Priority 1 Progress Report

Eagle Point School District 9 - Jim Helmen, Superintendent
Reporting period: September 1–October 21, 2026

Building a destination district in Southern Oregon

Our goal is for Eagle Point to become a district where families choose to enroll and remain, students receive a strong education, and staff choose to work. This Priority 1 report explains the work completed and underway during September and October, organized under the Superintendent and Board's four shared goals. August planning is included as background to this reporting period.

Why this work is necessary

We are losing enrollment at a reported rate of approximately one student per day. Current withdrawal information indicates that students are primarily leaving for online programs. We are reviewing withdrawals and student needs while developing systems to retain students, bring students back, and support staff. Declining enrollment puts pressure on revenue and may create a financial shortfall if spending commitments exceed available funding. The size and timing of that risk must be established through enrollment reconciliation and financial forecasts.

Attendance, behavior, instruction, family engagement, customer service, and program options affect the daily experience of students and families. Our work is to make these systems consistent, identify problems earlier, assign responsibility, and check whether the response works. The communications plan developed this year will help families understand district options and what EPSD offers students. Consistent financial controls are necessary to ensure available funds are approved and spent for their intended purpose.

Progress during this reporting period included completed WE culture commitments, individual leadership meetings, school and classroom visits, readiness for the October 20 school systems review, and continued work on instruction, engagement, safety, communication, and financial procedures. Completed activities, procedures being developed, and next steps are identified below. The October 20 review and Quarter 2 results are still ahead.

Alignment to shared goal 1

Cultivate a High-Performing District Culture of Trust, Accountability, and Service

Leadership framework and August preparation. The beginning-of-year DLT retreat established a shared focus on district priorities, leadership expectations, and the adult practices needed to improve student outcomes. This August preparation provided the framework for September–October implementation. The framework clarified districtwide expectations, principal discretion, and when to seek district support. It established the expectations Students First; Relationships Before Programs; One District, One Team; High Accountability with High Relationships; Communicate Early; and Own Results.

Four Pillars completed. All administrators and the district office completed the Four Culture Pillars work around Respect, Trust, Collective Accountability, and Customer Service. This work translated shared values into observable commitments for leaders to reinforce through daily interactions, staff meetings, recognition, and coaching.

School systems ready for review. Progress checks completed during this reporting period indicated that all administrators were ready to present their schoolwide systems at the October 20 DLT meeting. The Systems in Action framework connected Attendance and Belonging, Student Behavior, Family Engagement, Customer Service, and Instructional Improvement to measurable goals, adult routines, assigned ownership, evidence, and follow-up.

Leadership improvement tools developed. A 90-day Problem of Practice process and cross-school administrator PLC structure were developed. Administrator feedback informed the DLT learning plan. Clarified director responsibilities and a Cabinet review tool provided a structure for recording decisions, assigning responsibility, and following up across schools and departments.

Principal meetings and individual support completed. I established a yearlong meeting schedule with principals focused on district priorities and leadership development. Since the start of the school year, I met individually with every principal and director one to two times. These meetings provided time to review expectations, discuss school or department needs, and identify district support.

School and classroom visits completed. I accomplished my goal of visiting every school and classroom by October. These visits provided direct information about school conditions, classroom practices, and needs identified by staff.

Employee culture and organizational health. A staff culture baseline survey has been drafted to examine shared purpose, expectations, collaboration, consistency, learning, and belonging and will sent out in Early November. HR-related work also focused on clear hiring, evaluation, and workplace procedures. Employee engagement and retention results remain an upcoming evidence checkpoint.

Next steps and evidence

Review school evidence on October 20 to identify progress, inconsistent implementation of priority systems, and needed supports for adminstrators. Confirm each administrator's 90-day baseline and aim and organize the three PLC checkpoints. Continue the yearlong principal meetings, individual support, quarterly reviews, and visits toward the twice-per-school goal. Establish the employee culture baseline with HR and document staffing trends and follow-up on concerns.

Alignment to shared goal 2

Accelerate Student Achievement Through Instructional Excellence

The instructional focus was to connect district performance expectations, the EPSD strategic plan, and SB 141 targets with the routines principals and staff teams use to improve learning outcomes on state and local assessments. This included protecting instructional and collaboration time, using student evidence, and identifying clear actions when students need additional intervention.

Instructional leadership expectations. Administrator training and implementation guidance established expectations for classroom presence, walkthroughs, coaching and feedback, PLC participation, and review of assessment, attendance, behavior, grades, and intervention information. The school systems framework required principals to show the adult practices they are monitoring and the evidence they will use to judge progress.

Achievement targets established. As background, Valerie Cordle-Shehorn and I met with SOESD representatives on August 5 about district performance growth targets. EPSD submitted its proposed targets, and ODE approved them. The approved targets established improvement expectations for graduation, ninth-grade on-track status, eighth-grade mathematics, fifth-grade science, third-grade reading, and attendance. Board materials explained starting points, multiyear targets, and how they relate to instruction, school improvement, and resource decisions.

PLC and assessment work underway. School and department updates documented the beginning of Year 3 of district PLC work, including protected collaboration time, team norms, unit planning, and review of student-learning evidence. Fall benchmark windows were established across grade levels. Schools worked on reviewing diagnostic assessment results, identifying instructional priorities, and planning MTSS intervention responses. That work will continue as assessment findings are reviewed.

School improvement tools developed. The Systems in Action framework connected the five district priorities to principal systems and goals. It outlined how schools would identify a baseline, set a measurable goal, assign an owner, establish a repeatable routine, and review implementation and impact. Administrators may select Instructional Strategies and Improvement as their 90-day Problem of Practice (POP).

These tools gave principals and their teams a way to turn district priorities into daily practice. The tools called for each school to identify its starting point, needed improvement, responsible staff, and progress checks. District leaders can use that information to address inconsistent practices and direct support and resources where needed.

The 90-day POP process established a defined period for administrators to test a leadership change and determine whether staff practice and student learning improve. More consistent school experiences support student retention, family confidence, and the destination district goal.

Online options under development. I worked with URCEO on developing additional K–5 and secondary online options within a broader K–12 pathway. We spoke with Evergreen, which serves K–12, and Learn at Home Oregon about elementary and middle-grade options. Planning addressed the need to confirm grade coverage, services, costs, and availability. The purpose was to meet current family needs and provide options that may help retain students and support their return.

Online enrollment requirements. Two programs alone do not authorize a blanket end to outside online enrollment. Under ODE guidance, denials of out-of-district virtual public charter enrollment depend on the enrollment threshold, policy, notice, exceptions, and appeal requirements. Two or more public, tuition-free online options must be available to the individual student. [1]

Program reviews assigned. Division 22 review assignments covered instructional requirements and evidence, including TAG, assessment, alternative education, and instructional time. The assigned reviews were intended to identify missing evidence and needed program improvements. Completion of the review and corrections remains follow-up work.

[1] ODE, Virtual Public Charter School Enrollment School District Guidance, updated November 2025, pp. 3–6. ODE guidance

Alignment to shared goal 3

Inspire and Deepen Student Engagement

Our engagement work connected attendance, belonging, behavior, family partnership, and learning opportunities. The emphasis was on consistent adult responses, early support, and follow-through with students and families.

School attendance systems prepared for review. District guidance established a process for identifying attendance concerns, connecting with students and families, determining barriers, assigning support, and checking results. School tools specified an action, assigned adult, and follow-up date. Progress checks indicated that all administrators were ready to present their systems on October 20; that review will examine implementation evidence and remaining needs.

Student Services support underway. Student Services worked on coordinating the Early Leaver process with district attendance priorities, establishing reporting dates, reviewing weekly 10-day absence reports, and providing schools with timely, consistent guidance. This work remains ongoing. This work was intended to identify students sooner, strengthen family follow-up, and provide accurate information for enrollment and staffing decisions. Amy Martin and Chris Valavala led this work, and I appreciate their direct support to schools.

Statewide attendance participation. EPSD began participating in statewide attendance cohort, providing an opportunity to contribute to decisions affecting attendance practices statewide and bringing back best practices to EPSD. Amy will bring back practical strategies and lessons from other Oregon districts to support consistent school data, earlier identification of student needs, and student and family support. This supports the Board's goals for achievement, engagement, belonging, and districtwide systems.

Behavior expectations and principal support. Leadership training emphasized explicitly teaching expectations (PBIS and Love and Logic), applying the District Behavior Matrix consistently, reviewing patterns, and using re-entry and repair practices. We also developed practical guidance for school administrators, clarifying how principals and non-administrator disciplinarians can coordinate first response, supervision, staff communication, and follow-through.

Family engagement and customer service. School implementation tools established a 48-hour response expectation, ownership of the next step, and follow-up to close the loop. They also called for schools to use family feedback, address participation barriers, and collect evidence of proactive communication. School updates described communication through ParentSquare, newsletters, open-house planning, PTO connections, and family learning activities.

Student retention work underway. During this reporting period, we worked on reviewing why students left, reconciling withdrawals and destinations, identifying families who might return, and making reentry personal and practical. This work will continue in Quarter 2. URCEO online-program planning and the yearlong communications plan are intended to help families understand available programs, activities, and career pathways. A plan to contact all families who have left the district will be developed during Quarter 2.

Programs and staff support. District engagement work included athletics, activities, FFA, CTE, and hands-on learning. September department updates announced the Southern Oregon Head Start partnership to bring a program to Table Rock Elementary. I worked with the high school principal on leadership skills for supporting staff, specifically in CTE and FFA. This work addressed communication, problem-solving, financial ownership, required approvals, and accountability.

Assessment follow-up. Fall benchmark scheduling and PLC expectations provide a foundation for identifying learning needs. The interim assessment plan remains to be finalized, including how results will lead to instructional responses and student support.

Next steps and evidence

Review October 20 attendance, behavior, family engagement, and customer-service evidence. Establish baselines and dashboards; track student-group patterns and support results. Inventory career-connected and cross-age opportunities, identify gaps, and report progress toward two additional high-value opportunities and one sustainable cross-age experience.

Alignment to shared goal 4

Optimize Operations, Fiscal Health, and Community Trust

A major focus has been strengthening the systems that help EPSD make financially responsible decisions while providing responsive service to staff. Stronger documentation, clearer systems and authority, and reliable follow-through support our ability to protect staffing and programs as enrollment and state funding projections create pressure.

Requisition guidance and support developed. Work with Business Services addressed missing supporting documentation, unclear funding sources, approval questions, purchasing cards, cash handling, and reconciliation. Examples and guidance were developed to show schools what a complete requisition should include: the purchase and its purpose, vendor documentation, funding source, required approvals, and fundraiser documentation when applicable.

Purchasing procedures being formalized. We worked on clarifying how requisitions should be submitted and how missing information should be resolved before purchases proceed. Related work addressed purchase documentation, reimbursement timing, the fiscal year in which expenses belong, and tracking spending commitments. The purpose was to verify the appropriate account and available funding before the district commits funds. Consistent implementation and shorter approval times still need to be demonstrated along with maintaining healthy staff support through a difficult process.

Staff communication prepared. We prepared a staff message that explained purchasing delays, acknowledged the impact on classrooms, described improvements underway, and thanked staff for their patience. We developed an option that If an urgent classroom purchase is held up, the principal can contact Gwen in Business Services for help and she can support in purchase while correct documentation is in process. This provides a support pathway while documentation and approval procedures are being improved.

Student body guidance developed. Guidance developed for elementary schools and athletics-related questions addressed account classification, fundraiser forms, purchasing approvals, collections, deposits, and reconciliation of income and expenses. The source and intended use of funds must be documented and confirmed with Business Services. A separate fundraiser account label does not by itself establish what the funds may be used for and provide inequitable practices which ultimately negatively impact students.

Student body account verification system development remains underway. Account review must verify income, deposits, expenditures, outstanding commitments, and available balances, with written follow-up on discrepancies. These records show what money is available, its intended purpose, and who may approve spending. Student activity balances must be reviewed for their authorized uses rather than treated as unrestricted funds for a general operating shortfall. Through audit review this is an area of improvement and we have worked hard to develop a functional system to support this while working to limit impact on students.

Enrollment and financial planning underway. We reviewed enrollment by school and districtwide alongside staffing, programs, state funding projections, contractor costs, and staff-development allocations. Work during this period also addressed reimbursement timing and fiscal-year treatment. Enrollment review and financial planning remain ongoing. Accurate spending and account records help identify commitments and remaining resources as we prepare budget options before planning begins in January. Better controls cannot replace lost enrollment revenue, but they provide the information needed to respond to a possible shortfall and limit avoidable costs. Verified savings and forecast results will be reported when available.

Financial follow-up

Verify requisition documentation and approval practices, complete student body system and reconciliation and written follow-up, and document unresolved issues. Use reconciled enrollment and financial forecasts to identify any projected shortfall and needed corrective action. Report verified purchasing improvements, savings, and avoided costs.

Alignment to shared goal 4 continued

Safety, facilities, and community communication

Safety procedures and pickup review. August DLT training covered reporting responsibilities, cybersecurity, transportation checks, building security, access control, and incident procedures. During September, school reports documented safety routines and drills, and electronic student and staff injury reporting was implemented. I worked toward visiting every school during pickup to evaluate routines and safety; visits to all schools remain to be completed. Other work addressed district volunteer background checks, agreement authority, field-trip forms, media access, and student privacy.

Community presence and communication. During this reporting period, I met with a number of business owners and Eagle Point graduates and attended multiple athletic events and districtwide activities. I made visibility and availability in the community a priority. Listening conversations also included staff, families, students, and other community members. Themes included community pride, academic expectations, welcoming schools, communication, and follow-through. I worked with the communications department to develop a yearlong plan highlighting district programs and the options available to families. Implementation of that plan continues into Quarter 2.

Facilities and compliance review. Facilities planning included consideration of a wrestling-room proposal, with contracts and work awaiting further review. A Division 22 tracking workbook was developed to assign reviewers, organize evidence, identify gaps, and document corrective action, including review of safety and emergency-planning requirements.

Next steps and evidence

Continue pickup safety visits. Confirm current school emergency plans and complete the two district preparedness reviews. Prioritize facility needs with projected costs and funding options. Schedule formal community listening opportunities and record significant feedback, the responsible district leader, and follow-up status. Carry out the yearlong communications plan.

Next steps and evidence for Quarter 2 reporting

During Quarter 2, I will focus on using fall assessment results and school implementation evidence to identify where students need additional support and where district systems need improvement. This work supports the Board's goals for student achievement, engagement, responsible financial management, and becoming a destination district in Southern Oregon.

Attendance, behavior, and family engagement. We will review school evidence presented at the October 20 DLT meeting in attendance, behavior, family engagement, and customer service. We will establish baselines and regular dashboard reporting, review patterns across student groups, and check whether assigned supports are working. Findings will guide school adjustments and district support.

Student achievement and instructional support. We will complete the review of fall norm-referenced assessment results and assign an action, responsible person, and follow-up date for significant findings. We will review evidence of PLC effectiveness, district walkthroughs, the instructional coaching model, and K–5 literacy and mathematics support. We will also finalize the interim assessment plan for grades 3–8 and 11, specifying what each assessment measures, when it is administered, and how staff will use the results. Winter and spring reviews will help determine whether instructional changes are improving student learning.

Program options and student retention. We will continue online-program planning and develop a plan to contact all families who have left the district. The purpose is to understand their reasons for leaving, identify options that could support their return, and use their feedback to improve instruction, communication, student support, and school procedures. We will also inventory career-connected and cross-age learning opportunities, identify gaps, and document progress toward two additional high-value opportunities and one sustainable cross-age experience. These efforts support student engagement and give families more reasons to choose and remain in EPSD.

Financial systems and budget preparation. We are formalizing Business Services procedures to make general fund purchasing approvals and student body accounting more consistent and efficient. The focus is clear documentation, appropriate approvals, accurate account balances, and reliable tracking of spending commitments. We are also reviewing enrollment at each school and districtwide to develop budget options before planning begins in January. With declining enrollment, accurate financial and student information is necessary to identify potential shortfalls early and make informed decisions about staffing and programs.

Quarter 2 reporting will identify completed work, remaining gaps, assigned follow-up, and the evidence available to assess progress.