



# YAMHILL CARLTON SCHOOL DISTRICT

120 N. Larch Place - Yamhill, OR 97148 | PH: 503-852-6980 - FX: 503-662-4931 | [www.ycsd.k12.or.us](http://www.ycsd.k12.or.us)

## BOARD OF DIRECTORS

### REGULAR SESSION AGENDA

LOCATION: YCSD BOARDROOM: 120 N. LARCH PL. YAMHILL OR 97148

Or VIA ZOOM <https://us06web.zoom.us/j/91341315065>

Password: sW66uH

Thursday, November 9, 2023

Regular Session: 6:00pm

### AGENDA

#### I. Call to Order Regular Session

#### II. Flag Salute

#### III. Public Hearing on 2023-2024 Capital Projects Fund Supplemental Budget

A. Budget Report – Tami Zigler

B. Public Comment on the 2023-24 Supplemental Budget

*Public Comment – We ask that you complete an intent to speak form available at the meeting or sending it in an email to the Board Secretary at [brownm@ycschools.org](mailto:brownm@ycschools.org). The purpose of the public comment is for members of our Board of Directors to hear public concerns, comments and opinions. Board members will not respond to submitted public comment. Comments will be limited to three minutes.*

C. Discussion

E. Conclusion of Public Hearing

#### I. Individuals, Delegations, Recognitions, and Communications

A. YCHS - Student body - Verbal Report

B. YCHS - Tanner Smith & Brad Post – Student Spotlight

C. YCIS - Matt Wiles & Chad Tollefson - Verbal Report

D. YCES - Amanda Dallas – Verbal Report

*Public Comment – The Board welcomes you to its monthly meeting. We ask that you complete an Intent to Speak Form by sending an email to the Board Secretary at [brownm@ycschools.org](mailto:brownm@ycschools.org). The Board will receive public comments at this time but will defer issues to the appropriate administrator. During public comment, the Board listens but neither discusses, nor responds to questions and concerns. Speakers are limited to three minutes.*

#### II. Review of Agenda (Action Item)

#### III. Regular Session – Consent Agenda (Action Item)

A. Approval of Board of Directors Minutes

1. Regular Session Minutes: 10/12/2023

2. Work Session Minutes: 10/26/2023

B. Personnel

C. Enrollment

D. Donations

#### IV. Announcements and Reports

A. Superintendent's Report – Clint Raever – Verbal Report

B. District Facilities Report – Ian Barr – Verbal Report

C. Financials and List of Bills for October 2023 – Tami Zigler (Action Item)

D. Long Range Facilities Planning Committee Report – Scott Rose

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**V. New Business**

- A. SIA Annual Report – Chad Tollefson (Action Item)
- B. Resolution to close First Federal JR Scholarship Account (Action Item)
- C. Adopt 2023-2024 Capital Projects Supplemental Budget (Action Item)
- D. ESSER Capital Project (Action Item)
- E. Approve the superintendent, Clint Raever, to attend the National Conference in February of 2024 (Action Item)
- F. ESSER Capital Project for YCES (Action Item)

**VI. Board of Directors Comments**

**VII. Adjournment**



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LOCATION: YCSD BOARDROOM: 120 N. LARCH PL. YAMHILL OR 97148

Or VIA ZOOM <https://us06web.zoom.us/j/91341315065>

Password: sW66uH

Thursday, October 12, 2023

Regular Session: 6:00pm

## MINUTES

**Board Members Present:** Jami Egland, Susan FitzGerald, JaJetta Dumdi, Ken Watson, Erin Galyean (via zoom)

**DO/Administrative Staff Present:** Clint Raever, Tami Zigler, Mary Brown, John Horne, Tanner Smith, Brad Post, Matt Wiles, Chad Tollefson, Ian Barr

**Also Present:** Spencer Stiff, Madison Gregor, Mason Lemen, Meredith Davison, Jaclyn Aschim, Morgan Bishop, Gordon Dromgoole, Julia Howard, Amy Latrell, Marcie Gabler, Trudi Malis, Chavelle Malis, Chyna Hayward, Kristina Hayward.

**Via Zoom:** Noelle McLaughlin, Morgan Dixon, Sammie Farmer, Lissa Skipper, Jodi (no last name given)

### I. Call to Order Regular Session

Susan FitzGerald called the meeting to order at 6:00pm

### II. Flag Salute

### III. Individuals, Delegations, Recognitions, and Communications

#### A. YCHS - Student body - Verbal Report

-Spencer Stiff reported.

-The student body is working on expanding community service projects.

-They will be participating in a beach cleanup.

-They will also be holding a canned food drive.

-They are having great success in coming up with new and different projects.

#### B. YCHS - Tanner Smith & Brad Post - Verbal Report

-T. Smith and B.Post reported.

-Homecoming went well.

-The MTSS system is really being utilized. J.Dumdi asked about the engagement from the teachers. T.Smith responded that the teachers are looking at it frequently and making notes. It helps keep everyone on the same page with regards to each student.

-The attendance data in Synergy was showing 100% attendance, but it was an error in the system. The error was fixed and the data is now accurate.

-Credit recovery is going well.

-T.Smith has met with every freshmen and showed them their grades. S.FitzGerald asked what the response is from students. T.Smith responded that students are a little nervous when they are called in to meet with him, but they relax once they know the reason for the meeting.

-The seniors are being vetted based on what category they fall under in the MTSS system (red, yellow, green).

-The character strong curriculum is being reviewed. It will be taught in advisory.

-For breast cancer awareness month, students have made over 120 "pink out" shirts. They will be selling them as a fundraiser for Breast Cancer Research.

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*-An athlete study table has been started. It is a study class that is mandatory for any athlete who isn't passing a class. This motivates them to get their grades up. It started with 27 students. The following week it was already down to 18 students.*

*-Sports update: The football team has a big game against Warrenton tomorrow. The volleyball team beat Corbett, which was a big win. The boys' soccer team got their first win. Girls' soccer is #1 in the league.*

*-The OSAA asked the school to nominate a student for the student athlete advisory committee. Natalie Fry was selected.*

*-E.Galyean asked about what the high school is doing for drug and alcohol awareness. T.Smith responded there are a few advisory courses that touch on it. Yamhill County Family and Youth has provided the school with a counselor for 3 hours a week. The counselor works with students who have been disciplined for drug or alcohol use. T.Smith stated the problem with vaping is not as bad here as he has seen at the last four high schools he has been to. The majority of students at the high school are very respectful. B.Post stated they have 'cleaned up' the parking lot, which is where a lot of the problem was. They now have three adults that monitor the area at lunch and throughout the day.*

#### C. YCIS - Matt Wiles & Chad Tollefson - Verbal Report

*-M.Wiles and C.Tollefson reported.*

*-Today was the first dance with the theme of 'pink out' in honor of breast cancer awareness month.*

*-The school will be having a fall festival on October 27<sup>th</sup> from 6pm to 7pm. It will be a community wide event. There will be a classroom door decorating contest, a haunted hallway, pumpkin decorating, and Charlie Brown The Great Pumpkin will be playing.*

*-Parent/Teacher conferences will be the week of November 20<sup>th</sup>.*

*-The fall play is Alice in Wonderland. The performances will be held November 16<sup>th</sup>, 17<sup>th</sup>, and 18<sup>th</sup>.*

*-The PTO raised enough money to buy a new reader board for the school.*

*-The new bleachers have been installed in the gym.*

*-DESSA testing will begin next week.*

*-Last Wednesday, the grade level teams met and looked at the attendance data and crafted a plan based on that data.*

*-J.Dumdi asked for an update on the transition times and whether or not they are continuing to be monitored. C.Tollefson responded the 5<sup>th</sup> grade class has a few too many transitions and he will be meeting with staff about this next week to discuss how to eliminate one or two throughout the day.*

#### D. YCIS - Matt Wiles – Student Spotlight

*-Chyna Hayward presented a PowerPoint about the Reset Room.*

*-The Reset Room is a space where students can take a few minutes to calm down and regroup.*

*-The sole intent of the room is for de-escalation and to refocus the student on positive behaviors so the student can quickly return to the regular learning environment.*

*-The room has different stations that the student can use depending on how they are feeling. There is a movement station, a creative station, a sensory station, a big pillow and weighted blanket, a cozy cave, a quiet corner, and a punching bag.*

*-Some successes of the Reset Room are that it allows students to be in school and return to class, avoid getting suspended, helps them learn accountability and responsibility, gives them regulation and problem-solving skills and practice, and decreases the amount of lost instructional time.*

*-The visits to the room are short. Only 10 to 15 minutes in most cases.*

*-What triggers a visit to the Reset Room? If a teacher notices a child is struggling, they will first try classroom intervention. If that is unsuccessful, they will be sent to the Reset Room. Some students have a set break time to go to the Reset Room. A few students are able to advocate for themselves and ask to go to the Reset Room, if needed.*

E. YCES - Amanda Dallas – Verbal Report

*-A.Dallas was not present. J.Horne reported on her behalf.*

*-The staff at YCES were amazing during the smoke event that occurred last week, making sure the students were safe and in the right spots for dismissal. They have learned a few things from this event to make the safety plan even better.*

*-The Tiger Run went flawlessly this year.*

*-The building runs so smoothly because of continual support for each other and students.*

*-The Kindergarten teachers and their students are settling into routines and expectations. All day everyday is a lot for the little ones.*

*-There are a lot of fun fall activities happening including Tiger Run spirit week, a fall festival at the high school put on by the FFA, a costume parade, trunk or treat night, and PJ day.*

*-DESSA testing is taking place next week.*

*-MTSS Update: They tried to meet, but the smoke event happened. The goal this year is to continue to work on tiered attendance and support PAX building-wide. At the next meeting, SPLEEM counting will be analyzed and the staff PAX implementation survey will be reviewed.*

*This month is bullying prevention month. The board asked each school to report on what they are doing to prevent and deal with bullying.*

*-T.Smith reported that there are bullying/harassment forms that students can fill out. These forms are readily available to students and staff. Most of the time, students will go to the staff member and ask for the form. When a form is received, the student who filled it out, any bystanders, and the alleged bully are interviewed individually. This process seems to fix the issues pretty quickly. Only four forms have been filled out so far this year. Administrators and staff want to make sure that every student knows they can come to any staff member if they are being bullied.*

*-K.Watson asked about how they handle cyber bullying. T. Smith responded that if any post interferes with the educational environment, the school is allowed to weigh in on it and address it.*

*-J.Dumdi asked when parents are notified if their child is getting bullied. T.Smith responded if a student lets them know it is having a significant affect on them, the parents will be notified.*

*-J.Egland would like the schools to track how many forms are turned in to see if the system in place is working.*

*-M.Wiles reported the intermediate school uses the same form as the high school. When a form is turned in, they investigate and contact parents if necessary. Students and parents are informed that if they need additional support, the counselor can help and that there are community resources that may be helpful.*

*-Conversations are had with students frequently about bullying and how to treat others. K.Hayward has done presentations about kind behavior.*

*-At the elementary school safety and kindness are the highest priorities. They actively modify their proactive approach to help students problem solve and deal with conflict.*

*-Some examples of the proactive approaches are that teachers make positive phone calls home in the first 6 weeks of school, the principal does a monthly read aloud, problem solving slips, constant communication home, PAX building wide expectations, PAX coupons, positive office referrals, and more.*

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*-Jaclyn Aschim and other parents have concerns regarding school security at the intermediate school. Lissa Skipper had a statement that Jaclyn felt represented what the group is concerned about and let her speak on their behalf.*

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*-Lissa stated that she and other community members are concerned with the lack of security at the intermediate school. She sat down with the principal and assistant principal last year to address her concerns and, a year later, feels like nothing has been done. The schools and community can not have the mentality of 'it will never happen here'. She would like a committee to be formed to address these concerns and improve campus security.*

*-C.Raeveer agrees that there is work that needs to be done in this area and that the schools and the community need to collaborate to improve campus security. He will set up a time to meet with her to discuss this further.*

#### **IV. Review of Agenda (Action Item)**

*J.Dumdi motioned to approve the agenda as presented. J.Egland seconded. All in favor. Motion carried.*

#### **V. Regular Session – Consent Agenda (Action Item)**

- A. Approval of Board of Directors Minutes
  - 1. Regular Session Minutes: 9/14/2023
  - 2. Work Session Minutes: 9/28/2023
- B. Personnel
- C. Enrollment
- D. Donations

*K.Watson motioned to approve the consent agenda as presented. J.Egland seconded. All in favor. Motion carried.*

#### **VI. Announcements and Reports**

- A. Superintendent's Report – Clint Raeveer – Verbal Report

*-C.Raeveer reported.*

*-The admin team met about the incident that occurred on Monday, the 9<sup>th</sup> and discussed a plan and what needs to be addressed.*

*-They will be meeting with a group of law enforcement later this week to complete an after-action review.*

*-Every building's staff and students went over the steps to take in the event of an incident similar to the one that just took place.*

*-There needs to be some improvements made to the security system and Ian is working with Bright Side to address this.*

*-E.Galyean asked if there has ever been discussion of having metal detectors installed at the high school.*

*C.Raeveer responded that there has been no discussion about it.*

*-The Long-Range Facilities Planning Committee has had three meetings. They have narrowed down the scope of what the highest priorities are. Two of the biggest items are the elementary school expansion (if 4<sup>th</sup> and 5<sup>th</sup> were to be moved back to the elementary school) and the high school stadium needing to be replaced.*

*-At the next meeting, the committee will examine the cost and work to develop a unified plan, which will then be presented to the board. This may or may not lead to a bond.*

*-The information from these meetings will be shared during the next board work session.*

*-Regarding the strategic plan, K.Pond is putting a booklet together, but is waiting on the October report that is sent to the ODE for more accurate demographic information before publishing it. It should be completed in the next few weeks.*

B. District Facilities Report – Ian Barr – Verbal Report

*-I.Barr reported.*

*-They are working on applying preemergent and getting mulch down.*

*-Dealing with clogged drains and leaky irrigation.*

*-Bright Side came out and did some cellular upgrades for the fire alarms.*

*-The booster club funded the extension of seating at the baseball field.*

*-The bids for the back stairs at the high school have been narrowed down.*

*-The back door of the gym is being repaired.*

*-Bids are being obtained for fencing around the 91 building.*

*-E.Galyean asked if they ever found the water leak. Ian responded that they did not and believes it was a metering issue.*

C. Quarterly Financial Update – Tami Zigler

*-T.Zigler reported.*

*-Projected ADMw was 1254.85. The actual ADMw is 1240.31.*

*-Taxes received were \$33,270 more than budgeted.*

*-State school fund received \$269,551 more than budgeted.*

*-Increase in IGAs for SPED was \$221,540 more than budgeted.*

*-Common school fund was \$26,000 more than budgeted.*

*-Beginning cash from 2021-2022 was \$729,182 more than budgeted.*

*-Salaries were \$207,153 less than anticipated.*

*-Benefits were \$264,133 less than anticipated.*

*-Purchased services were \$297,800 less than anticipated.*

*-Supplies and materials were \$204,120 less than anticipated.*

*-Capital outlay was \$47,670 less than anticipated.*

*-\$95,000 was budgeted for the building fund.*

*-The beginning building fund is \$743,842.*

*-J.Dumdi stated that she would like to see enrollment history. T.Zigler can gather that information. C.Raeveer stated that FLO Analytics is currently working on an enrollment analysis for the future.*

D. Financials & List of Bills for September 2023 – Tami Zigler (Action Item)

*J.Egland motioned to approve the financials and list of bills for September 2023 as presented. K.Watson seconded. All in favor. Motion carried.*

## **VII. New Business**

A. FFA National Convention Travel Request (Action Item)

*-Madison Gregor, Mason Lemen, and Meredith Davison asked for the board's approval for FFA students to travel to the national FFA convention in Indianapolis and then travel to Nashville.*

*-A total of 11 people will be going. 9 students and 2 chaperones (Jodi Warner and Jared Collins).*

*-The trip will be a great learning opportunity and a chance to meet other FFA members from all over the country.*

*-The fundraising from the sales of Tiger Vines wine has covered almost all of the cost for all those going.*

*-S.FitzGerald asked how the wine is sold. M.Gregor responded that the students only market it, but parents and alumni are the ones that actually sell it. It is sold by the alumni, not by the district.*

*-K.Watson asked how many chapters from the county were going. M.Gregor responded she did not know the exact number, but that the majority of them will have members going.*

*-J.Dumdi complimented the Yamhill Carlton FFA on what a great job they do. She was at the Yamhill County Fair this year and the Yamhill Carlton FFA students stood out among the rest.*

*J.Dumdi motioned to approve the FFA chapter's request to travel to the national FFA convention in Indianapolis and Nashville in November. K.Watson seconded. All in favor. Motion carried.*

**B. Division 22 Report**

*-C.Raever shared the Division 22 report.*

*-The report is based on last year (2022-2023).*

*-The only rule that the district was not in compliance with was 581-022-2263 Physical Education Requirements.*

*-Only grades 6<sup>th</sup>, 7<sup>th</sup>, and 8<sup>th</sup> were not in compliance.*

*-The district will be in compliance for 2023-2024 with the change to the required minutes, schedule change, and added P.E. instructors.*

**C. AR Policy Updates:**

1. Naming Facilities (FF-AR)

2. Staff Expense Reimbursement (DLC-AR)

3. Instructional Materials Selection (IIA-AR)

*-C.Raever reviewed the changes made to the FF-AR, DLC-AR, and IIA-AR policies.*

**VIII. Board of Directors Comments**

*-J.Dumdi asked how the policies are kept in compliance. C.Raever stated that the district is a member of the OSBA. The OSBA notifies the district when there are any changes that need to be made to required policies due to legislative changes or when new policies are required or recommended to be created.*

*-In the future, J.Dumdi requested that the changes made to AR policies be shown on the revised policies when they are presented to the board.*

*-K.Watson asked about the 'film and video use' section of the IIA-AR policy and how the showing of entertaining films not related to the curriculum fit into the policy. C.Raever stated that the district does use PBIS (Positive Behavioral Interventions and Support) and that occasionally showing that type of film is allowed under the policy.*

**IX. Adjournment**

*S.FitzGerald adjourned the meeting at 8:03pm.*





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## BOARD OF DIRECTORS WORK SESSION AGENDA

LOCATION: YCSD BOARDROOM: 120 N. LARCH PL. YAMHILL OR 97148  
Or VIA ZOOM <https://us06web.zoom.us/j/89756606894>

Thursday, October 26, 2023

Work Session: 6:00 pm

## MINUTES

**Board Members Present:** *JaJetta Dumdi, Ken Watson, Erin Galyean*

**DO/Administrative Staff Present:** *Clint Raever, Tami Zigler, Mary Brown*

### I. Call to Order Work Session

*J.Dumdi called the meeting to order at 6:00pm.*

### II. Flag Salute

*J.Dumdi asked if any member wished to serve as board chair pro tempore and facilitate the meeting. No members volunteered. J.Dumdi served as board chair pro tempore with no objection from the board.*

### III. Safety and Risk Assessment Discussion

*-J.Dumdi asked if the district has assessments done of the campuses. T.Zigler stated that the district's insurance broker, WHA, on behalf of PACE, does do assessments, but they address safety hazards more than security.*

*-C.Raever gave an update on what the district has and is working on regarding school safety.*

*-A meeting was held with first responders on 10/13 who made recommendations on how to respond to security threats.*

*-Administrative staff from each building met with BrightSide to discuss camera and intercom needs. The district has obtained bids for camera and intercom wiring upgrades.*

*-The district also obtained bids to improve the fencing around the YCIS buildings. C.Raever showed the current plan for where the fencing would be installed.*

*-C.Raever met with a community member on 10/20 to discuss establishing a safety advisory committee that would meet three times a year and consist of a small group of staff, admin, and parents.*

*-C.Raever also met with the WESD Emergency Preparedness Director, Gene Biggs, on 10/23. They will complete a preliminary campus walkthrough on 10/27, schedule a district wide safety assessment, review and update the district EOP, conduct SRP training in each building, and conduct a crisis response training with DO staff on 11/13. E.Galyean asked if it would be a good idea to have the training done every year. C.Raever agreed that is should*

*be a yearly training since there is new staff every year. K.Watson stated that he appreciates the fact that we are using Willamette ESD and tapping into their broader expertise.*

*-There will be a lock down drill with first responders sometime in November. The community will be made aware of it prior to the drill.*

*-This summer, the plan is to rekey the buildings to have master keys instead of the numerous keys that are currently being used.*

*-Some other things that are being looked at are products that have apps that can send an alert to staff members' phones, so all are notified right away even if they aren't in a building; going back to having staff badges be used for entry into buildings instead of fobs; and setting up an electronic sign in/sign out system. This system would print a badge when the visitor signs in and would also track who is in the building.*

*-Since the community is a tight knit community, retraining staff, parents, and community members on the importance of checking in and out of the buildings regardless of who they are is something that should be considered.*

*-J.Dumdi asked if we have resource officers. C.Raever responded that Officer Livingston is the part-time resource officer for the Yamhill campuses. The district is currently working with the Carlton Police Department to set up something similar for the elementary school.*

*-Security vestibules would provide an additional layer of security at the entrances of the buildings. They have been discussed in the long-range facilities planning committee meetings and more information on those will be given at the next board meeting when R&C Management presents the report.*

*-E.Galyean asked about the funding for the planned improvements. C.Raever responded that the district is hoping to pay for the majority of the projects with ESSER funds which will need to be approved by ODE. The capital fund has a budget of \$98,000, but the district will be requesting a supplemental budget to increase to 1.5 million to help fund these projects.*

*-J.Dumdi and E.Galyean requested regular updates at the board meeting on the projects discussed and the security plan.*

#### **IV. YCTC and the Relationship with the District Discussion**

*-J.dumdi asked if the district has a contract with YCTC. C.Raever responded that there is, currently, no contract. An MOU has been drafted and is with the attorney for review.*

*-Large events, i.e. volleyball and basketball tournaments, will incur an additional fee.*

*-C.Raever asked M.Rodriguez of YCTC to provide a list of what YCTC contributes to the schools:*

*For football, provide paint for lining the YCES field. Currently working on new goal posts for YCES.*

*For volleyball, provide replacement net gear as needed for YCES and YCIS.*

*For basketball, working on replacement hoops and repair scoreboards for YCIS and YCES as needed.*

*For wrestling, assisted in the purchase of mats at YCHS.*

*For cheer, provide mats and pads for K-8 program at the cafeteria.*

*For track, working on providing new facility equipment for the YCIS/HS track.*

*For baseball, maintain JV field and middle school field, working on getting sponsorship for the JV field scoreboard, provide portable mound for YCIS field, built dugout fences at the JV field.*

*For softball, assist with YCIS multi use field.*

*-E.Galyean asked if YCTC is partnering well with schools. C.Raeveer replied they are and the only struggle is the scheduling of gym time.*

*-J.Dumdi asked if YCTC staff is background checked. C.Raeveer responded that Julie does the background checks and gives the information to YCTC along with the criteria the district uses to determine if they are cleared. The final decision is up to YCTC.*

*-E.Galyean asked about having 7<sup>th</sup> and 8<sup>th</sup> grade sports moved back to the district. C.Raeveer stated it would be a good item to discuss at the next work session, so there is time to gather more information on what it would take to do so.*

*E.Galyean mentioned communication with parents and students regarding sports sign ups. She stated that the information about sports may not be getting to everyone and kids who are new or haven't participated need to get that information as well. C.Raeveer said there is now an agreement with YCTC that the schools will post announcements from YCTC, but that it needs to be a coordinated effort and not a lot of separate messages.*

#### **V. Changes to Account Signers (Action Item)**

*K.Watson motioned to accept resolution 2024-2 to authorize the creation of online banking as presented. E.Galyean seconded. All in favor. Motion carried.*

*E.Galyean motioned to accept resolution 2024-3 for the change in authorized signers as presented. K.Watson seconded. All in favor. Motion carried.*

*K.Watson motioned to accept resolution 2024-4 for the change in authorized signers and online banking as presented. E.Galyean seconded. All in favor. Motion carried.*

*Meeting adjourned at 7:02pm*

Yamhill Carlton School District  
Human Resources  
Board Report  
November 9, 2023



**New Hires**

Ashli Ray, YCSD IA II - Floater

Kaylee Williams, YCIS ELL IA II and General Ed IA

**Resign/Retire/Term Employees**

None

**Current Employees: Position Changes**

None

**Currently Open Positions**

# Yamhill Carlton School District Enrollment Report

October

2023

## District Enrollment for 2023-24 School Year

	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
YCES	284	284								
YCIS	348	344								
YCHS	289	292								
Alliance	180	181								
<b>Total</b>	<b>1,101</b>	<b>1,101</b>	-	-	-	-	-	-	-	-

## YCES Enrollment for 2023-24 School Year

	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
Kindergarten	77	76								
1st Grade	68	69								
2nd Grade	70	69								
3rd Grade	69	70								
<b>23/24 Total</b>	<b>284</b>	<b>284</b>	-	-	-	-	-	-	-	-
22/23 Total	301	297	299	299	297	297	298	304	306	307
21/22 Total	265	269	271	264	273	274	270	268	268	266
20/21 Total	231	229	230	228	225	221	225	223	223	223
19/20 Total	362	365	366	361	363	361	358	364	367	366

## YCIS Enrollment for 2023-24 School Year

	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
4th Grade	91	88								
5th Grade	54	54								
6th Grade	65	64								
7th Grade	76	75								
8th Grade	62	63								
<b>23/24 Total</b>	<b>348</b>	<b>344</b>	-	-	-	-	-	-	-	-
22/23 Total	332	329	330	325	322	328	322	321	325	324
21/22 Total	343	342	347	349	351	348	343	347	349	345
20/21 Total	291	287	276	276	272	273	282	291	282	282
19/20 Total	308	312	311	313	307	303	303	307	307	307

For FY 18/19 19/20, the 4th grade was counted at YCES.

### YCHS Enrollment for 2023-24 School Year

	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
9th Grade	64	65								
10th Grade	75	72								
11th Grade	77	81								
12th Grade	72	72								
Transition	1	2								
<b>23/24 Total</b>	<b>289</b>	<b>292</b>	-	-	-	-	-	-	-	-
22/23 Total	293	290	288	284	290	285	286	285	284	278
21/22 Total	284	283	285	285	278	281	281	278	276	277
20/21 Total	290	290	292	290	290	290	291	291	276	291
19/20 Total	299	300	298	295	295	290	286	287	284	284

### Alliance Academy Enrollment 2023-24

	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
Kindergarten	15	15								
1st Grade	20	20								
2nd Grade	22	22								
3rd Grade	27	27								
4th Grade	21	21								
5th Grade	19	20								
6th Grade	24	24								
7th Grade	20	20								
8th Grade	12	12								
9th Grade	-	-								
10th Grade	-	-								
11th Grade	-	-								
12th Grade	-	-								
<b>23/24 Total</b>	<b>180</b>	<b>181</b>	-	-	-	-	-	-	-	-
22/23 Total	192	194	191	190	189	193	192	192	191	187
21/22 Total	137	134	135	134	127	125	129	130	129	128
20/21 Total	255	258	266	269	267	254	250	234	247	247
19/20 Total	91	91	91	92	89	90	88	88	88	88

For FY 18/19 19/20, the 4th grade was counted at YCES.



## DONATIONS

### October 2023

Knights of Pythias	Wrestling	\$750.00
B.Braus	YCHS Girls Soccer	\$150.00
Al's Garden Center	Pumpkins for Fall Festival	\$200.00

*Mission*

*The Yamhill-Carlton School District champions the growth of its students. Our students recognize their individual strengths and talents, overcome their challenges, grow past proficiency, and succeed in their aspirations so each may contribute positively to a local and global society.*



To: Board of Directors – Yamhill Carlton School District  
Clint Raever, Superintendent

From: Tami Zigler, Business Manager

Date: November 9, 2023

Re: District Financial Report

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**SUMMARY for Fiscal Year 2023-2024**

**This General Fund summary excludes Beginning Fund Balance (5400-5499).**

For the current period, total revenue was \$328,293 more than planned and total expenditures were \$186,187 less than planned. The combined result is a \$514,480 favorable surplus condition for the current year period.

**REVENUES**

**TAXES:** Taxes are \$7,430 over plan. This favorable condition represents 33.4% of the year-to-date plan amount of \$22,272. This amount is considered trivial and meets expectations based on budget appropriations. For the current year period, Taxes increased 57.8% over the prior year period compared to an average decrease of 30.6% over the preceding 4 years. The largest Taxes group - 1112 PRIOR YEAR TAXES, representing 87.7% of total Taxes, increased by 176.5%.

**TUITION, FEES, OTHER:** Tuition, Fees, Other is \$21,649 under plan. This unfavorable condition represents -50.3% of the year-to-date plan amount of \$43,003. This amount is considered material, and was primarily driven by a decrease in 1990 MISCELLANEOUS. For the current year period, Tuition, Fees, Other increased 3.6% over the prior year period compared to an average increase of 8.2% over the preceding 4 years. The largest Tuition, Fees, Other groups - 1711 ATHLETIC SIGN UP, and 1990 MISCELLANEOUS, representing 92.3% of total Tuition, Fees, Other, increased by 205.7%.

**EARNINGS ON INVESTMENTS:** Earnings on Investments are \$65,025 over plan. This favorable condition represents 1160.4% of the year-to-date plan amount of \$5,604. This variance amount is considered material, and was primarily driven by an increase in 1510 INTEREST ON INVESTMENTS. For the current year period, Earnings on Investments increased 158.8% over the prior year period compared to an average increase of 9.2% over the preceding 4 years.



**INTERMEDIATE REVENUE:** Intermediate Revenue is on plan. This amount is considered trivial and meets expectations based on budget appropriations. For the current year period, Intermediate Revenue decreased 100.0% over the prior year period.

**STATE UNRESTRICTED AID AND SSF:** State Unrestricted Aid and SSF is \$277,488 over plan. This favorable condition represents 8.6% of the year-to-date plan amount of \$3,239,092. The current year variance amount is considered material, and was primarily driven by an increase in 3101 STATE SCHOOL FUND - GENERAL SUPPORT. For the current year period, State Unrestricted Aid and SSF increased 21.5% over the prior year period compared to an average increase of 2.2% over the preceding 4 years.

## **EXPENDITURES**

**SALARIES:** Salaries are \$6,614 under plan. This favorable condition represents -0.5% of the year-to-date plan amount of \$1,325,457. This variance amount is considered trivial and meets expectations based on budget appropriations. For the current year period, Salaries increased 15.2% over the prior year period compared to an average increase of 2.5% over the preceding 4 years.

**ASSOCIATED PAYROLL COSTS:** Associated Payroll Costs are \$33,303 under plan. This favorable condition represents -4.8% of the year-to-date plan amount of \$695,870. This amount is considered tolerable, and was primarily driven by a decrease in 0213 PERS UAL CONTRIBUTION. For the current year period, Associated Payroll Costs increased 12.7% over the prior year period compared to an average increase of 4.0% over the preceding 4 years.

**PURCHASED SERVICES:** Purchased Services are \$22,176 under plan. This favorable condition represents -4.4% of the year-to-date plan amount of \$506,946. This amount is considered tolerable, and was primarily driven by a decrease in 0310 INSTR, PROF & TECH SRVS. This decrease was partially offset by an increase in 0322 REPAIRS & MAINTENANCE SERVICES. For the current year period, Purchased Services increased 46.6% over the prior year period compared to an average decrease of 7.0% over the preceding 4 years.

**SUPPLIES:** Supplies are \$139,163 under plan. This favorable condition represents -36.2% of the year-to-date plan amount of \$384,477. This amount is considered material, and was primarily driven by a decrease in 0420 TEXTBOOKS. For the current year period, Supplies decreased 5.1% over the prior year period compared to an average increase of 20.9% over the preceding 4 years.

**CAPITAL OUTLAY:** Capital Outlay is \$105,172 under plan. This favorable condition represents -80.5% of the year-to-date plan amount of \$130,615. This variance amount is considered material, and was primarily driven by a decrease in 0550 TECHNOLOGY. For the current year period, Capital Outlay increased 59.9% over the prior year period compared to an average increase of 33.6% over the preceding 4 years.

**OTHER OBJECTS:** Other Objects are \$23,995 over plan. This unfavorable condition represents 9.5% of the year-to-date plan amount of \$252,755. This variance amount is considered material, and was primarily driven by an increase in 0653 PROPERTY INSURANCE PREMIUMS. For the current year period, Other Objects increased 18.4% over the prior year period compared to an average increase of 14.8% over the preceding 4 years.

**TRANSFERS:** Transfers are \$96,246 over plan. This unfavorable condition represents 57.6% of the year-to-date plan amount of \$167,147. This amount is considered material, and was primarily driven by increases in 0791 TRANSFER TO BUILDING FUND, and 0790 OTHER TRANSFERS. For the current year period, Transfers decreased 10.3% over the prior year period. The largest Transfers groups - 0790 OTHER TRANSFERS, and 0791 TRANSFER TO BUILDING FUND, representing 88.6% of total Transfers, decreased by 2.2%.

**OTHER USES OF FUNDS:** Other Uses of Funds are on plan. This amount is considered trivial and meets expectations based on budget appropriations.

*Information provided by Frontline Analytics powered by Forecast5.*

# 100 GENERAL FUND Revenue Dashboard Summary

For the Period Ending October 31, 2023

## Actual YTD Revenues



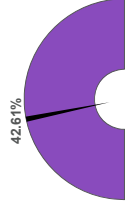
Projected YTD Revenues  
24.89%

## Actual YTD Local Sources



Projected YTD Local Sources  
1.52%

## Actual YTD State Sources



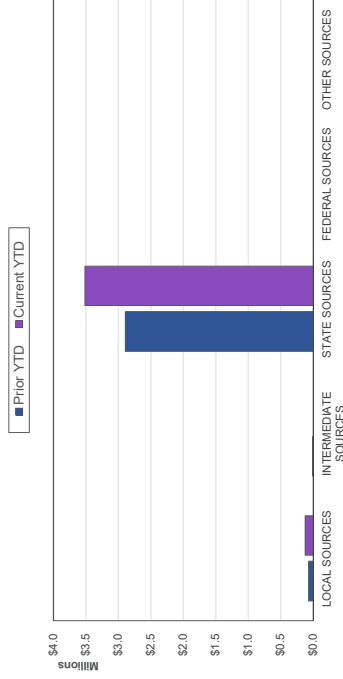
Projected YTD State Sources  
39.25%

## General Fund Revenues

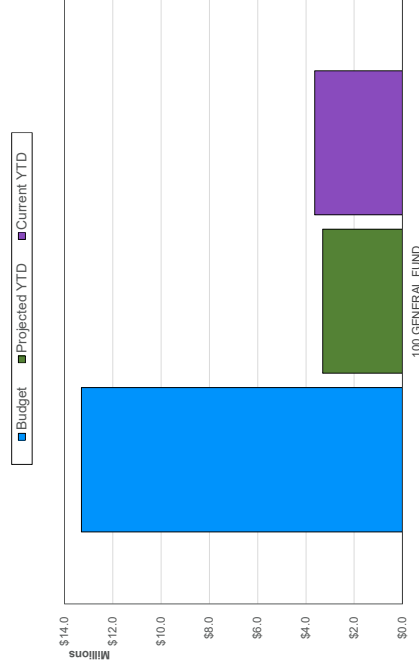
### Top 10 GENERAL FUND Sources of Revenue (Year-to-Date)

State School Fund	\$3,516,580
Resources - Beginning Fund Balance	\$2,979,668
Interest On Investments	\$70,028
Ad Valorem Taxes Levied By District	\$26,855
Admissions	\$14,150
Miscellaneous	\$5,556
Penalties And Interest On Taxes	\$2,847
Rentals	\$780
Regular Day School Transportation	\$456
Recovery Of Prior Years Expenditure	\$410
Percent of Total Revenues Year-to-Date	100.00%

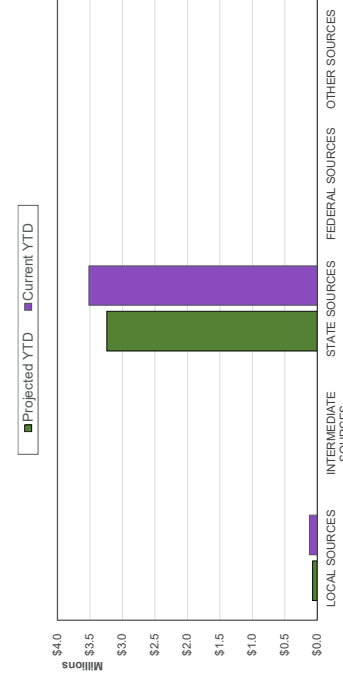
### GENERAL FUND Revenue by Source | Prior YTD vs. Current YTD



### Revenues by Fund | Budget / Projected YTD / Current YTD



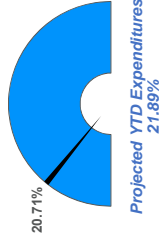
### GENERAL FUND Revenue by Source | Projected YTD vs. Current YTD



# 100 GENERAL FUND Expense Dashboard Summary

For the Period Ending October 31, 2023

## Actual YTD Expenditures



## Actual YTD Salaries/Benefits



## Actual YTD Other Objects



## General Fund Expenditures

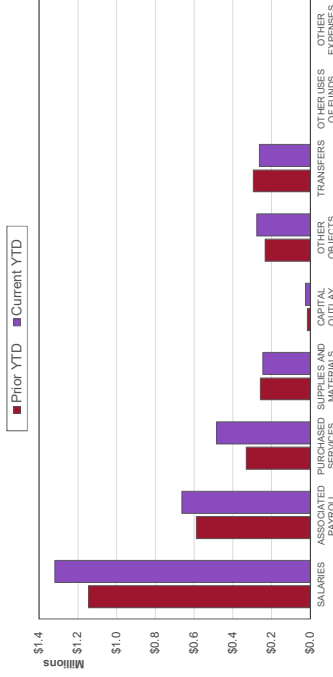
### Top 10 GENERAL FUND Expenditures by Program (Year-to-Date)

Licensed Salaries	\$520,998
Classified Salaries	\$309,232
Administrators	\$268,692
Employees Insurance	\$262,060
Pers Ual Contribution	\$217,131
Property Insurance Premiums	\$212,092
Reimbursable Student Transportation	\$130,461
Textbooks	\$123,022
Other Transfers	\$121,043
Transfer To Building Fund	\$112,350

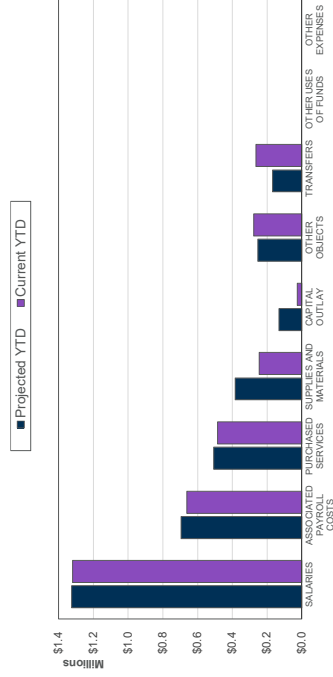
Percent of Total Expenditures Year-to-Date

69.49%

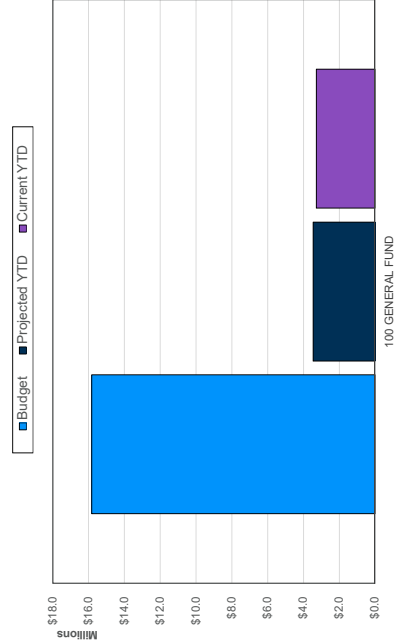
### GENERAL FUND Expenditures by Object | Prior YTD vs. Current YTD



### GENERAL FUND Expenditures by Object | Projected YTD vs. Current YTD



### Expenditures by Fund | Budget / Projected YTD / Current YTD



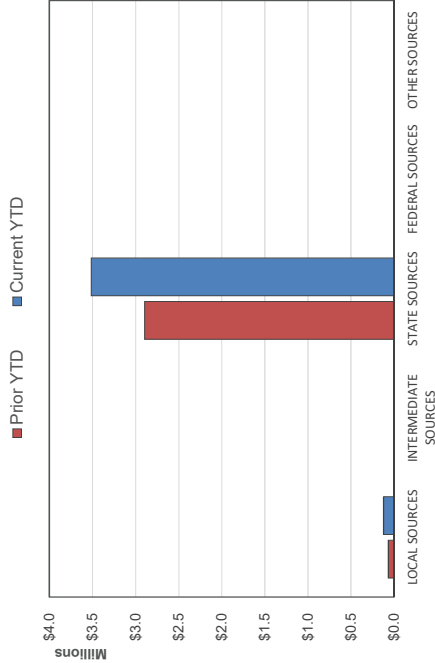
# 100 GENERAL FUND | Financial Summary by Object

For the Period Ending October 31, 2023

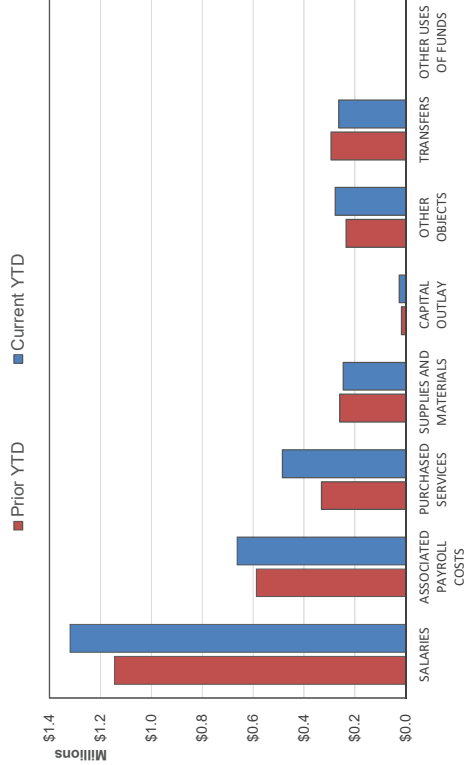
	Prior YTD	Prior Year Actual	YTD % of PY Actual
<b>Beginning Fund Balance</b>	\$ 2,229,182	\$ 2,229,182	
<b>REVENUES</b>			
Local Sources	66,718	4,408,224	1.51%
Intermediate Sources	105	285,172	0.04%
State Sources	2,894,019	8,274,565	34.97%
Federal Sources	-	-	-
Other Sources	-	-	-
<b>TOTAL REVENUE</b>	<b>\$ 2,960,842</b>	<b>\$ 12,967,961</b>	<b>22.83%</b>
<b>EXPENDITURES</b>			
Salaries	1,144,349	5,966,265	19.18%
Associated Payroll Costs	587,911	3,090,212	19.02%
Purchased Services	330,781	2,088,159	15.99%
Supplies and Materials	258,586	402,940	64.17%
Capital Outlay	15,916	89,720	17.74%
Other Objects	233,703	245,461	95.21%
Transfers	293,617	293,617	100.00%
Other Uses of Funds	-	-	-
Other Expenses	-	-	-
<b>TOTAL EXPENDITURES</b>	<b>\$ 2,864,863</b>	<b>\$ 12,156,374</b>	<b>23.57%</b>
<b>SURPLUS / (DEFICIT)</b>	<b>\$ 95,979</b>	<b>\$ 811,588</b>	
<b>ENDING FUND BALANCE</b>	<b>\$ 2,325,161</b>	<b>\$ 3,040,770</b>	

	Current YTD	Annual Budget	YTD % of Budget
<b>Beginning Fund Balance</b>	\$ 2,979,668	\$ 2,525,000	
<b>REVENUES</b>			
Local Sources	121,684	4,671,349	2.60%
Intermediate Sources	-	375,000	0.00%
State Sources	3,516,580	8,252,736	42.61%
Federal Sources	-	-	-
Other Sources	-	-	-
<b>TOTAL REVENUE</b>	<b>\$ 3,638,264</b>	<b>\$ 13,299,085</b>	<b>27.36%</b>
<b>EXPENDITURES</b>			
Salaries	1,318,843	6,464,406	20.40%
Associated Payroll Costs	662,567	3,488,252	18.99%
Purchased Services	484,770	2,505,809	19.35%
Supplies and Materials	245,314	676,516	36.26%
Capital Outlay	25,443	188,722	13.48%
Other Objects	276,749	266,987	103.66%
Transfers	263,393	283,393	92.94%
Other Uses of Funds	-	1,950,000	0.00%
Other Expenses	-	-	-
<b>TOTAL EXPENDITURES</b>	<b>\$ 3,277,080</b>	<b>\$ 15,824,085</b>	<b>20.71%</b>
<b>SURPLUS / (DEFICIT)</b>	<b>\$ 361,184</b>	<b>\$ (2,525,000)</b>	
<b>ENDING FUND BALANCE</b>	<b>\$ 3,340,853</b>	<b>\$ -</b>	

Revenues by Source | Prior YTD vs. Current YTD



Expenditures by Object | Prior YTD vs. Current YTD



**YAMHILL CARLTON SCHOOL DISTRICT  
SPECIAL REVENUE FUNDS  
FOR THE FISCAL YEAR 2023-2024  
AS OF OCTOBER 31, 2023**

<b>FUND DESCRIPTION</b>	<b>GRANT AWARD</b>	<b>REVENUE</b>	<b>EXPENDITURE</b>	<b>ENCUMBRANCE</b>	<b>BUDGET BALANCE</b>
201 TITLE I	187,701.00	-	29,948.27	150,310.54	7,442.19
204 TITLE II-A & TITLE IV-D	40,560.00	-	3,854.21	3,500.00	33,205.79
206 IDEA PART B 611	219,833.18	-	55,668.58	112,456.29	51,708.31
207 IDEA PART B 619	1,091.00	-	-	-	1,091.00
213 ESSER III FUNDS	329,723.41	-	14,184.92	52,874.76	262,663.73
215 MEDICAID ADMIN CLAIMING (MAC)	10,000.00	2,206.79	-	-	10,000.00
233 HIGH SCHOOL SUCCESS (M-98)	241,245.15	-	39,025.64	168,048.31	34,171.20
235 CTE REVITALIZATION FUNDS	29,596.74	29,596.74	-	-	29,596.74
238 CAREER PATHWAYS	-	-	-	-	-
239 OUTDOOR SCHOOL (M-99)	60,000.00	-	-	5,817.16	54,182.84
251 STUDENT INVESTMENT ACCOUNT (SIA)	1,003,215.47	-	150,747.24	570,123.80	282,344.43
261 TAP GRANTS - FACILITIES ASSESSMENT	20,000.00	-	20,000.00	-	-
261 TAP GRANTS - LONG RANGE PLANNING	25,000.00	-	12,500.00	12,500.00	-
261 TAP GRANTS - AHERA	6,000.00	-	1,500.00	-	4,500.00
LOCAL/STATE/FED GRANTS	2,173,965.95	31,803.53	327,428.86	1,075,630.86	770,906.23

<b>230 MISCELLANEOUS GRANTS</b>	<b>GRANT AWARD</b>	<b>REVENUE</b>	<b>EXPENDITURE</b>	<b>ENCUMBRANCE</b>	<b>GRANT BALANCE</b>
000 MISCELLANEOUS GRANTS	100,000.00	-	2,009.39	10,348.61	87,642.00
000 BOARD OSBA SCHOLARSHIP	5,000.00	5,000.00	-	-	5,000.00
401 ASPIRE	2,500.00	-	230.29	1,151.16	1,118.55
800 UNITED WAY - RESOURCE ROOMS	609.00	-	422.38	-	186.62
801 YCES PTO PROJECTS	319.45	-	-	-	319.45
802 AG DRONE PROJECT	1,551.45	-	-	-	1,551.45
803 VETERANS LEGACY GRANT	785.03	-	-	-	785.03
806 SOPHIA'S FUND - BUBBLE WALL	520.01	-	357.54	-	162.47
807 SOPHIA'S FUND - THEATER	2,225.69	-	393.43	821.51	1,010.75
808 MWEC CONFERENCES	1,141.13	721.13	721.13	656.64	(236.64)
809 STUDENT TEACHING	2,299.65	200.00	643.23	-	1,656.42
814 FTC ROBOTICS DONATION	1,274.00	-	-	-	1,274.00
824 EIIS GRANT	3,052.00	-	-	-	3,052.00
825 MENSTRUAL DIGNITY ACT	-	-	-	-	-
SUB TOTAL MISC GRANTS	121,277.41	5,921.13	4,777.39	12,977.92	103,522.10

<b>FUND OTHER SPECIAL REVENUE</b>	<b>BUDGET</b>	<b>REVENUE</b>	<b>EXPENDITURE</b>	<b>ENCUMBRANCE</b>	<b>BUDGET BALANCE</b>
250 FOOD SERVICE	428,600.00	60,946.36	75,378.58	319,146.41	34,075.01
265 EARLY RETIREMENT	75,000.00	78,575.17	5,276.70	18,400.00	51,323.30
266 PROFESSIONAL DEVELOPMENT	60,000.00	60,608.49	2,736.00	680.00	56,584.00
281 STUDENT BODY ACCOUNTS - YCES	30,000.00	20,326.79	-	-	30,000.00
282 STUDENT BODY ACCOUNTS - YCIS	144,000.00	65,855.22	2,497.44	1,812.96	139,689.60
283 STUDENT BODY ACCOUNTS - YCHS	300,000.00	268,863.99	12,278.56	8,391.89	279,329.55
285 ALLIANCE ACADEMY - FIELD TRIPS	-	1,966.36	-	3,000.00	(3,000.00)
SUB TOTAL OTHER SPECIAL REVENUE	1,037,600.00	557,142.38	98,167.28	351,431.26	588,001.46
TOTAL ALL 200 FUNDS	3,332,843.36	594,867.04	430,373.53	1,440,040.04	1,462,429.79

\*Balance is the Budget column minus Expenditures and Encumbrances. Actual Balance will change based on Revenues received.

**YAMHILL CARLTON SCHOOL DISTRICT**  
**FOR THE FISCAL YEAR 2023-2024**  
**DEBT SERVICES, CAPITAL PROJECT, AND FIDUCIARY FUNDS**  
**AS OF OCTOBER 31, 2023**

FUND DESCRIPTION	BEGINNING FUND				PROJECTED	
	BUDGET	BALANCE	REVENUE	EXPENDITURE	ENCUMBRANCE	BALANCE*
300 GENERAL OBLIGATION DEBT	991,750.00	117,841.93	8,010.57	-	991,750.00	-
301 QZAB DEBT	149,583.00	-	125,172.27	142,471.59	-	7,111.41
302 PERS UAL DEBT	1,976,957.00	712,525.04	251,500.80	-	1,201,372.00	775,585.00
304 JCI PROJECT DEBT	130,950.00	17,994.58	112,350.00	70,550.00	-	60,400.00
<b>TOTAL DEBT SERVICES</b>	<b>3,249,240.00</b>	<b>848,361.55</b>	<b>497,033.64</b>	<b>213,021.59</b>	<b>2,193,122.00</b>	<b>843,096.41</b>

FUND DESCRIPTION	BEGINNING FUND				PROJECTED	
	BUDGET	BALANCE	REVENUE	EXPENDITURE	ENCUMBRANCE	BALANCE*
400 CET CAPITAL PROJECTS	77,250.00	255,396.01	62,407.19	139,649.39	5,845.00	(68,244.39)
475 CAPITAL PROJECT FUND	18,540.00	488,466.01	6,369.58	-	-	18,540.00
<b>TOTAL CAPITAL PROJECTS</b>	<b>95,790.00</b>	<b>743,862.02</b>	<b>68,776.77</b>	<b>139,649.39</b>	<b>5,845.00</b>	<b>(49,704.39)</b>

FUND DESCRIPTION	BEGINNING FUND				PROJECTED	
	BUDGET	BALANCE	REVENUE	EXPENDITURE	ENCUMBRANCE	BALANCE*
785 LAUGHLIN SCHOLARSHIP FUND	54,500.00	-	2,255.00	-	1,000.00	53,500.00
<b>TOTAL TRUST IN AGENCY</b>	<b>54,500.00</b>	<b>-</b>	<b>2,255.00</b>	<b>-</b>	<b>1,000.00</b>	<b>53,500.00</b>
<b>TOTAL OTHER FUNDS</b>	<b>3,399,530.00</b>	<b>1,592,223.57</b>	<b>568,065.41</b>	<b>352,670.98</b>	<b>2,199,967.00</b>	<b>846,892.02</b>

*\*Projected Balance is the Budget column minus Expenditures and Encumbrances. Cash Balance is actual revenues and expenditures to date.*

Yamhill-Carlton School District No. 1

Approval of Bills Report

Fiscal Year: 2023-2024

Criteria: From Check Date: 10/01/2023 To: 10/31/2023 Voucher: ALL  
Report Sort: FUND From Fund: 100 To: 900 ☐ Page Break ☒ Exclude Invoice Description

Check Number	Vendor	Amount
100 - GENERAL FUND		
0	ALISON CHEATHAM	\$935.24
60983	ALPHA OMEGA PLUMBING LLC	\$1,420.00
0	AMANDA GREENE	\$500.00
0	AMAZON CAPITAL SERVICES	\$1,763.57
0	AMUZU, NICOLE M	\$45.20
0	BELT-VERHOEF, STEPHANIE	\$108.08
0	BETHANY HAGGARD	\$1,000.00
0	BIRMAN, BRIANNE L	\$44.28
0	BOTTEN'S EQUIPMENT RENTAL INC	\$323.60
0	BRIGHTSIDE ELECTRIC AND	\$9,656.80
0	CALEB WELLBROCK	\$182.27
0	CATHERINE WEAVER	\$240.00
0	CDW-GOVERNMENT, INC	\$1,890.00
0	CENGAGE LEARNING INC	\$3,250.80
0	CENTURY LINK	\$194.81
61017	CHELSEA PETERSON	\$674.00
0	CHELSEA POGUE	\$297.91
60961	CITY OF CARLTON	\$4,810.41
60962	CITY OF YAMHILL	\$8,226.78
61037	CITY OF YAMHILL	\$3,125.00
61038	CLASSROOM LAW PROJECT	\$300.00
0	COLLINS, JARED MICHAEL	\$38.98
0	COOK, MAUREEN	\$329.65
60999	COSA	\$325.00
61000	DAVISON AUTO PARTS	\$12.56
0	DAWN MARIE PEREZ	\$998.00
0	DELL INC	\$1,748.12



Yamhill-Carlton School District No. 1

Approval of Bills Report

Fiscal Year: 2023-2024

Criteria: From Check Date: 10/01/2023 To: 10/31/2023 Voucher: ALL  
Report Sort: FUND From Fund: 100 To: 900 ☐ Page Break ☒ Exclude Invoice Description

Check Number	Vendor	Amount
100 - GENERAL FUND		
61001	DEMCO	\$148.77
61002	ELMIRA HIGH SCHOOL	\$90.00
0	ESS WEST LLC	\$22,905.13
61018	ESTUARDO GARCIA	\$212.65
60963	FLO ANALYTICS	\$5,300.00
61019	GIUDICE, BEN	\$400.00
60964	GOPHER BUSTERS	\$35.00
0	HEIDI MAE HEGE	\$1,000.00
60965	HONEY BUCKET	\$305.00
61039	HONEY BUCKET	\$435.00
60984	IRON MOUNTAIN INCORPORATED	\$406.95
61020	JACOB JOHNSON	\$115.73
61021	JOHN DORT	\$97.00
0	JONATHAN GROVER	\$676.00
60966	JORAMO, REBECCA I	\$147.89
61022	KATHERINE BONNER	\$638.14
0	KATIE LEN WAI	\$883.26
0	KATIE PORRITT	\$1,460.15
0	KONE INC	\$1,363.31
0	KOOPMAN, KRISTY	\$77.81
0	KRISTA CAIN	\$479.18
0	LATISHA BARKER	\$209.95
61023	LAURIANO BARAJAS	\$740.00
60985	LAWRENCE COMPANY	\$100.00
60986	LEARNING WITHOUT TEARS	\$132.00
61024	LOMELI, JASMINE	\$90.00
61025	LORI BROUILLETTE	\$323.58

# Yamhill-Carlton School District No. 1

## Approval of Bills Report

Fiscal Year: 2023-2024

Criteria: Report Sort: FUND From Check Date: 10/01/2023 To: 10/31/2023 Voucher: ALL  
 From Fund: 100 To: 900 ☐ Page Break ☒ Exclude Invoice Description

Check Number	Vendor	Amount
<b>100 - GENERAL FUND</b>		
61004	LOWE'S COMPANIES INC.	\$75.42
61026	LOWE'S COMPANIES INC.	\$51.87
61041	LOWE'S COMPANIES INC.	\$90.68
60967	LPG SPECIALTIES LLC	\$4,200.00
0	LUKE STUBBS	\$50.00
60968	MARION AG SERVICE INC	\$385.20
61042	MARION AG SERVICE INC	\$770.40
0	MCCATHRON, EMILY D	\$46.83
60969	MCMINNVILLE GAS INC.	\$96.50
61043	MCMINNVILLE GAS INC.	\$9,678.75
0	MEGHAN PLIES	\$457.92
61027	MELANIE ANNE LAKE	\$193.00
0	MICHAEL CRISP	\$703.00
0	MICHAEL ERWIN	\$272.00
0	MID COLUMBIA BUS CO., INC	\$75,639.19
61028	MOLLY PEASE	\$240.00
61046	NORTHWEST TEXTBOOK DEPOSITORY	\$10,101.00
61029	NW WATER STOP INC	\$855.65
60987	OACA	\$845.00
0	OETC	\$6,578.50
61005	OFFICE DEPOT, INC	\$1,726.54
60970	OREGON SMALL SCHOOLS ASSOC	\$1,026.00
60971	OSBA	\$800.00
0	PACIFIC OFFICE AUTOMATION	\$3,028.55
0	PACIFIC OFFICE AUTOMATION (LEASE)	\$1,555.00
61030	PARKER BALDWIN	\$1,012.71
60988	PLATT ELECTRIC SUPPLY	\$40.29

# Yamhill-Carlton School District No. 1

## Approval of Bills Report

Fiscal Year: 2023-2024

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 From Fund: 100 To: 900 ☐ Page Break ☒ Exclude Invoice Description

Check Number	Vendor	Amount
<b>100 - GENERAL FUND</b>		
61006	PORTLAND GENERAL ELECTRIC	\$12,625.15
0	POST, BRADLEY A	\$110.76
0	PROCARE THERAPY	\$5,400.00
60989	PROPER PRINT SOURCE LLC	\$242.34
60972	RAINBOW RESOURCE CENTER, INC	\$8,290.32
60990	RAINBOW RESOURCE CENTER, INC	\$134.09
61031	REBEKAH D SMITS	\$178.17
60973	RECOLOGY WESTERN OREGON GARBAGE	\$1,154.19
60974	REID RENTAL INC	\$206.00
0	RIVERSIDE INSIGHTS	\$1,203.00
61048	ROGUE FITNESS	\$299.00
61049	SAFEGUARD FIRE EXTINGUISHER	\$725.50
60991	SALEM FOOTBALL OFFICIALS	\$3,795.36
61009	SALEM SOCCER REFEREES ASSOC.	\$3,987.68
61050	SALEM WRESTLING OFFICIALS	\$3,959.45
0	SAVAS LEARNING COMPANY LLC	\$129.91
60975	SEAL, LIBERTY A	\$16.19
0	SIERRA SPRINGS	\$56.95
61051	SIMPLOT AB RETAIL INC	\$61.71
61010	SLAYTON, KIANNA E	\$127.17
61032	STEPHANI DEL RIO	\$1,175.55
61011	STRUCTURED COMMUNICATIONS SYSTEMS INC	\$3,248.37
0	SUNDAY, ERIN	\$40.00
0	TAD BECKWITH	\$232.76
60977	THE HOME DEPOT PRO	\$735.60
61052	THE HOME DEPOT PRO	\$1,862.89
61012	THE YARD ARTISAN LLC	\$130.00

Yamhill-Carlton School District No. 1

Approval of Bills Report

Fiscal Year: 2023-2024

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From Fund: 100 To: 900 ☐ Page Break ☒ Exclude Invoice Description

Check Number	Vendor	Amount
100 - GENERAL FUND		
0	UMPQUA BANK-CC	\$2,023.05
60978	UNITED RENTALS (NORTH AMERICA) INC	\$127.50
61053	UNITED RENTALS (NORTH AMERICA) INC	\$127.50
61033	VALERIE BREWER	\$840.94
0	VANDERZANDEN, BRENDA R	\$79.64
0	VERIZON WIRELESS	\$109.44
60979	WESTSIDE CHRISTIAN HIGH SCHOOL	\$300.00
60995	WILCO	\$147.87
61034	WILCO	\$43.60
0	WILES, MATTHEW	\$56.03
0	WILKINS, JOSEPH RIBURN	\$81.17
61014	WILLAMETTE HVAC	\$612.50
61054	WILLAMETTE HVAC	\$5,612.83
61055	WILLAMETTE UNIVERSITY	\$100.00
61056	YAMHILL CARLTON ELEMENTARY	\$1,550.00
61015	YAMHILL CARLTON HIGH SCHOOL	\$1,250.00
61057	YAMHILL CARLTON HIGH SCHOOL	\$550.00
61058	YAMHILL CARLTON TOGETHER CARES, INC.	\$1,650.00
61016	YAMHILL COUNTY HEALTH & HUMAN SERVICES	\$10,485.98
0	YAMHILL SHELL STATION	\$280.46
60996	ZIPLY FIBER	\$3,497.50
Total for 100 - GENERAL FUND		\$281,387.68
204 - TITLE IIA		
61044	MICHAEL GRINDER AND ASSOCIATES	\$3,854.21
Total for 204 - TITLE IIA		\$3,854.21

206 - IDEA PART B SECTION 611

Yamhill-Carlton School District No. 1

Approval of Bills Report

Fiscal Year: 2023-2024

Criteria: Report Sort: FUND From Check Date: 10/01/2023 To: 10/31/2023 Voucher: ALL  
From Fund: 100 To: 900 ☐ Page Break ☒ Exclude Invoice Description

Check Number	Vendor	Amount
206 - IDEA PART B SECTION 611		
0	AMAZON CAPITAL SERVICES	\$11,452.29
0	CURRICULUM ASSOCIATES LLC	\$201.60
0	DELL INC	\$7,502.15
61007	PRO-ED	\$1,307.90
61008	REHABMART LLC	\$795.56
60994	THINK SOCIAL PUBLISHING	\$207.03
61013	TOUCHMATH	\$2,776.14
0	UMPQUA BANK-CC	\$328.00
Total for 206 - IDEA PART B SECTION 611		\$24,570.67
213 - ESSER III FUNDS		
0	AMAZON CAPITAL SERVICES	\$696.86
Total for 213 - ESSER III FUNDS		\$696.86
230 - MISC GRANTS		
0	AMAZON CAPITAL SERVICES	\$357.54
0	UMPQUA BANK-CC	\$2,009.39
Total for 230 - MISC GRANTS		\$2,366.93
233 - MEASURE 98		
0	AMAZON CAPITAL SERVICES	\$44.44
0	ESS WEST LLC	\$131.04
0	UMPQUA BANK-CC	\$110.16
Total for 233 - MEASURE 98		\$285.64
250 - FOOD SERVICES		
0	ESS WEST LLC	\$139.22
0	GOODY MAN DISTRIBUTING INC	\$611.06
61003	HUBERT COMPANY LLC	\$2,660.95
61045	MIKES RESTAURANT EQUIPMENT LLC	\$1,340.18

Yamhill-Carlton School District No. 1

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Check Number	Vendor	Amount
250 - FOOD SERVICES		
0	SPRING VALLEY DAIRY INC	\$1,259.97
60976	SYSCO FOOD SERVICES	\$3,182.46
60993	SYSCO FOOD SERVICES	\$2,701.30
61035	SYSCO FOOD SERVICES	\$4,790.53
61036	SYSCO FOOD SERVICES	\$1,083.06
Total for 250 - FOOD SERVICES		\$17,768.73
251 - STUDENT INVESTMENT ACCOUNT		
0	ESS WEST LLC	\$262.06
Total for 251 - STUDENT INVESTMENT ACCOUNT		\$262.06
261 - TAP GRANT ODE		
61047	R&C MANAGEMENT GROUP LLC	\$3,750.00
Total for 261 - TAP GRANT ODE		\$3,750.00
280 - STUDENT BODY FUNDS		
0	AMAZON CAPITAL SERVICES	\$1,690.24
61001	DEMCO	\$100.03
60992	SCHOOL LIFE	\$64.20
Total for 280 - STUDENT BODY FUNDS		\$1,854.47
282 - YCIS STUDENT BODY		
3524	DRAMATIC PUBLISHING COMPANY	\$905.55
0	HUXMAN, MEGAN L	\$256.49
Total for 282 - YCIS STUDENT BODY		\$1,162.04
283 - YCHS STUDENT BODY		
20744	ACT INC	\$1,037.00
0	BSN SPORTS LLC.	\$845.06
20742	EDUCATIONAL THEATRE ASSOCIATION	\$129.00

Yamhill-Carlton School District No. 1

Approval of Bills Report

Fiscal Year: 2023-2024

Criteria: From Check Date: 10/01/2023 To: 10/31/2023 Voucher: ALL  
Report Sort: FUND From Fund: 100 To: 900 ☐ Page Break ☒ Exclude Invoice Description

Check Number	Vendor	Amount
283 - YCHS STUDENT BODY		
20741	LOWER WILLAMETTE FFA DISTRICT	\$1,320.00
0	MCGHEHEY, TRACIE S	\$176.20
20743	OACA	\$125.00
20745	OASC	\$225.00
0	OPITZ, MATTHEW B	\$289.97
0	UMPQUA BANK-CC	\$1,671.28
Total for 283 - YCHS STUDENT BODY		\$5,818.51
400 - CAPITAL PROJECT FUNDS - CET		
61040	KCDA PURCHASING COOPERATIVE	\$46,872.00
Total for 400 - CAPITAL PROJECT FUNDS - CET		\$46,872.00
Grand Total:		\$390,649.80

End of Report

Yamhill-Carlton School District No. 1

Expenditure Summary Report

Fiscal Year: 2023-2024

Criteria: Report Sort: Fund

From Date: 10/01/2023

To Date: 10/31/2023

Fund: 100	GENERAL FUND	Check#	FUND	FUNCTION	OBJECT	Amount
UMPQUA BANK-CC						
	0	GENERAL FUND		BOARD OF EDUCATION SERVICES	CONSUMABLE SUPPLIES & MATERIALS	\$65.32
	0	GENERAL FUND		BOARD OF EDUCATION SERVICES	INSTR, PROF & TECH SRVS	\$24.99
	0	GENERAL FUND		GUIDANCE SERVICES	NON-CONSUMABLE ITEMS	\$25.00
	0	GENERAL FUND		GUIDANCE SERVICES	PROF & IMPROVE COSTS NON-INSTRUCTIONAL STAFF	\$165.00
	0	GENERAL FUND		HIGH SCHOOL PROGRAMS	TEXTBOOKS	\$670.00
	0	GENERAL FUND		HIGH SCHOOL-EXTRACURRICULAR	DUES AND FEES	\$174.90
	0	GENERAL FUND		OFFICE OF THE PRINCIPAL	CONSUMABLE SUPPLIES & MATERIALS	\$776.84
	0	GENERAL FUND		OPERATION & MAINTENANCE - PLANT SERVICES	REPAIRS & MAINTENANCE SERVICES	\$55.00
	0	GENERAL FUND		STUDENTS WITH MENTAL DISABILITIES - LIFE SKILLS	INSTR, PROF & TECH SRVS	\$66.00
				Total for UMPQUA BANK-CC		\$2,023.05
				Total for GENERAL FUND		\$2,023.05
Fund: 206	IDEA PART B SECTION 611	Check#	FUND	FUNCTION	OBJECT	Amount
UMPQUA BANK-CC						
	0	IDEA PART B SECTION 611		RESOURCE ROOMS	COMPUTER SOFTWARE	\$196.00
	0	IDEA PART B SECTION 611		RESOURCE ROOMS	INSTR, PROF & TECH SRVS	\$132.00
				Total for UMPQUA BANK-CC		\$328.00
				Total for IDEA PART B SECTION 611		\$328.00
Fund: 230	MISC GRANTS	Check#	FUND	FUNCTION	OBJECT	Amount
UMPQUA BANK-CC						
	0	MISC GRANTS		HIGH SCHOOL-EXTRACURRICULAR	CONSUMABLE SUPPLIES & MATERIALS	\$462.00
	0	MISC GRANTS		HIGH SCHOOL-EXTRACURRICULAR	INSTR, PROF & TECH SRVS	\$880.00



Yamhill-Carlton School District No. 1

Expenditure Summary Report

Fiscal Year: 2023-2024

Criteria: Report Sort: Fund

From Date: 10/01/2023 To Date: 10/31/2023

Fund: 230		MISC GRANTS		Check#	FUND	FUNCTION	OBJECT	Amount
Remit Name				0	MISC GRANTS	HIGH SCHOOL-EXTRACURRICULAR	TRAVEL; OUT OF DISTRICT	\$667.39
				Total for UMPQUA BANK-CC				\$2,009.39
				Total for MISC GRANTS				\$2,009.39
Fund: 233		MEASURE 98		Check#	FUND	FUNCTION	OBJECT	Amount
Remit Name				0	MEASURE 98	HIGH SCHOOL PROGRAMS	COMPUTER SOFTWARE	\$110.16
				Total for MEASURE 98				\$110.16
Fund: 283		YCHS STUDENT BODY		Check#	FUND	FUNCTION	OBJECT	Amount
Remit Name				0	YCHS STUDENT BODY	HIGH SCHOOL-EXTRACURRICULAR	CONSUMABLE SUPPLIES & MATERIALS	\$1,671.28
				Total for YCHS STUDENT BODY				\$1,671.28
				Grand Total:				\$6,141.88

Recap for FUND for GENERAL FUND

100	GENERAL FUND	\$2,023.05
206	IDEA PART B SECTION 611	\$328.00
230	MISC GRANTS	\$2,009.39
233	MEASURE 98	\$110.16
283	YCHS STUDENT BODY	\$1,671.28

End of Report



**"SMALL SCHOOLS, BIG ACHIEVEMENTS"**

# **YAMHILL CARLTON SCHOOL DISTRICT LONG RANGE FACILITY PLANNING COMMITTEE**

**REPORT TO BOARD OF DIRECTORS  
November 9, 2023**



**COMPILED BY**  
**R&C  
MANAGEMENT GROUP, LLC**



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(to provide to the state)**

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**UPDATED ENROLLMENT PROJECTIONS (FLO ANALYTICS)**

**(ASSESSMENTS PROVIDED UNDER SEPARATE COVER)**



## EXECUTIVE SUMMARY

The Yamhill Carlton School district Board of Directors authorized the hiring of R&C Management Group in February 2023 to conduct facility assessments and facilitate long range facility planning in response to receiving a State 2021 Technical Assistance Program (TAP) Grant which was required to be fully executed by December 1, 2023.

Interviews and assessments were conducted by R&C management Group March 2023 – June 2023 with a status report provided in July 2023 and state assessment forms completed August 2023.

In August 2023, the Yamhill Carlton School District reached out to community members and staff to participate in a long range facility planning process in September and October of 2023. This report is the culmination of those efforts.

### COMMITTEE MEMBERS:

Tami Zigler  
Ian Barr  
Clint Raever  
Susan FitzGerald  
Amanda Dallas  
Kay Echaury  
Sherri Nauman  
Matt Wiles

Lisa Mulholland  
Brad Post  
Kaitlyn Clements  
Jo Lyn Hamilton  
Neil Slater  
Brian King  
Murray Paola  
Buzz Ready

Tom Sherwood  
Roy Durfee  
Julia Howard  
Jordan Slavish  
Mary Brown  
Jami Eglund

Facilitated By: Scott Rose, R&C Management Group







# EXECUTIVE SUMMARY

## MEETING SUMMARY

Through the process, approximately \$40 million in facility needs were identified by R&C management Group and Yamhill Carlton School District between the three school district sites.

The committee spent the first meeting touring each of the 3 sites and discussing observed needs as well as past projects and perceptions of the successes and challenges of that prior work.

The second meeting was spent understanding budgeting and small group discussions regarding prioritization of the largest district needs that would become drivers for further discussion. Additional data was provided regarding bonding rates and enrollment projection data.

The third meeting included longer small group sessions to create a comprehensive "PHASE 1 RECOMMENDATION" with an understanding that not all needs are reasonable to address at once given financial limitations.

The fourth, and final, meeting worked through a common plan and fine tuned it based on a large group discussion. The resulting plan had two components: 1) a prioritized list of needs with option recommendations and 2) an outline recommendation of communications with the community-at-large based on past challenges.





# EXECUTIVE SUMMARY

## PLAN RECOMMENDATION AND OPTIONS

### LIST OF COMMITTEE'S TOP TIER PROJECTS

CONSENSUS PHASE 1 PLAN			
PRIORITIZATION	SCOPE	OVERALL PROJECT BUDGET	EXPECTED REMAINING LIFE NOTES
1	HIGH SCHOOL: Replace stadium with all-aluminum grandstand, full roof, press box, ADA, restrooms, concession, and storage	\$3,602,000	0 years - closed till investment is made in replacement
2	ALL SCHOOLS: Provide 3 interior security vestibules with minor office reconfiguration and access controls with door release	\$480,000	2 years - entry vestibules are considered basic security provisions at a school, and none of the 3 schools have them - first opportunity should be prioritized
3	HIGH SCHOOL: At original building, repair cracked walls, expose from exterior and waterproof, and re-work existing storm system / paving to collect and divert away from building and off site	\$470,000	2 years - water intrusion occurring now and will have impacts to other surfaces
4	INTERMEDIATE: Remove and replace all single ply roof (upgrade insulation and replace rotted sheathing)	\$770,000	2 years - leaks occurring now and mitigated with spot repairs
5	ELEMENTARY: Replace in-room compressors and modify runtime to morning warmup; supplement classrooms with new rooftop air handlers (centralized heating and cooling) with Digital Controls	\$1,683,000	2 years - compressors failing regularly and heat build up in warmer months impacting learning
6	HIGH SCHOOL: Upgrade mechanical in original building to include cooling in all instructional areas, boiler re-tubing, and new digital controls	\$1,148,000	2 years - in failure now and heat in warmer months makes spaces unusable
7	INTERMEDIATE: Remove and replace wood siding and repair masonry cracks, repoint, and re-seal masonry veneer	\$554,000	4 years - in failure now and mitigated with spot repairs
8	INTERMEDIATE: Remove and replace asphalt at main parking lot and make pavement repairs at roadways. Include storm system replacement at parking and building perimeter	\$806,000	2 years - asphalt in failure and storm drainage issues now approaching entry points
9	ELEMENTARY: Remove and replace all asphalt at main parking lot and side access road; overex soft spots, add catch basins and storm pipe for better storm control	\$455,000	2 years - in failure now
10	ELEMENTARY: Construct new 4720 sf gymnasium at covered play area plus ADA connectivity, include restrooms (code) and add back covered play area at 3500 sf.	\$5,359,000	2 years - already an impact to instruction with current enrollment
11	ELEMENTARY: Construct new 10,800 sf 6-classroom addition at 2 stories with restrooms and off back of last addition - house 4th & 5th grades back at elementary school	\$9,547,000	4 years - projection for growth to exceed capacity
12	INTERMEDIATE: Mechanical system upgrade to include replacement of digital controls and the addition of cooling to the original building	\$886,000	10 years - existing system serviceable and supplemented with portable units
13	HIGH SCHOOL: Replace all flooring (some asbestos) in corridors and rooms in original building except old wood floors (strip and refinish) and remove wall carpet	\$902,000	10 years - surfaces in tact but odor, condition, and presence of asbestos are contributing factors
		<b>\$26,662,000</b>	



## EXECUTIVE SUMMARY

### PLAN RECOMMENDATION AND OPTIONS

The \$26.662 million list is inclusive of the highest priority items in the district as determined by the committee. To put this whole amount onto a General Obligation Bond is estimated to add \$1.49 / thousand dollars of assessed value on top of the current debt of approximately \$1.11. These budgets and the estimated tax rate assumes a November 2024 Election. This is considered by the committee to be too high of an increase to the local taxpayers.

There is a State OSCIM grant, available to the Yamhill Carlton School District that equates to \$6 million. Once the assessment and planning documents are submitted by December 1, 2023, the district remains eligible for this grant through 2027. There are two considerations:

Application for this grant is on December 15<sup>th</sup> and July 15<sup>th</sup> of each year for the May and November elections, respectively. With the assumption of a November 2024 bond, that would require an application on July 15, 2024. These are highly competitive grants. Approval of release of a grant to the Yamhill Carlton School District would be known within one week of the application. This grant requires that the district pass a general obligation bond in order to receive it, as it is a “matching grant”.

Additionally, to pursue a bond beyond November 2024, the recommended budgets will be impacted due to inflation and potential further deterioration of conditions.

If the full recommended scope was placed on a general obligation bond AND the OSCIM grant was received, that would drop the bond amount to \$20.662 million or an estimated tax rate of \$1.16 / thousand dollars of assessed value. The committee was divided on whether this level should be pursued as an added tax to local voters. Community polling and town halls were recommended to gauge support.

For those committee members that felt the bond request (even with the OSCIM grant) was too high, their conclusion was that the grandstand may be able to be privately funded through donations and that the remaining items would need to be significantly reduced closer to a \$10 million request. This may include the removal of the classroom addition at the elementary school if the OSCIM grant is received or removal of the classroom AND gym addition, if the OSCIM grant is not received. The focus would then shift to just the preservation of existing structures.



# EXECUTIVE SUMMARY

## **PLAN RECOMMENDATION AND OPTIONS**

Before any options are pursued, it is highly recommended that multiple polls and townhall-style meetings be conducted to reveal the larger community sentiment. From that data, the “plan” will likely follow one of these 4 paths:

### **PLAN 1**

Do everything on the list. There is slow and steady growth in the district. If polling indicates that the majority of voters want 4<sup>th</sup> and 5<sup>th</sup> grade to move to the elementary school, a case can be made for this bond in its totality. This addresses every school’s most pressing issues – “a chicken in every pot”. It would still be a hard sell given the current debt, but the \$6 million OSCIM grant would help reduce the tax impact.

### **PLAN 2**

Pull out the elementary classroom addition and do everything else on the list. The addition is partly due to growth but also is driven by a desire to move 4<sup>th</sup> and 5<sup>th</sup> grade to the elementary school. This project is not universally supported. There is also the question of what happens to the empty space at the intermediate school. That space could be converted to CTE and cafeteria and kitchen and resolve the safety issues of young students going back and forth on campus, but is an expensive choice where fencing and other controls could make the same positive impact to safety. Removing this project and getting the OSCIM grant, could drop a bond to about \$10 million and be more palatable to the voters.

### **PLAN 3**

Move forward with a building preservation bond only or as 2 propositions. An option being looked at by more districts is a 2 proposition bond. Prop 1 includes the most basic projects that if not done through a bond, then must be done through the general fund due to the short life expectancy of those systems. Prop 2 includes the other needed items BUT is only passed if Prop 1 is passed too. This gives voters 2 “bond levels” to vote on: Prop 1 or Prop 1 and 2 combined. If there are tax concerns but they support schools, it allows them to vote for Prop 1 and not Prop 2, so the critical needs that keep the district facilities operating are not sacrificed for projects that may be more controversial. Prop 1 could include everything but the YCHS floors, and the 2 elementary additions and run under \$10 million. Those three projects would run in Prop 2. You give the voters choices and can go out for Prop 2 again (if it does not pass) the subsequent year as “still important” but the other projects move forward and trust is re-built with the community.

### **PLAN 4**

Do not pursue a bond in 2024 and fundraise for repairs to the stadium. An estimate of \$300k was provided to perform structural repairs. This does not address ongoing rot, aesthetics, ADA functionality, or growing program needs. While this work might be an initial rally point for the community, it could backfire because this will NOT extend the life of the bleachers, only make them safe, for the moment, to re-open. The district could suffer criticism for “throwing good money after bad” by spending more funds on a structure that is at the end of its useful life. Additionally, mechanical, roofing, and parking lot needs will continue to get worse, and may counter any good PR from the stadium work with negative reviews in other areas.





# EXECUTIVE SUMMARY

## PLAN COMMUNICATIONS

Pursuing any bond funds will be strongly influenced by not only taxpayer tolerance but also the perceptions of the work conducted under the prior bond program. Concerns raised regarding that program included:

- Perception that bond scope was not fully completed
- Budget overruns were preventable
- Material choices were not always in the district's best interests

Safeguards to prevent these challenges were discussed during the last program but apparently were ineffective, not followed, or a combination of these factors. The committee considered it imperative that any pursuit of a bond be preceded by a series of communication sessions to identify / confirm prevailing concerns and to strategize on methods to overcome poor perceptions regarding the last program. These then must be "rolled out" with the bond information as part of the same messaging and commitment.

Among potential strategies mentioned were the following:

- Development of Technical Systems and Material Standards that are incorporated into each design and construction contract.
- Bond scope shall be provided with a higher level of specificity so exact parameters as it relates to areas of impact, level of repair / replacement, and intended end result are clearly defined.
- Incorporation into all contracts specific reporting protocols regarding confirmation that these standards have been met and requiring this of the construction manager ahead of approval of designs and acceptance of construction.
- All substitution requests of materials or systems (only allowed if there is no availability), be vetted and approved by the Board. Otherwise, substitutions are to be rejected.
- The Executive level committee (administration and Board) shall be the sole reviewer of designs through the Schematic level to confirm that scope has not increased, budget has been maintained, and standards have been met. Only at the Design Development level shall site-based committees be engaged, so as to maintain strong cost management.

## END OF EXECUTIVE SUMMARY





# YAMHILL CARLTON SCHOOL DISTRICT

120 N. Larch Place - Yamhill, OR 97148 | PH: 503-852-6980 - FX: 503-662-4931 | www.ycsd.k12.or.us

## Yamhill Carlton School District Student Investment Account (SIA) 2022-2023 Annual Report

Required Question	Responses
1. What changes in behavior, actions, policies or practices have you observed related to SIA implementation during the 2022-23 school year? How do you see these changes contributing to the goals and outcomes in your SIA plan?	Additional staffing continues to allow us to provide increased academic and behavioral support for students. Significantly, this has allowed highly dysregulated students to build stamina and strategies to access their learning. MTSS systems continued to develop and expand within our schools, and data teams became more proficient in utilizing data to accelerate the academic and emotional learning of their students. Our work continued to contribute to the SIA goals of improving the academic, behavioral, and emotional capability of our students.
2. What barriers or challenges to SIA implementation have you experienced that are helpful for your community and/or state leaders to be aware of? What adjustments, if any, did you make to your SIA plan as a result of these challenges?	The challenge we have experienced with the implementation of our SIA plan is that of hiring and retaining qualified personnel. This has made it more difficult to keep initiatives moving forward due to the need to retrain new staff. In addition, instructional effectiveness was impacted because some positions remained vacant or were filled with less qualified candidates.
3. SIA implementation includes ongoing engagement with all students, focal students, families, staff, and community partners. How have relationships with or between those groups changed and/or been maintained throughout this academic year? Consider the Community Engagement Toolkit and where your efforts might land on the Levels of Community Engagement spectrum as you complete your response.	Community engagement was increased this year, largely due to engagement efforts associated with the Integrated Guidance Plan. Parent surveys, student surveys, staff surveys, PTO and Booster club discussions, feedback interviews with City Leadership, and informal conversations with stakeholders provided excellent feedback and guidance for the prioritization of future efforts. As planned, we successfully moved from the inform to the consult/involve level on the SIA Community Engagement Spectrum.
4. As you think about what guided your choices and prioritization efforts in this year of SIA implementation, what stands out? How will what you've learned this year impact future SIA implementation efforts?	Student emotional, behavioral, and academic support continued to be our top priorities, especially in light of lingering deficits caused by the COVID-19 pandemic. Our MTSS systems incorporated social and emotional learning this year, as well as expanded Tier 2 progress monitoring and student support. This work positively impacted our ability to make solid instruction decisions in effort to accelerate student learning and academic growth. Counseling and other behavioral and emotional support remained essential this year, allowing students to access and maintain within the learning environment. While there is much work to do and continued focus in these areas is necessary, it is clear that our efforts are starting to turn the tide in a positive direction for our students.



# YAMHILL CARLTON SCHOOL DISTRICT

120 N. Larch Place - Yamhill, OR 97148 | PH: 503-852-6980 - FX: 503-662-4931 | [www.ycsd.k12.or.us](http://www.ycsd.k12.or.us)

## Resolution 2024-06 Authorizations for Account Closure

### Yamhill Carlton High School

Whereas, the Board of Directors of Yamhill Carlton School District has authorized the closing of Yamhill Carlton School District, James W Robertson Scholarship, for the First Federal Bank Account ending in 2657.

Whereas, in May 2023 the Yamhill Carlton High School Associated Student Body approved the dissolution of the James W Robertson Scholarship that was established by Arther Hauser in honor of his son. The last scholarship awarded was in 2012-2013 and Mr. Hauser has since passed away. The recommendation was to move the funds to the ASPIRE mentor scholarship fund in the ASB accounts. Although the funds are tracked in the ASB funds, these funds reside in a separate bank account, which has \$5,619.65 as of September 30, 2023. The funds will be deposited in the Yamhill Carlton School District, Yamhill Carlton High School Student Body Account, Umpqua bank account ending in 6690 and posted to the ASPIRE mentor scholarship account.

The above resolution statements were approved and declared adopted on the 9<sup>th</sup> day of November 2023.

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Susan FitzGerald, Board Chair

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Clint Raever, Superintendent

RESOLUTION 2024-05

YAMHILL CARLTON SCHOOL DISTRICT  
RESOLUTION TO ADOPT SUPPLEMENTAL BUDGET AND  
INCREASE APPROPRIATIONS FOR 2023-2024 BUDGET

WHEREAS, a change in any fund's expenditures by more than 10 percent requires a Supplemental Budget.

Capital Projects Fund

A supplemental budget proposing a change in any fund's expenditures by more than 10 percent. This supplemental budget proposal increases resources and appropriations in the Capital Projects Fund from \$95,790 to \$1,500,000. A transfer from General Fund to the Capital Fund in June 2023 increased the beginning fund balance available that was not anticipated during the 23-24 budget process. The Construction Excise tax income has increased in late Spring of 2023 after the budget was approved due to increased permits and is expected to continue through the 23-24 fiscal year. This supplemental budget creates appropriation amounts to be able to complete needed capital projects for the Yamhill Carlton School District. The appropriations will not exceed actual resources received.

BE IT RESOLVED, that for the fiscal year beginning July 1, 2023, the budget shown below, with the change in appropriations, in order to provide proper budget authority as described above, are hereby appropriated as indicated within the fund listed:

**CAPITAL PROJECTS FUND**

<b><u>Resources</u></b>	<b><u>Adopted Budget</u></b>	<b><u>Supplemental Budget</u></b>	<b><u>Change in Budget</u></b>
Revenue from Local Sources	95,790	306,138	210,348
Interfund Transfers	0	450,000	450,000
Beginning Fund Balance	<u>0</u>	<u>743,862</u>	<u>743,862</u>
<b>Total Resources</b>	<b><u>\$ 95,790</u></b>	<b><u>\$ 1,500,000</u></b>	<b><u>\$ 1,404,210</u></b>

<b><u>Requirements</u></b>	<b><u>Adopted Budget</u></b>	<b><u>Supplemental Budget</u></b>	<b><u>Change in Budget</u></b>
Fiscal Services	0	10,000	10,000
Maintenance & Upkeep	18,540	100,000	81,460
Facilities Acquisition and Construction	<u>77,250</u>	<u>1,390,000</u>	<u>1,312,750</u>
<b>Total Requirements</b>	<b><u>\$ 95,790</u></b>	<b><u>\$ 1,500,000</u></b>	<b><u>\$ 1,404,210</u></b>

ADOPTED by the Board of Directors of the Yamhill Carlton School District this 9<sup>th</sup> day of November 2023.

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Susan FitzGerald, Chair

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Clint Raever, Superintendent

### *Mission*

*The Yamhill-Carlton School District champions the growth of its students. Our students recognize their individual strengths and talents, overcome their challenges, grow past proficiency, and succeed in their aspirations so each may contribute positively to a local and global society.*



To: Board of Directors – Yamhill Carlton School District  
Clint Raever, Superintendent

From: Tami Zigler, Director of Fiscal Services

Date: November 9, 2023

Re: ESSER III Capital Expenditure Approval – Intercom Wiring Project

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### **Background Information**

The Elementary and Secondary School Emergency Relief Fund III (ESSER III) was established by the CARES and CRRSA Acts to assist school districts with addressing the impacts of COVID-19. The Oregon Department of Education requires pre-approval for all capital expenditure requests that will use the ESSER III funds. In addition, the local School Board approval is required on any capital expenditure items/projects over \$25,000.

The Superintendent, District administration from the High School and Intermediate School, and the facilities manager, Ian Barr, identified the need for updated wiring after installing our new intercom system for the High School and Intermediate School. While the equipment was replaced in 2022-23, the wiring is very old, which causes extreme clarity issues.

We have received a quote in the amount of \$67,120.00.

### **Recommendation**

I am recommending that the Yamhill Carlton School Board approves this project out of the ESSER III funds as a capital expenditure, so that we can apply to the Oregon Department of Education for approval. Once approval is received in full, Yamhill Carlton will work with the selected vendor to install new wiring for the intercom system.

### *Mission*

*The Yamhill-Carlton School District champions the growth of its students. Our students recognize their individual strengths and talents, overcome their challenges, grow past proficiency, and succeed in their aspirations so each may contribute positively to a local and global society.*



To: Board of Directors – Yamhill Carlton School District  
Clint Raever, Superintendent

From: Tami Zigler, Director of Fiscal Services

Date: November 9, 2023

Re: ESSER III Capital Expenditure Approval – Intercom Installation YCES

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### **Background Information**

The Elementary and Secondary School Emergency Relief Fund III (ESSER III) was established by the CARES and CRRSA Acts to assist school districts with addressing the impacts of COVID-19. The Oregon Department of Education requires pre-approval for all capital expenditure requests that will use the ESSER III funds. In addition, the local School Board approval is required on any capital expenditure items/projects over \$25,000.

The Superintendent, District administration from the Elementary School, and the facilities manager, Ian Barr, identified the need for an updated intercom system and new wiring. Along with this, a need was identified for a lock down system that would integrate with the intercom system.

We have received a quote in the amount of \$62,850.

### **Recommendation**

I am recommending that the Yamhill Carlton School Board approves this project out of the ESSER III funds as a capital expenditure, so that we can apply to the Oregon Department of Education for approval. Once approval is received in full, Yamhill Carlton will work with the selected vendor to install the new intercom system, wiring and lock down system for Yamhill Carlton Elementary School.