

**Yoncalla School District
BOARD OF DIRECTORS
REGULAR MEETING
January 18, 2024
292 5th Street
Yoncalla School Board Meeting Room
Yoncalla, OR 97499**

School Board meeting is also be available on Facebook Live.

<https://www.facebook.com/yhseagles/>

School Board email: ysd.schoolboard@yoncalla.k12.or.us

6:00 PM

CALL TO ORDER

- I. **AWARDS, RECOGNITION AND CORRESPONDANCE.** Student of the Month Awards to Tori Noffsinger, Bethany "Hope" Meza, Aaron Malone, Paisley Swesso, Ethan Graham
- II. **PUBLIC FORUM**
The public is invited to attend board meetings, and will be given a limited time of 3 (three) minutes per person to voice any opinions or problems, except that public or board criticism of district personnel will be heard only in executive session. Such items should be brought to the attention of the superintendent at least 5 (five) business days prior to the board meeting. Public Forum will be limited to 30 minutes.
- III. **ADJUSTMENTS TO THE AGENDA**
- IV. **AUDIT REPORT** - Presented by Kelsey Pardon, of Neuner, Davidson & Cooley, LLC
- V. **CONSENT AGENDA**
 - A. Minutes of the November 16 and December 13, 2023 Board Meetings
 - B. Accounts Payable/Funding Update
- VI. **DISCUSSION ITEMS**
 - A. OASTL Correspondence
- VII. **REPORTS**
 - A. High School Principal Report
 - B. Elementary Principal Report
 - C. Preschool Report
 - D. YEPs, Booster Club Reports
 - E. Financial Report
 - F. Superintendent Report
- VIII. **PRESENTATION**
 - A. Early Learning Literacy Report
- IX. **ACTION ITEMS**
 - A. Consider for Approval 2023 Clean School Bus (CSB) Rebates Program in partnership with MidColumbia Bus Company
- X. **ANNOUNCEMENTS**
 - A. Next board meeting, February 15, 2024
- XI. **OTHER BUSINESS**
- XII. **RECESS TO EXECUTIVE SESSION**
 - A. The board will meet in Executive Session under ORS 192.660(2)(b) to consider the dismissal or disciplining of, or to hear complaints or charges brought against, a public officer, employee, staff member or agent, unless he or she requests an open meeting.
- XIII. **RECONVENE AND ADJOURN**

Yoncalla School District
BOARD OF DIRECTORS
REGULAR MEETING MINUTES
November 16, 2023
292 5th Street
Yoncalla School Board Meeting Room
Yoncalla, OR 97499

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School Board Email: ysd.schoolboard@yoncalla.k12.or.us

BOARD MEMBERS PRESENT

Cathey Grimes, Chair
Della Orcutt, Board Chair
Fawn Sybrant
Lisa Frasier
Twila McDonald

ADMINISTRATION PRESENT

Brian Berry Kelly Cook-Absent
Erin Helgren Cody Reed
Chelsea Ross Laurie Simlness
Megan Barber

- 6:00 PM CALL TO ORDER.** Chair Grimes called the meeting to order at 6:00 PM, followed by the Pledge of Allegiance. In addition to families, students and staff, Marge Cunningham and Betty Heap were also in attendance.
- I. AWARDS, RECOGNITION AND CORRESPONDANCE.** Student of the Month Awards were presented to Olivia Simmons, Kamryn McCoy, Elsa Baker, Gary "Junior" Bash, Kaitlynne Ramos
- PUBLIC FORUM**
- II. The public is invited to attend board meetings, and will be given a limited time of 3 (three) minutes per person to voice any opinions or problems, except that public or board criticism of personnel of the district will be heard only in executive session. Such items should be brought to the attention of the at superintendent at least 5 (five) business days prior to the board meeting. Public Forum will be limited to 30 minutes.** None.
- III. ADJUSTMENTS TO THE AGENDA.,** Action Item E, Consider for Approval NFHS Network School Broadcast Program. Director Orcutt made a motion to approve the agenda as adjusted, Director Sybrant seconded, passed unanimously.
- IV. CONSENT AGENDA**
- A. Minutes of Board Meeting, October 19, 2023
 - B. Accounts Payable/Funding Update
 - C. Hiring of Richard Noffsinger for Middle School Girls Basketball Coach
- Director Orcutt made a motion to approve the consent agenda, Director Sybrant seconded, passed unanimously.
- V. DISCUSSION ITEM.**
- A. OSBA Annual Convention Recap. Board members Grimes, Orcutt, and Sybrant, along with Administrators Berry and Helgren shared their feedback regarding the 2023 OSBA Convention. The feedback of all attendees was overall very positive, especially regarding the keynote speakers, as well as the different breakout sessions.
- VI. REPORTS**
- A. High School Principal Report-Chelsea Ross
 - B. Elementary Principal Report-Erin Helgren
 - C. Preschool Report- Megan Barber
 - D. YEPs, Booster Club Reports-Madison Kokos
 - E. Financial Report
 - F. Superintendent Report-Brian Berry

VII. PRESENTATION. SIA Report. Superintendent Berry shared a Power Point presentation on the Student Investment Account, to let the board and the community know where the money from this account has been spent. Approved in 2019, money from this account could be spent on increased instructional time, improving student health and safety, reducing class size, and well-rounded education. This report will also be posted on the district website.

VIII. ACTION ITEMS.

- A. Action Item A, Consider for Approval Wrestling Co-op with North Douglas High School, for Boys and Girls Wrestling. Director McDonald made a motion to approve the Wrestling Co-op with NDHS, Director Frasier seconded, passed unanimously.
- B. Action Item B, Consider for Approval OSBA's Resolution to Amend the 2018 By-Laws. Director McDonald made a motion to approve, Director Sybrant seconded, passed unanimously.
- C. Action Item C, Consider for Approval OSBA's Resolution to Create an Oregon Rural School Board Member Caucus. Director Orcutt made a motion to approve, Director Sybrant seconded, passed unanimously.
- D. Action Item D, Consider for Approval Dr. Tom Chanez for OSBA legislative Policy Committee. Director McDonald made a motion to Approve, Director Frasier seconded, passed unanimously.
- E. Action Item E, Consider for Approval NFHS Network School Broadcast Program. Director Orcutt made a motion to approve, Director Sybrant seconded. After discussion, the board voted unanimously to not approve this item at this time, but would reconsider in the future with additional information.

IX. ANNOUNCEMENTS

- A. Future dates of importance
 - Facilities walk through, December 12 2023, at 5:00 PM
 - Next Board meeting, January 18, 2024

X. OTHER BUSINESS.

- A. None.

XI. ADJOURN. Director Frasier made a motion to adjourn at 7:09 PM, Director Orcutt seconded, passed unanimously. The meeting was adjourned at 7:10 PM.

**Yoncalla School District
BOARD OF DIRECTORS
REGULAR MEETING MINUTES
December 13, 2023
401 1st Street
Early Learning Center
Yoncalla, OR 97499**

BOARD MEMBERS PRESENT

Cathey Grimes, Chair
Della Orcutt, Board Chair
Fawn Sybrant
Lisa Frasier
Twila McDonald- Absent

ADMINISTRATION PRESENT

Brian Berry Laurie Simlerness
Erin Helgren
Megan Barber

5:20 PM CALL TO ORDER. Chair Grimes called the meeting to order at 5:20 PM.

VIII. ACTION ITEMS.

Action Item A. Consider for Approval Student Investment Account Grant Agreement 34522, for the amount of \$371,292.93. Director Frasier made a motion to approve, Director Sybrant seconded. Director Frasier asked for some additional explanation regarding the agreement, which was supplied by Superintendent Berry. The motion was approved unanimously.

XI. ADJOURN. Director Orcutt made a motion to adjourn at 7:10 PM, Director Sybrant seconded, passed unanimously. The meeting was adjourned at 5:40 PM.

Following the meeting the board, Superintendent Berry, Erin Helgren and Megan Barber toured the high school and elementary school buildings.

Yoncalla School District
Financial Overview
Actuals As of December 31, 2023

GENERAL FUND						
Revenue	2022-23	2023-2024	2023-2024		Estimated Totals	Over (Under)
	Actuals	Adopted Budget	YTD Actuals	Encumbrances		Budget
Local Revenue:						
1111-Current Taxes	\$ 1,115,791	\$ 1,105,549	\$ 1,001,445	\$ 104,104	\$ 1,105,549	\$ -
1112-Prior Years' Taxes	\$ 34,555	\$ 55,000	\$ 16,672	\$ 38,328	\$ 55,000	\$ -
1113-County Tax Sales	\$ 3,406		\$ -	\$ -	\$ -	\$ -
1510-Interest on Investments	\$ 70,597	\$ 25,000	\$ 45,031	\$ (20,031)	\$ 25,000	\$ -
1740-Co-Curricular Fees	\$ 5,098	\$ 8,000	\$ 5,544	\$ 2,456	\$ 8,000	\$ -
1990-Miscellaneous Income	\$ 133,419	\$ 80,000	\$ 33,271	\$ 46,729	\$ 80,000	\$ -
2101-County School Fund	\$ 4,759	\$ 3,500	\$ -	\$ 3,500	\$ 3,500	\$ -
2102-General ESD Funds	\$ 40,448	\$ 40,000	\$ 13,898	\$ 26,102	\$ 40,000	\$ -
2199- Other immediate resources	\$ 1,064	\$ 2,000	\$ 734	\$ 1,266	\$ 2,000	\$ -
State Revenue:						
3101-School Support Fund	\$ 3,249,236	\$ 3,257,919	\$ 1,986,878	\$ 1,419,976	\$ 3,406,854	\$ 148,935
3103-Common School Fund	\$ 29,806	\$ 32,650	\$ 15,704	\$ 16,946	\$ 32,650	\$ -
3199-Other Restricted Grants			\$ -	\$ -	\$ -	\$ -
Federal Revenue						
4801-Federal Forest Fees	\$ 26,846	\$ 10,000	\$ -	\$ 10,000	\$ 10,000	\$ -
5300- Sale Comp Fixed Assets			\$ -	\$ -	\$ -	\$ -
Total Revenue	\$ 4,715,023	\$ 4,619,618	\$ 3,119,177	\$ 1,649,376	\$ 4,768,553	\$ 148,935
Total Expenditures (Below)	\$ 4,945,664	\$ 5,774,618	\$ 2,002,660	\$ 3,035,536	\$ 5,038,196	\$ (736,422)
Revenue Over (Under) Expenditures	\$ (230,641)	\$ (1,155,000)	\$ 1,116,517	\$ (1,386,160)	\$ (269,643)	\$ 885,357
Beginning Fund Balance	\$ 1,803,983	\$ 1,600,000	\$ 1,565,939	\$ -	\$ 1,565,939	\$ (34,061)
Ending Fund Balance	\$ 1,573,342	\$ 445,000	\$ 2,682,456	\$ (1,386,160)	\$ 1,296,296	\$ 851,296
Expenditures By Function:						
Instruction	\$ 2,325,590	\$ 2,547,200	\$ 997,479	\$ 1,204,625	\$ 2,202,104	\$ (345,096)
Support Services	\$ 1,920,074	\$ 2,300,118	\$ 1,005,182	\$ 903,611	\$ 1,908,792	\$ (391,326)
Enterprise & Community Service	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Transfers	\$ 700,000	\$ 482,300	\$ -	\$ 482,300	\$ 482,300	\$ -
Contingency	\$ -	\$ 445,000	\$ -	\$ 445,000	\$ 445,000	\$ -
Totals by Function	\$ 4,945,664	\$ 5,774,618	\$ 2,002,660	\$ 3,035,536	\$ 5,038,196	\$ (736,422)

Yoncalla School District

General Fund - Fund 100

FY 23/24 Cash Flow Projection

Actuals Through: December 31, 2023		Actuals Jul	Actuals Aug	Actuals Sep	Actuals Oct	Actuals Nov	Actuals Dec	BUDGET ORIGINAL	YTD Actual	Actuals % of Budget	YTD Encumbrances	YTD Actual + Encumbrance	Actual + Enc % of Budget
REVENUE													
1111	CURRENT YEAR'S TAXES	\$ 4,417	\$ 1,610	\$ 2,457	\$ 1,389	\$ 602,898	\$ 388,674	\$ 1,105,549	\$ 1,001,445	91%	\$ 104,104	\$ 1,105,549	100%
1112	PRIOR YEAR'S TAXES	\$ 3,308	\$ 2,087	\$ 2,613	\$ 1,697	\$ 4,218	\$ 2,748	\$ 55,000	\$ 16,672	30%	\$ 38,328	\$ 55,000	100%
1113	COUNTY TAX SALES	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
1510	INTERST ON INVESTMENTS	\$ 6,279	\$ 8,151	\$ 8,564	\$ 6,858	\$ 6,954	\$ 8,223	\$ 25,000	\$ 45,031	180%	\$ (20,031)	\$ 25,000	100%
1740	CO-CURRICULAR FEES	\$ -	\$ -	\$ 1,850	\$ 840	\$ -	\$ 2,854	\$ 8,000	\$ 5,544	69%	\$ 2,456	\$ 8,000	100%
1960	RECOVERY OF EXPENSES	\$ -	\$ -	\$ -	\$ 3,921	\$ -	\$ -	\$ -	\$ 3,921				
1990	MISCELLANEOUS	\$ 10,074	\$ 4,550	\$ 3,477	\$ 10,372	\$ 4,799	\$ -	\$ 80,000	\$ 33,271	42%	\$ 46,729	\$ 80,000	100%
2101	COUNTY SCHOOL FUND	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,500	\$ -	0%	\$ 3,500	\$ 3,500	100%
2102	GENERAL ESD FUNDS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 13,898	\$ 40,000	\$ 13,898	35%	\$ 26,102	\$ 40,000	100%
2199	OTHER IMMEDIATE RESOURCES	\$ -	\$ 293	\$ -	\$ -	\$ 441	\$ -	\$ 2,000	\$ 734	37%	\$ 1,266	\$ 2,000	100%
3101	SSF - GENERAL SUPPORT	\$ 567,923	\$ 283,791	\$ 283,791	\$ 283,791	\$ 283,791	\$ 283,791	\$ 3,257,919	\$ 1,986,878	61%	\$ 1,419,976	\$ 3,406,854	105%
3103	COMMON SCHOOL FUND	\$ 15,704	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 32,650	\$ 15,704	48%	\$ 16,946	\$ 32,650	100%
3199	RESTRICTED GRANTS-IN-AID	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
4801	FEDERAL FOREST FEES	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 10,000	\$ -	0%	\$ 10,000	\$ 10,000	100%
5300	SALE/COMP FIXED ASSETS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
5400	BEGINNING FUND BAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,565,939	\$ 1,600,000	\$ 1,565,939	98%	\$ -	\$ 1,565,939	98%
Total Monthly Revenue:		\$607,705	\$300,483	\$302,752	\$308,869	\$903,101	\$2,266,127	\$6,219,618	\$ 4,689,037	75%	\$ 1,649,376	\$ 6,334,492	102%
EXPENDITURES BY FUNCTION													
1000	INSTRUCTION	\$ 2,169	\$ 171,719	\$ 196,605	\$ 210,558	\$ 224,754	\$ 191,674	\$ 2,547,200	\$ 997,479	39%	\$ 1,204,625	\$ 2,202,104	86%
2000	SUPPORT SERVICES	\$ 163,595	\$ 148,186	\$ 171,819	\$ 158,086	\$ 217,054	\$ 146,442	\$ 2,300,118	\$ 1,005,182	44%	\$ 903,611	\$ 1,908,792	83%
3000	Enterprise & Community Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
5000	TRANSFERS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 482,300	\$ -	0%	\$ 482,300	\$ 482,300	100%
6000	CONTINGENCIES	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 445,000	\$ -	0%	\$ 445,000	\$ 445,000	100%
7000	UNAPPROP ENDING BAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 445,000	\$ -	0%	\$ -	\$ -	0%
Total Monthly Expenditures:		\$ 165,764	\$ 319,905	\$ 368,424	\$ 368,644	\$ 441,808	\$ 338,115	\$ 6,219,618	\$ 2,002,660	32%	\$ 3,035,536	\$ 5,038,196	81%
Ending Balance:		\$ 441,941	\$ (19,422)	\$ (65,672)	\$ (59,775)	\$ 461,293	\$ 1,928,012	\$ -	\$ 2,686,377		\$ (1,386,160)		
											End Fund Balance:	\$1,296,296	21%

6

ACTUALS	
Monthly Operating Costs:	333,777
\$ of Months to Operate:	3.88

ACTUALS & ENCUMBRANCES	
Monthly Operating Costs:	419,850
\$ of Months to Operate:	3

Over (Under) Budget

\$ -
\$ -
\$ -
\$ -
\$ -
\$ -
\$ -
\$ -
\$ -
\$ -
\$ 148,935
\$ -
\$ -
\$ -
\$ -
\$ (34,061)
\$ 114,874

\$ (345,096)
\$ (391,326)
\$ -
\$ -
\$ -
\$ (445,000)
\$ (1,181,422)

Yoncalla School District #32

*** BOARD REPORT EOM-Revenues ***

From Date: 12/1/2023

To Date: 12/31/2023

Fiscal Year: 2023-2024

- Subtotal by Collapse Mask
 Include pre encumbrance
 Print accounts with zero balance
 Filter Encumbrance Detail by Date Range
 Exclude Inactive Accounts with zero balance

Account Number	Description	GL Budget	Range To Date	YTD	Balance	Encumbrance	Budget Balance	% Bud
100.0000.1111.000.000.000.00	CURRENT YEAR TAXES	(\$1,105,549.00)	(\$388,673.82)	(\$1,001,444.74)	(\$104,104.26)	\$0.00	(\$104,104.26)	9.42%
100.0000.1112.000.000.000.00	PRIOR YEARS' TAXES	(\$55,000.00)	(\$2,748.38)	(\$16,672.24)	(\$38,327.76)	\$0.00	(\$38,327.76)	69.69%
100.0000.1510.000.000.000.00	EARNINGS ON INVESTMENTS	(\$25,000.00)	(\$8,222.85)	(\$45,030.58)	\$20,030.58	\$0.00	\$20,030.58	-80.12%
100.0000.1740.000.000.000.00	CO-CURRICULAR FEES	(\$8,000.00)	(\$2,854.00)	(\$5,544.00)	(\$2,456.00)	\$0.00	(\$2,456.00)	30.70%
100.0000.1960.000.000.000.00	RECOVERY OF EXPENDITURE	\$0.00	\$0.00	(\$3,921.00)	\$3,921.00	\$0.00	\$3,921.00	0.00%
100.0000.1990.000.000.000.00	MISC. LOCAL SOURCES	(\$80,000.00)	\$0.00	(\$33,271.23)	(\$46,728.77)	\$0.00	(\$46,728.77)	58.41%
100.0000.2101.000.000.000.00	COUNTY SCHOOL FUND	(\$3,500.00)	\$0.00	\$0.00	(\$3,500.00)	\$0.00	(\$3,500.00)	100.00%
100.0000.2102.000.000.000.00	GENERAL ESD FUNDS	(\$40,000.00)	(\$13,898.00)	(\$13,898.00)	(\$26,102.00)	\$0.00	(\$26,102.00)	65.26%
100.0000.2199.000.000.000.00	OTHER INTERMEDIATE SOURCES	(\$2,000.00)	\$0.00	(\$734.41)	(\$1,265.59)	\$0.00	(\$1,265.59)	63.28%
100.0000.3101.000.000.000.00	SCHOOL SUPPORT FUND	(\$3,257,919.00)	(\$283,791.00)	(\$1,986,878.00)	(\$1,271,041.00)	\$0.00	(\$1,271,041.00)	39.01%
100.0000.3103.000.000.000.00	COMMON SCHOOL FUND	(\$32,650.00)	\$0.00	(\$15,704.08)	(\$16,945.92)	\$0.00	(\$16,945.92)	51.90%
100.0000.4801.000.000.000.00	FEDERAL FOREST FEES	(\$10,000.00)	\$0.00	\$0.00	(\$10,000.00)	\$0.00	(\$10,000.00)	100.00%
100.0000.5400.000.000.000.00	BEGINNING FUND BALANCE-GENERA FUND: GENERAL FUND - 100	(\$1,600,000.00) (\$6,219,618.00)	\$0.00 (\$700,188.05)	(\$1,565,939.36) (\$4,689,037.64)	(\$34,060.64) (\$1,530,580.36)	\$0.00	(\$34,060.64) (\$1,530,580.36)	2.13% 24.61%
201.0000.4501.000.000.000.00	ESSER REVENUE	(\$370,000.00)	\$0.00	(\$302,003.29)	(\$67,996.71)	\$0.00	(\$67,996.71)	18.38%
201.0000.4510.000.000.000.00	ESSA	(\$96,804.23)	(\$20,740.13)	(\$22,763.95)	(\$74,040.28)	\$0.00	(\$74,040.28)	76.48%
201.0000.5400.000.000.000.00	ESSER - BEGINNING FUND BALANCE FUND: FEDERAL GRANTS - 201	\$0.00 (\$466,804.23)	\$0.00 (\$20,740.13)	\$116,198.03 (\$208,569.21)	(\$116,198.03) (\$258,235.02)	\$0.00	(\$116,198.03) (\$258,235.02)	0.00% 55.32%
202.0000.1510.000.000.000.00	INTEREST ON INVESMENTS	(\$1,000.00)	(\$90.85)	(\$512.36)	(\$487.64)	\$0.00	(\$487.64)	48.76%
202.0000.5200.000.000.000.00	TRANSFER FROM GENERAL FUND	(\$432,300.00)	\$0.00	\$0.00	(\$432,300.00)	\$0.00	(\$432,300.00)	100.00%
202.0000.5400.000.000.000.00	BEGINNING FUND BALANCE-BLDG IM FUND: BLDG IMP/REPR - 202	(\$599,000.00) (\$1,032,300.00)	\$0.00 (\$90.85)	(\$615,870.90) (\$616,383.26)	\$16,870.90 (\$415,916.74)	\$0.00	\$16,870.90 (\$415,916.74)	-2.82% 40.29%
208.0000.1510.000.000.000.00	INTEREST ON INVESMENTS	\$0.00	(\$161.64)	(\$911.64)	\$911.64	\$0.00	\$911.64	0.00%
208.0000.5400.000.000.000.00	BEGINNING FUND BALANCE-UNEMPLC FUND: UNEMPLOYMENT RESERVE - 208	(\$63,757.10) (\$63,757.10)	\$0.00 (\$161.64)	(\$64,164.02) (\$65,075.66)	\$406.92 \$1,318.56	\$0.00	\$406.92 \$1,318.56	-0.64% -2.07%
209.0000.1510.000.000.000.00	INTEREST ON INVESMENTS	(\$1,000.00)	(\$610.36)	(\$3,442.44)	\$2,442.44	\$0.00	\$2,442.44	-244.24%
209.0000.1970.000.000.000.00	PERS RESERVE	(\$25,450.00)	(\$1,892.09)	(\$10,081.82)	(\$15,368.18)	\$0.00	(\$15,368.18)	60.39%
209.0000.5400.000.000.000.00	BEGINNING FUND BALANCE FUND: PERS RESERVE - 209	(\$209,000.00) (\$235,450.00)	\$0.00 (\$2,502.45)	(\$212,235.31) (\$225,759.57)	\$3,235.31 (\$9,690.43)	\$0.00	\$3,235.31 (\$9,690.43)	-1.55% 4.12%
210.0000.1760.000.000.000.00	CLUB FUNDRAISING	(\$100,000.00)	\$0.00	\$0.00	(\$100,000.00)	\$0.00	(\$100,000.00)	100.00%
210.0000.5400.000.000.000.00	BEGINNING FUND BALANCE-STUDENT FUND: STUDENT BODY - 210	(\$40,000.00) (\$140,000.00)	\$0.00 \$0.00	(\$46,225.16) (\$46,225.16)	\$6,225.16 (\$93,774.84)	\$0.00	\$6,225.16 (\$93,774.84)	-15.56% 66.98%
211.0000.5200.000.000.000.00	INTERFUND TRANSFER	(\$35,000.00)	\$0.00	\$0.00	(\$35,000.00)	\$0.00	(\$35,000.00)	100.00%
211.0000.5400.000.000.000.00	BEGINNING FUND BALANCE-TECHNOI FUND: TECHNOLOGY FUND - 211	(\$30,000.00) (\$65,000.00)	\$0.00 \$0.00	(\$32,687.06) (\$32,687.06)	\$2,687.06 (\$32,312.94)	\$0.00	\$2,687.06 (\$32,312.94)	-8.96% 49.71%
250.0000.3299.000.000.000.00	OTHER RESTRICTED GRANTS-IN-AID FUND: STATE GRANTS - 250	(\$102,649.02) (\$102,649.02)	\$0.00 \$0.00	\$0.00 \$0.00	(\$102,649.02) (\$102,649.02)	\$0.00	(\$102,649.02) (\$102,649.02)	100.00% 100.00%
251.0000.3299.000.000.000.00	OTHER RESTRICT GRANTS - SIA	(\$288,312.07)	(\$185,546.47)	(\$185,546.47)	(\$102,765.60)	\$0.00	(\$102,765.60)	35.64%
251.0000.5400.000.000.000.00	BEGINNING FUND BALANCE FUND: STUDENT INVESTMENT ACCOUNT - 251	\$0.00 (\$288,312.07)	\$0.00 (\$185,546.47)	(\$154,791.98) (\$340,338.45)	\$154,791.98 \$52,026.38	\$0.00	\$154,791.98 \$52,026.38	0.00% -18.05%
252.0000.3299.000.000.000.00	OTHER RESTRICTED GRANTS-IN-AID FUND: HIGH SCHOOL SUCCESS - M98 - 252	(\$131,944.54) (\$131,944.54)	\$0.00 \$0.00	\$0.00 \$0.00	(\$131,944.54) (\$131,944.54)	\$0.00	(\$131,944.54) (\$131,944.54)	100.00% 100.00%

Yoncalla School District #32

*** BOARD REPORT EOM-Revenues ***

Fiscal Year: 2023-2024

From Date: 12/1/2023 To Date: 12/31/2023

Subtotal by Collapse Mask
 Include pre encumbrance
 Print accounts with zero balance
 Filter Encumbrance Detail by Date Range
 Exclude Inactive Accounts with zero balance

Account Number	Description	GL Budget	Range To Date	YTD	Balance	Encumbrance	Budget Balance	% Bud
280.0000.3299.000.000.000.00	PROMISE PRESCHOOL GRANT	(\$354,564.00)	\$0.00	(\$201,636.90)	(\$152,927.10)	\$0.00	(\$152,927.10)	43.13%
280.0000.5400.000.000.000.00	BEGINNING FUND BALANCE	\$0.00	\$0.00	\$196,489.04	(\$196,489.04)	\$0.00	(\$196,489.04)	0.00%
	FUND: PROMISE PRESCHOOL - 280	(\$354,564.00)	\$0.00	(\$5,147.86)	(\$349,416.14)	\$0.00	(\$349,416.14)	98.55%
281.0000.3299.000.000.000.00	OTHER RESTRICTED GRANTS-IN-AID	\$0.00	\$0.00	(\$11,709.79)	\$11,709.79	\$0.00	\$11,709.79	0.00%
281.0000.4510.000.000.000.00	ESSA	\$0.00	\$0.00	(\$18,182.05)	\$18,182.05	\$0.00	\$18,182.05	0.00%
281.0000.5400.000.000.000.00	BEGINNING FUND BALANCE-SPECIAL	(\$30,546.00)	\$0.00	(\$56,944.17)	\$26,398.17	\$0.00	\$26,398.17	-86.42%
	FUND: SPECIAL PROJECTS - 281	(\$30,546.00)	\$0.00	(\$86,836.01)	\$56,290.01	\$0.00	\$56,290.01	-184.28%
286.0000.4590.000.000.000.00	FED VIA ST-TITLE I (A)	(\$228,557.00)	\$0.00	(\$93,175.80)	(\$135,381.20)	\$0.00	(\$135,381.20)	59.23%
286.0000.5400.000.000.000.00	BEGINNING FUND BALANCE	\$0.00	\$0.00	\$47,654.13	(\$47,654.13)	\$0.00	(\$47,654.13)	0.00%
	FUND: TITLE I (A) - 286	(\$228,557.00)	\$0.00	(\$45,521.67)	(\$183,035.33)	\$0.00	(\$183,035.33)	80.08%
289.0000.4590.000.000.000.00	FED REV VIA STATE	(\$32,000.00)	\$0.00	(\$5,716.66)	(\$26,283.34)	\$0.00	(\$26,283.34)	82.14%
289.0000.5400.000.000.000.00	BEGINNING FUND BALANCE	\$0.00	\$0.00	\$5,716.66	(\$5,716.66)	\$0.00	(\$5,716.66)	0.00%
	FUND: REAP/SRSA - 289	(\$32,000.00)	\$0.00	\$0.00	(\$32,000.00)	\$0.00	(\$32,000.00)	100.00%
290.0000.4506.000.000.000.00	PERKINS II VOCATIONAL GRANT	(\$4,500.00)	\$0.00	\$0.00	(\$4,500.00)	\$0.00	(\$4,500.00)	100.00%
	FUND: PERKINS GRANT - 290	(\$4,500.00)	\$0.00	\$0.00	(\$4,500.00)	\$0.00	(\$4,500.00)	100.00%
295.0000.1920.000.000.000.00	MISC GRANT - COW CREEK	(\$204,062.20)	\$0.00	(\$8,000.00)	(\$196,062.20)	\$0.00	(\$196,062.20)	96.08%
295.0000.5400.000.000.000.00	BEGINNING FUND BALANCE	(\$18,231.00)	\$0.00	(\$90,419.64)	\$72,188.64	\$0.00	\$72,188.64	-395.97%
	FUND: Misc Grants - 295	(\$222,293.20)	\$0.00	(\$98,419.64)	(\$123,873.56)	\$0.00	(\$123,873.56)	55.73%
296.0000.4590.000.000.000.00	FED REV VIA STATE	(\$53,834.96)	\$0.00	(\$21,714.35)	(\$32,120.61)	\$0.00	(\$32,120.61)	59.66%
296.0000.5400.000.000.000.00	BEGINNING FUND BALANCE	\$0.00	\$0.00	\$14,514.24	(\$14,514.24)	\$0.00	(\$14,514.24)	0.00%
	FUND: IDEA - 296	(\$53,834.96)	\$0.00	(\$7,200.11)	(\$46,634.85)	\$0.00	(\$46,634.85)	86.63%
297.0000.4590.000.000.000.00	TITLE II REVENUE	(\$47,173.00)	\$0.00	(\$36,464.50)	(\$10,708.50)	\$0.00	(\$10,708.50)	22.70%
297.0000.5400.000.000.000.00	BEGINNING FUND BALANCE	\$0.00	\$0.00	(\$2,452.07)	\$2,452.07	\$0.00	\$2,452.07	0.00%
	FUND: TITLE II (A) & TITLE IV (A) - 297	(\$47,173.00)	\$0.00	(\$38,916.57)	(\$8,256.43)	\$0.00	(\$8,256.43)	17.50%
298.0000.4300.000.000.000.00	INDIAN EDUCATION GRANT	(\$22,097.16)	\$0.00	(\$15,265.85)	(\$6,831.31)	\$0.00	(\$6,831.31)	30.91%
298.0000.5400.000.000.000.00	BEGINNING FUND BALANCE-INDIAN	\$0.00	\$0.00	\$15,265.85	(\$15,265.85)	\$0.00	(\$15,265.85)	0.00%
	FUND: INDIAN EDUCATION GRANT - 298	(\$22,097.16)	\$0.00	\$0.00	(\$22,097.16)	\$0.00	(\$22,097.16)	100.00%
299.0000.1610.000.000.000.00	DAILY SALES - LUNCH	(\$1,000.00)	\$0.00	(\$302.50)	(\$697.50)	\$0.00	(\$697.50)	69.75%
299.0000.1611.000.000.000.00	DAILY SALES - BREAKFAST	(\$1,000.00)	\$0.00	\$0.00	(\$1,000.00)	\$0.00	(\$1,000.00)	100.00%
299.0000.3102.000.000.000.00	SCHOOL SUPPORT LUNCH MATCH	(\$900.00)	\$0.00	\$0.00	(\$900.00)	\$0.00	(\$900.00)	100.00%
299.0000.3299.000.000.000.00	NATL SCHOOL LUNCH REIMB	\$0.00	(\$1,852.97)	(\$6,783.33)	\$6,783.33	\$0.00	\$6,783.33	0.00%
299.0000.4504.000.000.000.00	NATL SCHOOL BREAKFAST REIMB	(\$80,000.00)	(\$8,777.32)	(\$19,029.30)	(\$60,970.70)	\$0.00	(\$60,970.70)	76.21%
299.0000.4505.000.000.000.00	NATL SCHOOL LUNCH REIMB	(\$120,000.00)	(\$20,712.50)	(\$51,929.21)	(\$68,070.79)	\$0.00	(\$68,070.79)	56.73%
299.0000.4910.000.000.000.00	USDA COMMODITIES	(\$5,000.00)	\$0.00	\$0.00	(\$5,000.00)	\$0.00	(\$5,000.00)	100.00%
299.0000.5200.000.000.000.00	INTERFUND TRANSFER	(\$15,000.00)	\$0.00	\$0.00	(\$15,000.00)	\$0.00	(\$15,000.00)	100.00%
299.0000.5400.000.000.000.00	BEGINNING FUND BALANCE - FOOD	\$0.00	\$0.00	(\$63,259.82)	\$63,259.82	\$0.00	\$63,259.82	0.00%
	FUND: FOOD SERVICE - 299	(\$222,900.00)	(\$31,342.79)	(\$141,304.16)	(\$81,595.84)	\$0.00	(\$81,595.84)	36.61%
410.0000.1510.000.000.000.00	INTEREST ON INVESTMENTS	\$0.00	\$0.00	(\$0.02)	\$0.02	\$0.00	\$0.02	0.00%
410.0000.1920.000.000.000.00	CONTRIBUTIONS/PRIVATE	(\$1,800,000.00)	\$0.00	(\$300.01)	(\$1,799,699.99)	\$0.00	(\$1,799,699.99)	99.98%
410.0000.5200.000.000.000.00	INTERFUND TRANSFER	(\$41,462.00)	\$0.00	\$0.00	(\$41,462.00)	\$0.00	(\$41,462.00)	100.00%

Yoncalla School District #32

*** BOARD REPORT EOM-Revenues ***

From Date: 12/1/2023

To Date: 12/31/2023

Fiscal Year: 2023-2024

- Subtotal by Collapse Mask
 Include pre encumbrance
 Print accounts with zero balance
 Filter Encumbrance Detail by Date Range
 Exclude Inactive Accounts with zero balance

Account Number	Description	GL Budget	Range To Date	YTD	Balance	Encumbrance	Budget Balance	% Bud
	FUND: CAPITAL PROJECTS - 410	(\$1,841,462.00)	\$0.00	(\$300.03)	(\$1,841,161.97)	\$0.00	(\$1,841,161.97)	99.98%
700.0000.1510.000.000.000.00	INTEREST ON INVESMENTS	(\$150.00)	(\$38.07)	(\$214.73)	\$64.73	\$0.00	\$64.73	-43.15%
700.0000.1920.000.000.000.00	CONTRIBUTIONS & DONATIONS	(\$2,500.00)	\$0.00	(\$2,166.00)	(\$334.00)	\$0.00	(\$334.00)	13.36%
700.0000.5400.000.000.000.00	BEGINNING FUND BALANCE-SCHOLAF	(\$21,700.00)	\$0.00	(\$28,769.58)	\$7,069.58	\$0.00	\$7,069.58	-32.58%
	FUND: SCHOLARSHIP - 700	(\$24,350.00)	(\$38.07)	(\$31,150.31)	\$6,800.31	\$0.00	\$6,800.31	-27.93%
Grand Total:		(\$11,830,112.28)	(\$940,610.45)	(\$6,678,872.37)	(\$5,151,239.91)	\$0.00	(\$5,151,239.91)	43.54%

End of Report

Yoncalla School District #32

*** BOARD REPORT APPROPRIATIONS ***

From Date: 12/1/2023

To Date: 12/31/2023

Fiscal Year: 2023-2024

Subtotal by Collapse Mask

Include pre encumbrance

Print accounts with zero balance

Filter Encumbrance Detail by Date Range

Exclude Inactive Accounts with zero balance

Account Number	Description	GL Budget	Range To Date	YTD	Balance	Encumbrance	Budget Balance	% Bud
100.0000.0000.000.000.000.00	UNDESIGNATED	(\$6,219,618.00)	(\$338,115.43)	(\$2,002,660.01)	(\$4,216,957.99)	\$0.00	(\$4,216,957.99)	67.80%
100.1000.0000.000.000.000.00	UNDESIGNATED	\$2,547,199.65	\$191,673.69	\$997,478.61	\$1,549,721.04	\$1,204,625.29	\$345,095.75	13.55%
100.2000.0000.000.000.000.00	UNDESIGNATED	\$2,300,118.35	\$146,441.74	\$1,005,181.40	\$1,294,936.95	\$903,610.63	\$391,326.32	17.01%
100.5000.0000.000.000.000.00	UNDESIGNATED	\$482,300.00	\$0.00	\$0.00	\$482,300.00	\$0.00	\$482,300.00	100.00%
100.6000.0000.000.000.000.00	UNDESIGNATED	\$445,000.00	\$0.00	\$0.00	\$445,000.00	\$0.00	\$445,000.00	100.00%
100.7000.0000.000.000.000.00	UNDESIGNATED	\$445,000.00	\$0.00	\$0.00	\$445,000.00	\$0.00	\$445,000.00	100.00%
	FUND: GENERAL FUND - 100	\$0.00	\$0.00	\$0.00	\$0.00	\$2,108,235.92	(\$2,108,235.92)	0.00%
Grand Total:		\$0.00	\$0.00	\$0.00	\$0.00	\$2,108,235.92	(\$2,108,235.92)	0.00%

End of Report



Superintendent and/or School Board
Yoncalla SD 32
PO Box 568,
Yoncalla, Oregon 97499

OASTL
12875 Kings Valley Highway
Monmouth, OR 97361
drdavesullivan@gmail.com
541-791-6470
December 20, 2023

Dear Superintendent and/or School Board:

This letter asks your School District to join in a legal action that – if successful – would require better funding for Oregon’s schools.

My name is David Sullivan, and I am a retired professor emeritus of the OSU College of Business. I am also a co-founder of Oregon Advocates for School Trusts Lands (OASTL), a chapter of the national Advocates for School Trust Lands (ASTL). Our organization has an informative website at www.OASTL.org that describes our mission and has a link to an 11-minute video explaining the legal obligations for managing our nation’s school trust lands.

Along with several Oregon parents and schoolchildren, ASTL and OASTL filed a lawsuit in Coos County to improve school funding. Oregon has constitutional protections for funding quality public schools and for managing Common School Lands on behalf of schools. However, Oregon’s politicians have been diverting money from the Common School Fund to non-school uses, ignoring these protections. I am confident our lawsuit will correct this, but I am not a lawyer so do not take my opinions as legal advice.

The State Attorney General filed a response to our lawsuit that says: “Because (at least) schools and school districts have not joined this suit, this Court lacks jurisdiction to issue the relief requested by the Plaintiffs.” For this reason, OASTL decided to reach out to school districts directly about joining the lawsuit.

We have an attorney, Natalie C. Scott, Oregon State Bar #024510, and your school district is welcome to have her represent all of us – **including your school district** – at our expense. If your district chooses this path by completing the attached engagement form prepared by Eugene-based Scott Law Group LLP (www.scott-law-group.com), then all court and attorney costs will be borne by OASTL, and Ms. Scott will file the appropriate paperwork to ask the court to add your school district as a co-Plaintiff. Please join us in this effort to ensure better funding for Oregon’s schools.

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IN THE CIRCUIT COURT OF THE STATE OF OREGON
FOR COOS COUNTY

23CV39056

ADVOCATES FOR SCHOOL TRUST LANDS;
OREGON ADVOCATES FOR SCHOOL
TRUST LANDS; APRIL DIVINEY, individually
and as guardian ad litem for BRADLEY
REITER, a minor; and ROBIN RAMSEY,
individually and as guardian ad litem for
CONNOR RAMSEY, a minor.

Case No. _____

COMPLAINT (Declaratory Relief,
Injunctive Relief, and Attorney
Fees)

CLAIM ***NOT*** SUBJECT TO
MANDATORY ARBITRATION

Plaintiffs,

v.

Filing Fee Established by
ORS 21.135 (2)(a), (f)

STATE of OREGON, STATE LAND BOARD,
DEPARTMENT OF STATE LANDS, BOARD
OF FORESTRY, ROB WAGNER as senate
president, DAN RAYFIELD as house speaker,
and CALVIN MUKUMOTO as state forester.

Defendants.

Plaintiffs allege:

1.

Despite the guarantees to Oregon’s schoolchildren in Article VIII “Education and School
Lands” of the Oregon Constitution, Oregon’s schools have been and continue to be chronically
and constitutionally underfunded. Oregon’s Common School Lands, established by section 2
of Article VIII, provide an important and independent source of funds for public education.
Oregon politicians and agencies, Defendants herein, have diverted significant value from
Common School Lands to non-school purposes and have failed to adhere to their fiduciary
duties as trustees of those lands for the benefit of Oregon’s schoolchildren.

This image shows the first page of the 40-page initial Complaint that we filed in the Coos
County Circuit Court on September 25, 2023. The entire Complaint along with the Defendants’
court filings can be read at www.oastl.org/legal.

I have attached four documents to help explain everything in more detail:

- The four-page “Who Steals from Children?” article was written by Jim Petersen, Founder and President of non-profit Evergreen Foundation.
- The two-page letter was written by Margaret Bird, co-founder of Advocates for School Trust Lands, a national nonprofit that has a history of winning school trust land lawsuits in other states.
- The three-page history titled “OSU President Stuns Land Board” was written by John C. Charles, president and CEO of the Cascade Policy Institute.
- The three-page "Engagement of The Scott Law Group & Joint Representation Disclosure" form allows your school district to sign up in this lawsuit ***with full legal representation for free***. If this approach makes sense to you, sign and return this engagement form.

Please note that time is of the essence. The Honorable Judge Andrew E. Combs of the Coos County Circuit Court is scheduled to hold a hearing on Monday, January 29th at 1:30 p.m. to consider the Attorney General’s motion to dismiss the lawsuit. OASTL hopes to receive completed engagement forms from school districts by January 15, 2024.

Please review the attached materials and have your legal advisors do the same. If you or your legal advisors have questions, please feel free to contact me or our attorney. We hope you will join our effort to enforce Oregon’s existing laws and protect school funding for future generations of schoolchildren.

Sincerely,

A handwritten signature in black ink that reads "DAVE SULLIVAN". The letters are in all caps and have a casual, slightly slanted appearance.

Dr. Dave Sullivan
(signed electronically)

ADVOCATES FOR



SCHOOL TRUST LANDS

Margaret Bird
Advocates for School Trust Lands
1251 Walden Lane, Draper, Utah 84020
margaretraybird@gmail.com
801-597-6701

December 11, 2023

Dear Oregon School Boards:

Oregon was party to a bilateral compact between two sovereigns when the people accepted the Oregon constitution November 9, 1857, and when Congress set out the conditions of statehood in an Act of Congress admitting Oregon to the union on February 14, 1859. Oregon accepted the school lands as every state before it had, beginning with Ohio in 1803, and agreed to hold the lands in trust for the support of the common schools. At statehood every state entered into a solemn compact in which the grants “were in the nature of a contract, with a bargained-for consideration exchanged between the two governments.”¹ In Oregon’s Admission Act, there is the additional requirement that if the propositions are accepted, they “shall be obligatory on the United States and upon the said State of Oregon...” That means the state’s obligation to the school trust is real and enforceable.

Oregon created the common school fund to be set apart as a “separate and irreducible fund” for schools, built with the proceeds obtained from the sale and leasing of the lands. Since 1803, there have been numerous United States Supreme Court decisions and state supreme court decisions² on school trust land cases in which supreme courts have held that these lands are held in trust, they are for the exclusive benefit of the named beneficiaries, the common schools, and states are held to the highest fiduciary duties.

In 1852 and again in 1980³ the United States Supreme Court set out and reaffirmed three important principles governing school trust lands:

- 1) The enabling acts created trusts like a private charitable trust which the state could not abridge.
- 2) The enabling acts were to be strictly construed according to fiduciary principles.
- 3) The enabling acts preempt state laws or constitutions.

¹ United States v. Cotter Corporation Nos. C79-0037, C 79-0307. United States District Court, D. Utah, C.D. (Oct 1, 1979), p. 1001.

² State supreme courts include Nebraska, Montana, Washington, Utah, Alaska, Arizona, California, Oklahoma, Indiana, South Dakota, Mississippi, Louisiana.

³ Trustees of Vincennes University v. State of Indiana (1852) and Andrus v. Utah (1980).

The United States Supreme Court has also held that “the grants provide the most substantial support possible to the beneficiaries and that only those beneficiaries profit from the trust.”⁴

Since that time, fiduciary duty has been eloquently elucidated by the jurist Benjamin Cardozo in his famous explanation of fiduciary duty⁵:

Many forms of conduct permissible in a workaday world for those acting at arm’s length, are forbidden to those bound by fiduciary ties. A trustee is held to something stricter than the morals of the marketplace. Not honesty alone, but the punctilio of an honor the most sensitive, is then the standard of behavior. As to this there has developed a tradition that is unbending and inveterate. Uncompromising rigidity has been the attitude of courts of equity when petitioned to undermine the rule of undivided loyalty by the “disintegrating erosion” of particular exceptions. Only thus has the level of conduct for fiduciaries been kept at a level higher than that trodden by the crowd. It will not consciously be lowered by any judgment of this court.

Thirty years ago, when school trust lands in Utah were being mismanaged and poorly invested, the school boards, the State Board of Education, the Parent Teacher Association, the Utah Education Association, and the Elementary and Secondary Principals spoke out. They educated the public and the state legislature on school trust lands and undivided loyalty. Their courage has led to a land administration run like a business, now making around \$160 million annually instead of less than the paltry \$5 million when run like a government agency. The permanent fund in Utah has gone from less than \$40 million to over \$3.3 billion. Each school has parents, teachers and the principal who decide on academic programs needed in their school, all funded by the permanent State School Fund. This year schools received over \$100 million dollars. Before the reforms, our schools got less than \$5 million annually.

It pays to speak out for schools!!!! Bigtime!!!!!! The squeaky wheel gets the grease. Call your friends who serve on school boards in Utah. They will all tell you about the School Land Trust Program and what it is doing for Utah’s children and schools.

United local school boards can turn the misuse of school lands around. The courts are clearly on the side of school trust lands being used to support schools, as Congress required. Join Oregon Advocates for School Trust Lands (www.OASTL.org) and become a co-plaintiff on their lawsuit against Oregon and the State Land Board. Surely some local school boards are courageous enough to defend the school lands envisioned by Thomas Jefferson in 1785 to provide support for schools in each state.

Sincerely,

Margaret Bird, co founder of ASTL
(signed electronically)

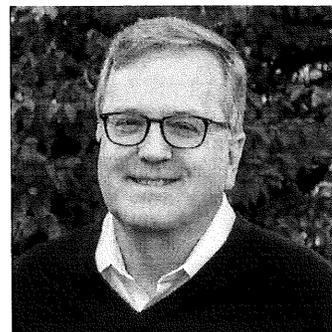
⁴ *Lassen v. Arizona* Unites States Supreme Court No. 84, 87 S. Ct. 584 (1967), p. 589.

⁵ *Meinhard v. Salmon* 164 N. E. 543 (N.Y. 1928).

OSU President Stuns Land Board

by John A. Charles, Jr., President and CEO, Cascade Policy Institute

On November 13, Oregon State University President Jayathi Y. Murthy informed the State Land Board (SLB) that OSU is no longer in a position to participate in management of the proposed Elliott State Research Forest Authority (ESFRA).



The Authority, authorized by the state legislature in 2021, was supposed to be a new state entity that would take ownership of the 84,000-acre Elliott State Forest and convert it to a “world class” forestry research center. Although the Elliott had an estimated market value of \$850 million in 1995, it has been losing money for the past decade due to poor decision-making by the Land Board. No timber has been harvested since 2016. The Land Board has been desperate to divest it, and was planning to wrap up the transfer process at its upcoming meeting on December 12.

In a two-page letter, President Murthy stated:

My conclusion was reached through the consideration of multiple factors, including the recent public opposition to the Habitat Conservation Plan and forest management plan by the Confederated Tribes of Coos, Lower Umpqua and Siuslaw Indians (CTCLUSI).

Although the CTCLUSI had previously shared support for the OSU ESRF Research Proposal, they recently expressed significant concerns regarding the limitations and constraints placed on the management of the overall forest and the acreage dedicated to reserves in the research design.

In addition, from an operational perspective, OSU continues to have significant concerns with the State’s intent to limit variations in annual [timber] harvest volumes in the ESRF, and to move forward with a carbon project on the ESRF.

OSU has been steadfast in its opposition to monetizing the carbon within the ESRF in the early stages for the clear and simple reason that the sale of the forest’s carbon would limit or interfere with the ability of OSU to conduct meaningful research that is critical to addressing important sustainable management questions.

The Elliott was established as Oregon’s first state forest in 1930 and is located in Coos and Douglas counties near Reedsport. The forest was part of a portfolio of lands known as Common School Trust Lands (CSTL), which must be managed for the primary purpose of generating revenue for Oregon public schools. Net income from those lands is transferred into the Common School Fund, where it is invested in stocks, bonds, and other financial instruments.

Oregon began actively managing the Elliott in 1955. For many decades, the ESF was used as expected and generated more than \$700 million dollars for Oregon schools, and provided well-paying jobs for rural Oregon workers. Between 1960 and 1990, an average of 50 million board feet of timber was harvested from the Elliott State Forest each year.

Unfortunately, by the 1980s, radical land preservationists had weaponized the federal Endangered Species Act (ESA) to halt many commercial timber sales across the country,

especially on public lands in the West. This did not bode well for the Elliott, which has large stands of old trees that provide habitat for endangered species such as Spotted Owls and Marbled Murrelets. It was apparent that management costs on the Elliott would rise steadily, while timber harvests would decline.

In response, the Oregon Department of Forestry hired economist John Beuter in 1994 to examine alternative management strategies. Mr. Beuter concluded:

Selling the Elliott is the only marketing alternative likely to significantly increase net annual income to the CSF. The market value for the forest is not likely to be less than \$600 million, and could well be in the neighborhood of a billion dollars.

In 1996 the SLB considered selling the Elliott, along with 600,000 acres of underperforming rangelands in eastern Oregon, but chose not to. Timber revenues on the Elliott continued to drop in subsequent years, and the SLB periodically held work sessions to address the conflicts between timber harvest goals and endangered species protection. The option of selling the forest and putting the net proceeds into the Common School Fund was promoted by Cascade Policy Institute and others, but the Land Board never considered it.

In 2012, an ESA lawsuit reduced harvest levels so much that the Elliott actually lost money. This sent the Board into panic mode. Gov. John Kitzhaber voiced concern that Land Board members faced potential lawsuits from public school districts (CSTL “beneficiaries”) for *breach of fiduciary trust*.

Eventually the Board, including then-Secretary of State Kate Brown, voted unanimously to establish a process for selling the entire forest. However, the Board designed a bizarre “Sale Protocol” in which a purchase price would be determined by real estate valuations, not an auction. The Protocol also included four restrictions on future owners, related to riparian protection, preservation of older trees, public access and hiring levels. This resulted in an artificially low price of \$220.8 million as of December 31, 2016.

Unlike a normal real estate sale, this was the only price the Board would accept. If anyone offered one dollar more, that bid would be deemed “unresponsive.” A certified cash offer for \$220.8 million was received from a consortium led by Lone Rock Timber Management Company and the Cow Creek Band of Umpqua Tribe of Indians. This appeared to be the solution to the Board’s problem.

However, at the February 2017 meeting of the SLB, Gov. Kate Brown changed her mind and decided that her fiduciary obligations to schools could be met by retaining the Elliott in public ownership. But newly-seated Treasurer Tobias Read, stating his fiduciary trust obligations to schools, voted with SOS Dennis Richardson to accept the Lone Rock offer.

For a brief moment in time, bipartisanship and common sense seemed to have prevailed. It was a false summit. Two months later, the State Treasurer reversed himself. He put forward a new option: give the ESF to Oregon State University to create a research forest; “decouple” the Elliott from the Common School Fund so producing income for schools would no longer be required; and replace lost timber revenue to the CSF by some combination of selling bonds and/or appropriating money from the Oregon General Fund.

The Land Board rejected the Lone Rock offer and later established a group of “stakeholders” to figure out how this new Research Forest would work. However, after a lengthy period of due diligence, the OSU Trustees had the courage to do what Land Board members could not: they declined to take possession of the forest. The likelihood of losing money posed too many risks to other university programs.

They did offer to work up a forest research design and send a team of researchers to manage the operation, as long as the University was not responsible for operational losses.

Faced with this unanticipated result, Kate Brown introduced legislation (SB 1546) authorizing the creation of a new state entity, the Elliott State Forest Research Authority (ESFRA), which would own the forest and contract with OSU to do the research. The Governor’s legislative allies dutifully passed SB 1546 in 2021.

Under the new law, the ESFRA would be created after certain conditions had been met, including a financial plan showing that the Authority would not require ongoing subsidies from the legislature. Of course, this was a nonsensical premise. The whole reason the Land Board was trying to fob off the Elliott to the new Authority was because timber harvest levels had been reduced to zero as of 2017, costing the Common School Fund about \$1.5 million annually.

It became clear by July of 2023 that the financial plan was not going to pencil. The proposed Forest Management Plan was going to prevent timber harvest levels from ever paying for the research program.

In an act of desperation, ESFRA advocates even concocted a scheme for selling an intangible commodity known as “carbon credits,” theoretically produced by leaving trees standing. But even if such credits could be sold for short-term profits, the sale would have worsened the longer-term financial problem by preventing any timber harvesting in much of the forest for 50-100 years. This was referenced by the OSU President in her letter.

As it stands now, every day of bureaucratic delay benefits the opponents of timber harvesting. As the trees age, they provide more habitat for endangered species. The preservationists are simply running out the clock.

A day after receiving the letter from President Murthy, Department of State Lands Director Vicki Walker issued a statement that reiterated the Land Board’s commitment to retaining the Elliott as a public forest, but it’s difficult to see a path forward. The Elliott is now a timber museum, where you can look at trees but not touch them.

Regardless, taxpayers will continue to pay off the \$146 million in debt service associated with \$100 million in bonds the state sold in 2019 as a down payment on “decoupling” the ESF from the School Fund (the legislature subsequently appropriated \$121 million to finish the job). Without knowing it, taxpayers bought a state forest that they already owned.

A final note: In recent years, retired OSU professor Dave Sullivan has dedicated his life to reversing the giveaway of the Elliott State Forest. He and his wife Barbara are heading a volunteer group that was formed in 2021 known as Oregon Advocates for School Trust Lands. Working with Springfield lawyer Natalie Scott, OASTL filed a lawsuit in late September. The 40-page complaint is a fascinating document, and quotes from my testimony to the SLB last December. You can learn more at www.oastl.org. While you’re there, consider making a donation. They are doing great work.

WHAT DO YOU WANT FROM YOUR FOREST?

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Who Steals from Children?

In a state as liberal as Oregon, who could have guessed the State Land Board would be caught red-handed stealing from children?

Most living in the state's liberal enclaves in Multnomah and Marion counties didn't pay much attention until Oregon State University President, Jayathi Murthy, declined the Land Board's invitation to participate in further development of the proposed Elliott State Research Forest.

In her two-page letter to the Land Board, President Murthy, an Indian-American mechanical engineer, took the Board's six year smoke-and-mirrors campaign apart as diplomatically as she could – but talk about a smack down!

This comeuppance is richly deserved. Portland Audubon and several other anti-forestry groups have been trying to hijack Oregon's state forests for decades. Congress granted Oregon 3.4 million acres of Public Domain land when it became a state in February of 1859. At that time, Congress was actively promoting capital investments in budding communities and economies across the West.

The history and evolution of Oregon's state forests has been expertly compiled by Bob Zybach, a PhD environmental scientist who worked for years with the late Jerry Phillips, who worked on the Elliott for 37 years, 20 as its manager.

Also on Zybach's trapline, the late Wayne Giesy, who saw Oregon's state-owned forests as economic engines that could support county schools and the state's westside timber industry in perpetuity. The enormous growth that occurred on the Elliott during Phillips' years certainly supported Geisey's belief.

The two graphs below tell the story of timber growth and harvest and how harvest has been impacted through time by wildfires, spotted owl and marbled murrelet listings,

recessions, wind storms, management termination in 2017 and the Land Board’s controversial decision to create an Elliott Research Forest in 2020.

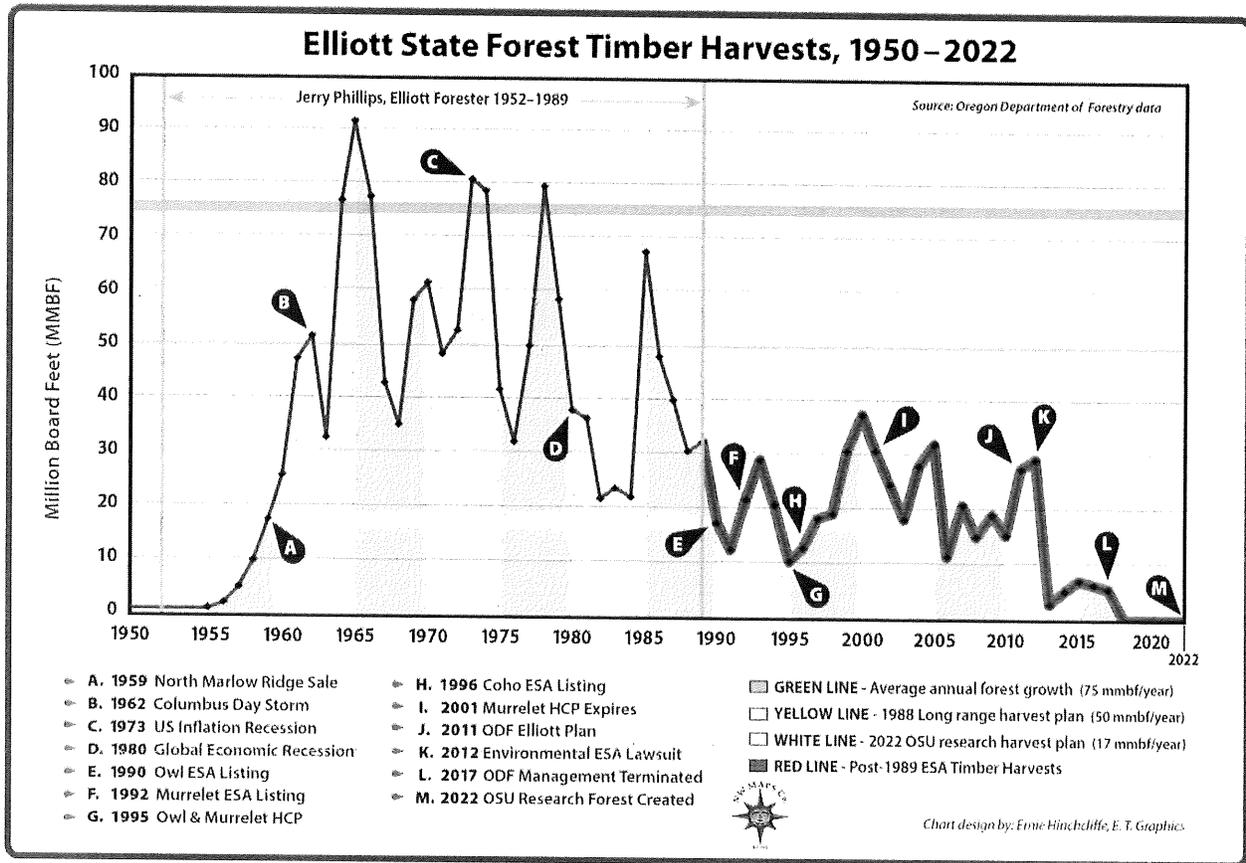


Chart of Elliott State Forest Timber Harvesting History, 1950-2022.

OSU President Murthy quickly saw the economic and environmental damage the Land Board was orchestrating in its effort to transform Oregon’s most productive state-owned forest into what is essentially a no-harvest reserve where it would be impossible to do boots on the ground research involving harvesting, conserving and monitoring different forest management prescriptions, then measuring results against baseline data to quantify positive and negative impacts of harvest on fish and wildlife habitat.

Murthy’s decision to withdraw from participation in the scheme surely shocked Land Board members who had expected OSU Board of Trustees to bless their plan. But she refused given widespread public opposition to their Habitat Conservation Plan and concerns raised by the Confederated Tribes of Coos, Lower Umpqua and Siuslaw Indians who saw Elliott research constraints as being so narrowly drawn that useful research was impossible.

Here is the coup de grace from Murthy’s two-page letter:

“As OSU has already expressed, the notion that research forest managers could maintain a near static timber volume in annual harvest within the research goals and management commitments of the Elliott State Research Forest fails to [1] support the health and resiliency of the forest, [2] recognize the dynamic nature of both forest ecosystems and adaptive management, and [3] support the integrity of a functional, replicated research design as described in the ESRF Research Proposal.”

The litany of events that led to Murthy’s decision began six years ago in a series of disturbing Land Board decisions described to me in a recent email from Dave Sullivan who is a cofounder of Oregon Advocates for School Trust Lands (OASTL), a non-profit that is suing Oregon and the State Land Board. The lawsuit’s goal is to force the State to honor the K-12 trust fund obligations it assumed when the Elliott State Forest was created in 1930.

“Oregon’s Constitution requires School Trust Lands, such as the Elliott, be managed for the benefit of the Common School Fund,” Sullivan wrote. “These lands were to be an endowment for future generations of Oregon School Children. Over the years, the Elliott State Forest generated more than \$700 million for Oregon schools. Now the Land Board wants to terminate the agreement. The record shows they are stealing from children.”

Sullivan is an OSU emeritus business professor, former Corvallis School Board member and Polk County Tree Farmer of the Year in 1991. He writes the State Land Board:

- Fired the Oregon Department of Forestry from managing the Elliott State Forest six years ago in direct violation of ORS 530.490, the statute that outlines the duties and responsibilities of the State Forester.
- Hired their own forester who works out of the Bend office, a 4.5-hour drive from the Elliott.
- Told the new forester not to allow a single log to be harvested from the Elliott, so the forest began losing millions of dollars each year, despite being some of the world’s most productive forestland.
- Paid for an “investment value” appraisal which assumed the vast majority of the trees would be off limits to harvesting. No surprise; this appraisal was roughly one-tenth of the forest’s market value.
- Used this low-ball appraisal to “pay for” selling the Elliott from the Common School Lands for pennies on the dollar. This stole the heritage given to Oregon when it was founded to use for schools and school children.
- Created really restrictive rules about how Oregon State University could be allowed to use the forest for research. Essentially two-thirds of the forest would be

turned into a wildlife preserve, and this would be locked up for 40 to 100 years by selling “carbon credits” and creating ironclad management rules. No substantive changes would be allowed to accommodate changing societal or research needs.

- And then the state Land Board was surprised when OSU decided to back away from this sham “research forest.” Sullivan doubts the State Land Board members seriously considered the possibility OSU would turn down millions of dollars each year in fees along with the prestige of saying they managed the largest research forest in the world. Perhaps even more surprising, OSU’s decision publicly snubbed the same people who provide much of OSU’s general education funding.

“If this list of events were the plot for a movie, a competent director would ask for a rewrite because the plot is unbelievable,” Sullivan wrote. “Who steals money from schoolchildren? The State Land Board? Really?”

Really. The current State Land Board members are Governor Tina Kotek, Secretary of State LaVonne Griffin-Valade and State Treasurer, Tobias Read. However, most of the damage was done during Kate Brown’s eight years as governor, 2015-2023. Read was elected in 2017. Griffin-Valade was appointed by Kotek last June.

The Oregon Department of Justice was scheduled to file its response to Sullivan’s lawsuit on December 5 and the State Land Board will decide how to respond at its December 12 meeting.

President Murthy left the door open to further discussions because she sees great potential in the Elliott as envisioned in Senate Bill 1546, which lays out a plan for the management and administration of the proposed research forest, but she noted that the cumulative effect of compromises with preservationist groups eroded the research viability of the forest and, with it, “the ability to serve the public good.”

Her conclusion: “Several partners and stakeholders now stand in opposition, and OSU is no longer able to participate as we had hoped.”

What’s next for Sullivan?

“Sunshine is the best disinfectant for this charade,” he said. “The more Oregonians learn about the Land Board’s illegal and unconstitutional activities, the more this mess stinks to high heaven.”

Jim Petersen, Founder and President
The non-profit Evergreen Foundation
Dalton Gardens, Idaho

2023 Clean School Bus (CSB) Rebates Program School Board Awareness Certification

By signing, I certify that I am an Authorized Representative for Yoncalla School District #32 and that Mid Columbia Bus Co. (Applicant) has made us aware that Mid Columbia Bus Co. is applying for 2023 Clean School Bus Rebate Program funding for Yoncalla School District #32. I also certify that, in discussions with Mid Columbia Bus Co, we have discussed the number of buses for replacement, the fuel type of the new buses, and which party will own the new buses.

School Board Authorized Representative

Click or tap here to enter text.		
<hr/> <i>School Board Authorized Representative Name (Print)</i> Click or tap here to enter text.	<hr/> <i>Authorized Representative Signature</i> Click or tap here to enter text.	
<hr/> <i>Authorized Representative Title</i>	<hr/> <i>Phone Number</i>	<hr/> <i>Email</i>

School District Authorized Representative

Click or tap here to enter text.		
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<hr/> <i>Authorized Representative Title</i>	<hr/> <i>Phone Number</i>	<hr/> <i>Email</i>

Applicant Authorized Representative

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<hr/> <i>Authorized Representative Title</i>	<hr/> <i>Phone Number</i>	<hr/> <i>Email</i>

From: Brian Shuldberg <brian.shuldberg@midcobus.com>
Sent: Thursday, December 14, 2023 9:35 AM
To: Brian Berry <Brian.Berry@yoncalla.k12.or.us>
Cc: Kara Wolfe <karaw@midcobus.com>
Subject: Electric Buses

Brian,

There is another round of available funds through the EPA for electric buses. We would like to apply on behalf of the district for a portion of these funds. In order to do so, we need to have some signatures on the attached forms as part of the application process.

By way of information:

- The plan is to bring in 3 Type C buses – these are 71 passenger conventional and replace like equipment from your fleet.
 - These would be used predominantly for daily routes and some shorter field trips that stay in the area. (within about 50 miles)
- We would still have gas or diesel powered special needs vehicles, type 20's and buses for travel out of the area.
- Funding – we are working to make it cost neutral – not to add cost to either your budget or ours.
- We would need to operate these vehicles for at least 5 years in the district so there is a contract implication.
- There is no obligation to accept the funds (if awarded to us) if together we decide it doesn't make sense.
- As part of the application process, Douglas Electric will need to confirm that they can provide the infrastructure to support the vehicles. This doesn't have to be done in advance, just a commitment that it can be done. We are contacting Douglas Electric to get the necessary paperwork completed.
- Midco would continue as current to own, provide insurance, maintain and train technicians on the vehicles.
- We have partnered with IC to provide the buses

Please let me know if you have questions. I will answer what I can and find answers to any that I don't know.

Brian Shuldberg
Region Vice President

