

## BUDGET OVERVIEW

### FY19-20 Amended Budget

FUND	(000's)
General Fund	\$166,100
Special Revenue Fund	33,004
Debt Service Fund	18,194
Health Insurance Fund	22,500
Trust and Agency Fund	4,399
Capital Projects Fund	252
<b>TOTAL</b>	<b>\$ 244,449</b>

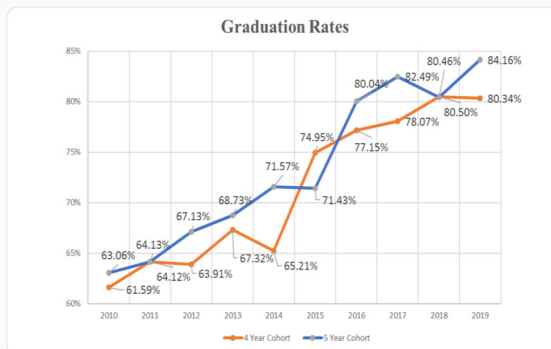
### Key Performance Measures

The State of Oregon, along with several other states, uses **Smart-er Balanced Assessments** to annually assess students' progress towards meeting the rigorous Common Core State Standards. Students take the assessment in Math and English Language Arts in grade 3 through 8 and again in grade 11. The Medford School District continues to see increasingly better results year after year in these areas.

We know that students who are **reading** on grade level at the end of the 3rd grade have more likelihood of successful progression through our K-12 system and remain on track for graduation. The iReady assessment is administered to assess this. While the progress has varied year to year, we are seeing incremental gains in cohort growth. Principals and teachers use the data to make informed decisions throughout the school year. Research has proven that student achievement is inextricably linked to attendance. The District implemented the Attention2Attendance (A2A) program as a tool to track attendance and as a whole has increased its emphasis on the link between student attendance and student achievement.

The District simultaneously set in motion the development and expansion of focused **Career Pathways** to ensure that every student finds his/her place in our schools based on each student's interests. We believe that students are most successful when they affiliate with a chosen pathway, where they make connections, find meaning, and ultimately create understanding in their daily school lives. We want all students to be in environments where they have a common mission, are connected with like-minded students, are surrounded by caring adults, and participate in co-curricular activities that they look forward to after school, on weekends and during breaks. We believe the Career Pathways strategy is a long-term strategy that will result in graduation rate gains that will push graduation beyond the 80% threshold established by the board.

Our **graduation rate** has shown tremendous growth over the last 5 years. 80.34% of the Class of 2019 graduated from high school in four years,



## DISTRICT MISSION AND CORE GOALS

### Mission Statement

To foster the talents and interests of a community of life-long learners through a meaningful education that challenges students to reach their unlimited potential.

### Core Goals

The Medford School Board reviews, revises and approves its goals for the District annually. Below are the current goals.

#### 1. Extend student learning beyond proficiency by encouraging ALL students to attain mastery of all Oregon State Academic Standards.

We want our students not only to meet academic standards, but also to grow beyond minimum levels of proficiency.

#### 2. Promote a school environment of equity in which ALL students find connections, meaning, and understanding in their daily school experiences.

Secondary students will be affiliated and connected to school pathways (sequences of courses, programs, co-curricular activities, post-secondary connections) of their choosing, in which they express interest and find relevance.

#### 3. Ensure that each elementary student reads at grade level by the end of the 3rd grade.

Beginning in Kindergarten, all students will be assessed in reading and will be provided with any and all necessary instruction and interventions to ensure each student reads at grade level by the end of the 3rd grade.

#### 4. Accelerate the learning for ALL students who perform below grade level, bringing them up to grade level by the end of the school year.

ALL struggling students will be afforded the opportunity to receive specific, focused, and individualized interventions to ensure they perform at grade level in all academic areas by the end of the school year.

#### 5. Increase the graduation rate.

A high school diploma is the foundational credential. We want our students to complete a rigorous and focused academic program of studies, earn a credentialed diploma whereby each student can earn dual credit, articulated credit, or an industry certification, and have a credible working plan for their growth and training at the post-secondary level. We expect an annual district graduation rate of 80% by 2017, 90% by 2020, and 100% by 2025.

School system performance is monitored regularly to ensure that reasonable progress is being made toward achieving these goals. This budget attends to these goals as well as all federal and state requirements for public schools.



## ADOPTED BUDGET 2020 - 2021



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## SUPERINTENDENT'S MESSAGE

### Dear Medford Community Members:

I am pleased to present my budget message for the 2020-21 school year. Thank you to the members of the Medford School District Board of Education and the members of the Medford School District Budget Committee for their service, support, analysis, and consideration of this proposed budget.

In the Medford School District, we are guided by a shared vision that ALL are learning, and learning is for ALL. Never has that shared vision been more alive than in the past two months.

Quite frankly, we are in extraordinary times. The COVID-19 pandemic and subsequent measures put in place to keep us safe may be eventually seen not only as a defining moment in our history, but also as the single greatest catalyst for change in K-12 education since free and compulsory education was introduced in the United States at the turn of the 20th century.

As news of the pandemic spread this spring, schools across Oregon were in the process of preparing expansion plans as part of the Student Success Act (SSA), funded by the recently adopted corporate activity tax, which promised to push schools into what many believed would be a quality education funding model. Nearly overnight, news of the coronavirus spread and social distancing practices upended our economic construct and unbalanced our funding expectations.

That said, by preparing a budget that assumes receiving all we previously anticipated, we get to present an aspirational budget. This plan was informed by the work of literally hundreds of people. We surveyed nearly 4,000 students, parents, and staff in our district and assembled a strategic planning team of 70 individuals who represented a cross section of our school and community. (I am truly grateful for their work to inform this plan.)

The budget team helped form what we are calling the \$9 billion budget, which aligns with the original 2019-21 K-12 biennium budget passed by the legislature. Other than a few shifts in full time equivalents (FTE) from one area to another, we built the budget assuming all programs funded by our general fund would remain largely unchanged. The cost to fund this "status quo" plan is higher than last year simply due to employee pay increases and increases in benefit costs. No other significant increases in costs were scheduled.

The proposed budget includes the use of \$2.078 million of the \$11.953 million beginning general fund reserves due to three one-time initiatives. Two of the three one-time initiatives, remediation (\$1.0 million) and additional custodial disinfecting (\$0.58 million) are driven by COVID-19. The third item is the opportunity to secure a \$2.5 million seismic grant for the Central Medford High School gymnasium, which requires a \$0.5 million dollar contribution from the general fund.

The first one-time spending initiative is driven by our plan to provide remediation services for our students most impacted by learning disruptions due to stay at home orders. This will add 10.0 FTE hours to the budget focused on identifying and addressing student gaps in learning from the COVID-19 shelter in place order.

The second one-time initiative for additional custodial disinfecting is driven by our requirement to keep students and staff safe: daily disinfecting of teaching and working areas. This initiative will require not only the proposed addition of 8.0 custodial FTE, it will also require participation from staff and students to be effective.

Respectfully,

Dr. Bret A. Champion, Ed.D., Superintendent

## DISTRICT PROGRAMS

### Elementary Non-Charter Education

The Medford School District has non-charter elementary schools ranging in size from approximately 195 to over 700 students. All of the schools are Kindergarten through 6th grade, with the exception of Ruch Elementary School, which is Kindergarten through 8th grade. Eight of the elementary schools will receive federal Title I funding in FY20-21, which helps provide additional academic support for economically disadvantaged students. All of the Medford schools follow a common curriculum that is aligned with Oregon State Standards. Curriculum materials are also similar in the schools. Every student receives music instruction each week from a licensed music teacher. Additionally, students in sixth grade may take band or orchestra classes before or after school. All students have access to libraries and computers for research, study and production. English Language Development and after school programs are provided.

### Secondary Non-Charter Education

The Medford School District boasts two Middle Schools and three High Schools, providing a wide variety of course offerings to meet the diverse needs of all students.

Hedrick and McLoughlin Middle Schools enroll nearly 2,200 students total for grades 7 and 8. The 6th grade academy launched in FY17-18, and in FY19-20 there was approximately 270 6th graders at Hedrick or McLoughlin, a Title I school. Both schools are organized around evidence-based learning teams, providing students a smaller integrated learning community where students and staff develop strong supportive relationships. Electives in art, music, foreign language and other exploratory topics supplement the core content subjects that are supported with intervention or enhancement periods depending on individual student skills.

North and South Medford High Schools are fully accredited, OSAA schools with the total enrollment for both schools at approximately 3,800. Both schools offer a full comprehensive education with Freshman Academy learning teams to ensure the best opportunity for student success from day one. With increasing graduation requirements, both high schools have rigorous programs of study with supportive interventions when students need extra help. Central Medford High School is a Title I school and is our accredited alternative school for grades 11-12 that fills the gap for students who fall behind or simply need a smaller school that can adjust to individual learning styles.

### Charter Schools

The District has four charter schools. Madrone Trail Public Charter School is a K-8 Waldorf-inspired school. Logos Public Charter School provides a customized K-12 instructional program for home-schooling families. Kids Unlimited Academy (KUA) is a Public Title I Charter School offers grades K through 6. Its instructional program focuses on high needs youth who are more at risk of educational failure because of poverty, homelessness, or home language other than English. Valley Charter School offers classes in grades 6-8, with an emphasis on Science, Technology, Engineering and Medicine (STEM).

### Special Programs

Parents looking for additional resources to support their child with special needs will find help at the Medford School District. We offer a wide variety of services to meet these students' needs. Highly trained staff assist in evaluating a child's situation and help find the best resources to ensure the most appropriate and successful educational experience.

### Transportation and Food Service

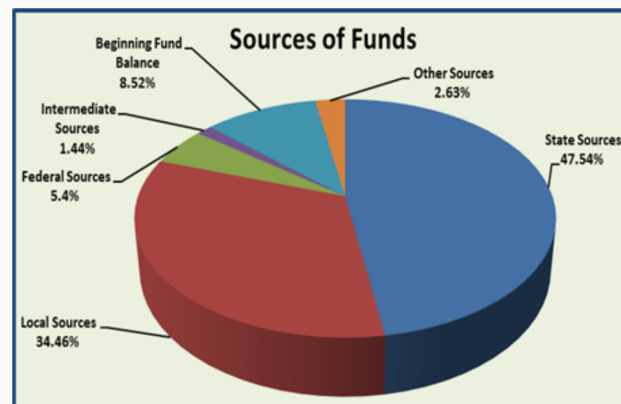
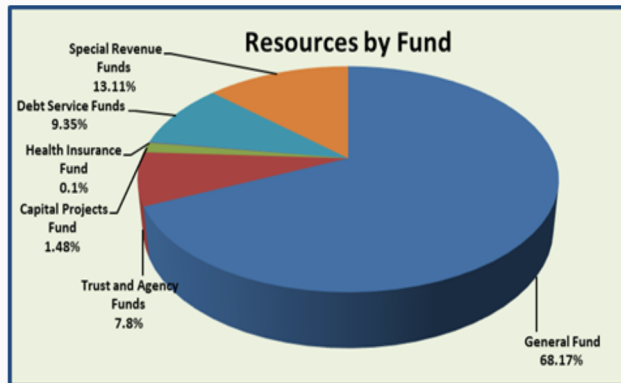
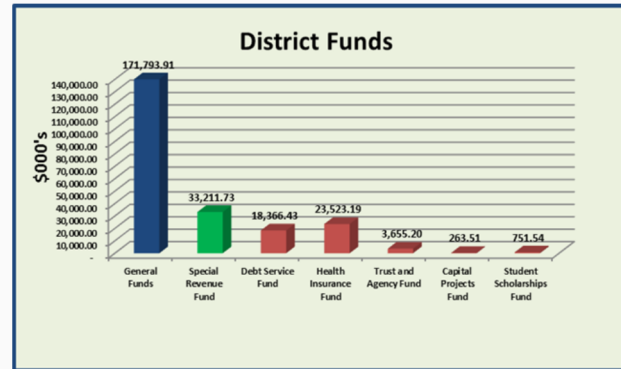
The District maintains service agreements with First Student and Sodexo. First Student provides home-to-school and athletic event transportation services. Sodexo provides food services at all schools in the District.

## SOURCES OF FUNDS

### Sources of Funds

In FY20-21, the Medford School District anticipates having resources of \$251.56 million, with approximately \$201.8 million (80%) coming from state and local funding. The General Fund is increasingly becoming the primary funding source for District spending. In the FY20-21 Budget, the General Fund represents 68.29% of all resources versus 67.95% in the FY19-20 Amended Budget.

### Resources



## USES OF FUNDS

### Uses of Funds

The FY20-21 Budget is built upon the program and service objectives articulated by the Board of Directors. The Medford School District's combined staffing, operating and capital budgets total \$251.56 million, an increase of \$7.1 million (2.9%) from the FY19-20 Amended Budget. See the charts and commentary below for further details.

### Requirements by Category

	FY18-19 A	FY19-20 B	FY20-21 B
Student Instruction	\$102,099	\$110,911	\$116,971
Support Services	72,591	73,296	76,647
Community Services	5,737	6,081	6,081
Facilities	4,890	3,966	4,280
Debt Service	16,646	16,806	16,981
Transfers	10,733	7,294	6,925
Contingency / Fund Balance	24,133	26,095	23,680
<b>TOTAL</b>	<b>\$236,829</b>	<b>\$244,449</b>	<b>\$238,240</b>

Notable changes in requirements include:

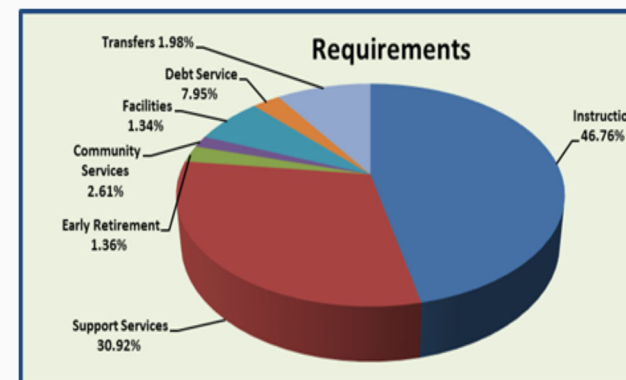
#### Student Instruction / Support Services / Community Services:

Expenditures are budgeted at \$199.7 million, \$9.4 million higher than the FY19-20 Amended Budget, primarily driven by contractual compensation increase assumptions for step increases, a cost of living increase, a 26.72 increase in FTE and a \$1.5 million increase in purchased services, mainly from the Charter school pass-through. Of the \$9.4 million increase, \$6.0 million is from instruction and mainly due to contractual wage and benefit increases, and \$3.35 million is from support services.

**Facilities:** Expenditures are budgeted at \$4.28 million, \$0.3 million more than the FY19-20 budget. At the time of the budget the Facilities department has 15 projects planned for the FY20-21 year in an effort to keep our schools functioning properly, safe and visually pleasing.

**Debt Service:** The budget of \$16.9 million is up \$175K from FY19-20, which is relatively flat and is made up of our pension and general obligation bonds.

**Transfers / Contingency / Fund Balance:** Budgeted at \$30.6 million, there is a \$2.78 million reduction from the FY19-20 Amended Budget. This is chiefly the result of a \$4.8 million decrease in transfers from the GF to Special Revenue (SR) and spending down of SR Project reserves, PERS Reserves and Food Service Reserves.



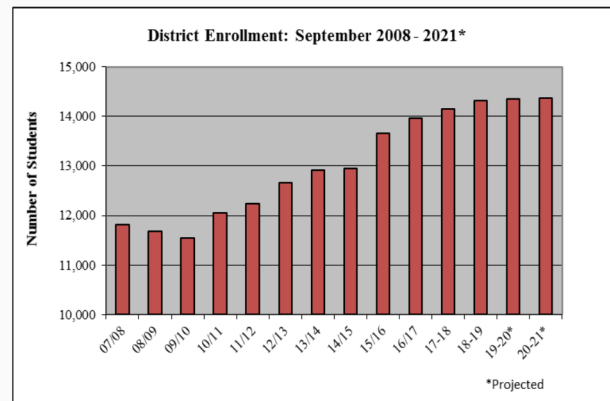
## ORGANIZATION

### History

Jackson County School District 549C, also known as the Medford School District, is the eighth largest in Oregon. Serving approximately 14,372 students, the District enrolls approximately 2.4 percent of the total K-12 student population in the state.

The District, formed in 1959, is located in Jackson County and includes most of the City of Medford, the City of Jacksonville, portions of the City of Central Point and unincorporated areas of the county. Situated in the Rogue River Valley, the District extends beyond the City of Medford's urban growth boundary and encompasses approximately 361 square miles.

The District operates two comprehensive high schools, two middle schools, fourteen elementary schools, one alternative high school and four charter schools. Excluding charter schools, projected enrollment for FY20-21 reflects an increase of 1,130 students for the decade from FY09-10 to FY20-21B. The chart below includes charter schools:



### Governing Board

The District is governed by a seven member Board of Directors elected by the community. Each director serves a four year term, with elections occurring every 2 years. The Medford School Board recognizes that it has a unique and important role to play in assuring that the school system achieves the results expected by the community and deserved by the students. Additionally, the Board and staff understand the significance of fiscal integrity and accountability.

### Organizational Structure

The District is organized around six key functional areas designed to deliver high quality education and support to our students. The FY20-21 Approved Budget includes a 26.72 FTE staffing increase from the FY19-20 Amended Budget, primarily driven by a 6.75 FTE increase in non-SpEd and 20.0 FTE increase in SpEd.

### Employees (FTE's)

FUNCTIONAL AREA	FY19-20B	FY20-21B	Change
Direct Student Instruction	977.70	989.70	12.00
Direct Student Support	74.41	79.41	5.00
Direct Staff Support	32.69	32.69	0
School Management	118.32	121.04	2.72
School Operations and Maintenance	96.47	104.47	8.00
Technology	26.00	25.0	<1.0>
<b>TOTAL</b>	<b>1,290.36</b>	<b>1,279.39</b>	<b>26.72</b>