunate enough to have passed the Local Option Levy (LOL) to offset class size but with a \$1.5 billion budget, the District still has a structural deficit.
- Monthly financial report shows an 18-19% reserve.
- The LOL is dedicated to approximately 290 classroom teachers. The reduction will come from the General Fund not the levy. Most school districts do not have the LOL.
- PreK current budget is \$2.6, the proposed budget is \$2.2 million. This decreased even with the additional schools being added. The amounts referenced are only in the General Fund. [There is also PreK budget in the Grant Fund. These two lines added together shows an increase of approximately \\$500,000.](#)
- The monetary amount for assessment and interventions is approximately \$600,000.
- The difference in the Grant Fund from 2019-20 and 2020-21 is due to SIA and ESSER. Declining enrollment, will the allocation per student increase to meet operating costs? [As the ratios for enrollment decrease, the numbers won't be efficient across all buildings due to standard overhead.](#)
- Survey results show class size as the highest priority. Is there a way to measure the value of the investments? [Challenging to keep reductions away from the classroom as well as maintaining support to the schools from Central Office departments. Efficiency in the alignment of programming would include K-12 assessment and intervention programs to ensure all students are succeeding.](#)
- Would like to see more information on mental health spending. [A Behavioral Health and Wellness model has been formed and is funded in various locations. The new strategic plan will look at the major initiatives to undertake. Moving forward in a standard year \(prior to COVID\), investments will be measured by the effectiveness, then make decisions about future investments.](#)
- The possibility of social workers being funded by the state and county was discussed.
- The Government Finance Officers Association (GFOA) recommends having three months of operating costs for emergencies which is approximately 25% of the General Fund budget. Current ending fund reserves are only 20% and will be less if the SSF budget comes in at \$9.9B and more reserves are used in the 2024-25 school year.

Assoc. Supt. Schofield encouraged the Committee to ask questions or request informational meetings as needed.

VII. Public Comment – Budget Chair Heidi Edwards: [YouTube: 1:38:57](#)

Any questions or comments received by May 8, 2023 were submitted to the Committee as public testimony. All were presented to the Budget Committee during the presentation and can be viewed on the [Budget Webpage](#).

Budget Chair Edwards described the testimony protocol.

The Budget Committee accepted live testimony on the elimination of a stipend for a Rachel Carson facilitator via Zoom and in person. Comments were also presented on the importance of Behavior, Health and Wellness programs.

VIII. Summary for May 17th Meeting – Jessica Jones: [YouTube: 1:55:02](#)

Jones summarized the agenda items for the next Budget Committee meeting on May 17th. Written public testimony will be provided at the May 17th meeting. Please submit Budget Committee questions by 5:00 PM, Monday, May 15th.

Budget Chair Edwards reminded to advocate for the \$10.3 billion state school fund with the legislatures.

IX. Closing Remarks – Supt. Dr. Balderas: *YouTube: 1:57:52*

Supt. Dr. Balderas shared closing remarks with the Committee. Please continue to advocate with elected officials and lobbyists.

Budget Chair Edwards adjourned the Budget Meeting at 8:27 PM. Budget Vice Chair Hohnbaum motioned, and Greenberg seconded the adjournment.

Heidi Edwards, Budget Committee Chair
Budget Committee Chair

Submitted by Marcie Davis