



YAMHILL CARLTON SCHOOL DISTRICT

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

BOARD OF DIRECTORS REGULAR SESSION AGENDA

LOCATION;120 N LARCH PL. YAMHILL OR 97148

Or VIA ZOOM <https://zoom.us/j/91341315065?pwd=WEVMZmhoSmkxdE8zcGFqZ3BsQnh5UT09>
Password: sW66uH

Wednesday, February 8, 2023

Regular Session: 6:00pm

AGENDA

- I. **Call to Order Regular Session**
- II. **Flag Salute**
- III. **Individuals, Delegations, Recognitions, and Communications**
 - A. YCHS Student body Representative – Verbal Report
 - B. YCHS – Scott Henderson & Brad Post – Verbal Report
 - C. YCIS – Matt Wiles & Chad Tollefson – Student Spot Light
 - D. YCES – Amanda Dallas – Verbal Report
 - E. Alliance Academy – John Horne – 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 vertner@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.

- IV. **Review of Agenda (Action Item)**
- V. **Regular Session- Consent Agenda (Action Item)**
 - A. Approval of Board of Directors minutes
 1. Regular meeting January 12, 2023
 2. Work Session – January 17, 2023
 - B. Personnel
 - C. Enrollment
 - D. Donations
 - E. Surplus
- VI. **Announcements and Reports**
 - A. Superintendent’s Report – Clint Raever – Verbal Report
 - B. District Facilities Report- Ian Barr – Verbal Report
 - C. Financials & List of Bills for January 2023 – Tami Zigler (Action Item)

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VII. New Business

- A. Out of State Travel for YCHS Softball team. *(Action Item)*
- B. Approval of the 2023-2024 School Calendar *(Action Item)*
- C. Approval of Procurement Procedures for the Child Nutrition Programs *(Action Item)*
- D. Resolution 2023-02: Willamette Education Service District 2023-2025 Local Service Plan *(Action Item)*
- E. Notice of Intent to Award Contract for Facilities Assessment & Long-Range Plan *(Action Item)*
- F. Verizon Cell Tower - Proposal to amend current lease agreement. *(Possible Action Item)*
- G. Superintendent Evaluation Process, timeline and tool for 22-23 School year *(Action Item)*
- H. Adopt Updated Policies *(Action Item)*
 - 1. Criminal Records Checks & Fingerprinting *(GCDA/GDDA-AR)*
 - 2. Academic Achievement *(IK)*
 - 3. Graduation Requirements *(IKF)*
 - 4. Use of Restraint or Seclusion *(JGAB)*

VIII. Board of Directors Comments

IX. Adjournment

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Password: sW66uH

School Board Members in Attendance: Susan FitzGerald, Jami Eglund, Ken Watson, Erin Galyean, JaJetta Dumdi
District members in attendance: Clint Raever, Tami Zigler, Scott Henderson, Chad Tollefson, Matt Wiles, Erin Sunday, Renee McKinney, Megan Huxman, Beth Patt-Mckinney, Cheyenne McNeely, Fallan Hepp, Kaylani Cruz
Morgan Bishop, Dustin Rhodes, Merceded McLeod & Kelly Vanhorn
Community members & Students in attendance: Dorothy Adair, Mikayla Staebler, Nate Shanafelt & Kristen Westerlund

Thursday, January 12, 2023

Regular Session: 6:00pm

Minutes

- I. Call to Order Regular Session**
- II. Flag Salute**
- III. Individuals, Delegations, Recognitions, and Communications**
 - A. Audit Report Presented by Tara Kamp, Pauly Rogers and Co PC**
 - Purpose of audit is to ensure that we are meeting Oregon minimum standards. We have received an “unmodified opinion” which is a clean audit
 - B. YCHS Student body Representative – Verbal Report**
 - Dorothy Adair presented video from YCHS Leadership class, thanking the school board for all of their hard work and dedication.
 - Winter formal has been moved from January 21, 2023 to a future date in February. More information to come.
 - C. YCES – Amanda Dallas – Verbal Report**
 - Custodians have been hired!!! They are off and running and the school is looking amazing!
 - YCES will be having benchmark testing in Dibels & Math Intervention this month. Hoping to share progress next month.
 - Shout out to our amazing board for all of their support and dedication.
 - Red students receive 45 mins, Yellow students receive 22-30 minutes and green students receive 15 minutes of
 - D. YCIS – Matt Wiles & Chad Tollefson – Verbal Report**
 - Shout out to the board for their Dedication to YC.
 - January is a Pivotal month for YCIS. Gives the ability to reassess IReady & Dibels. Should have some test results to share at the next board meeting.

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- After 3 years the Science fair will be back in person this year! The science fair will be held in the CTE dome on February 2, 2023.
- Shout out to Karissa Peterson. She took over Dibbles Testing and is doing an amazing job.

E. YCHS – Scott Henderson & Brad Post – Verbal Report

Scott:

- Shout out to the board for their Dedication to YC.
- As of January 11, 2023 YCHS, has built their first MTSS team. The team will go to Tigard to watch their MTSS team in action.
- Shout outs to Rachel Henry and Robin Culver for all of their hard work. Rachel working hard with seniors who are only missing their senior project to graduate and Robin for working on scheduling and helping to get the MTSS team together.

Brad:

- Sports are doing well. Basketball is traveling to Corbett for their 2nd league game after their win against Warrenton.
- Basketball numbers are high. Enough students to make 3 teams for both the girls and boys.
- Cheer is prepping for their competition this coming weekend.
- Wrestling is off to Redmond this weekend for a tournament.
- This year we have 7 girls that have joined our wrestling team. Excited to see this program grow.

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Cheyenne McNeely:

- Joined by fellow teachers wanted to show support to the teacher's union as the union and the district will be moving to mediation next week. Hoping the union and district will be able to reach a middle ground that works and everyone's favor.

IV. Review of Agenda (Action Item)

E. Galyean motioned to approve the amended agenda as presented. K. Watson seconded. All in favor. Motion passes

V. Regular Session- Consent Agenda (Action Item)

A. Approval of Board of Directors minutes

1. Work & Regular meeting December 08, 2022

B. Personnel

C. Enrollment

D. Donations

J. Egland motioned to approve the consent agenda as presented. E. Galyean seconded. All in favor. Motion passes.

VI. Announcements and Reports

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

- Oregon Paid Leave act in effect. YC going to go with American Fidelity's plan.
- YCHS football Stadium is considered not safe for use due to major rot per the Engineer.

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- Stadium could potentially cost \$1.2 million for complete replacement or \$100,000 to make it useable.
- Graduation will not be able to take place on the football field this year. Class of 2023 has been notified.
- Possible portable bleachers will be used for the 2023 football season if stadium is not useable.

B. District Facilities Report –Clint Raever -Verbal Report

- Happy to report that the maintenance/ custodial department is fully staffed at this time.
- Ian is doing an amazing job of taking issues head on and building a strong team.
- Currently dealing with water pooling issues around the campuses.
- Met with baseball coach to go over the improvements needed to the baseball field.

C. Financials & List of Bills for December 2022 – Tami Zigler (Action Item)

E. Galyean motioned to accept the Financials & List of Bills for December 2022 as presented. J. Dumdi seconded. All in favor. Motion passes

VII. New Business

A. Approval of Audited Financials for Fiscal Year Ending 2022 (Action Item)

K. Watson motioned to Approve the Audited Financials for Fiscal Year Ending 2022 as presented. J. Eglund seconded. All in favor. Motion passes

B. 1st Read of Policies

- 1. Academic Achievement (IK)**
- 2. Graduation Requirements (IKF)**
- 3. Use of Restraint or Seclusion (JGAB)**

C. Adopt Updated Policies (Action Item)

1. Interscholastic Activities (IGDJ)

E. Galyean motioned to adopt the updated policies listed in section C, Items 1 as presented. J. Eglund seconded. All in Favor. Motion passes.

2. Criminal Records Checks & Fingerprinting (GCDA/GDDA-AR)

E. Galyean motioned to postpone the approval of the updated Criminal Records Checks & Fingerprinting (GCDA/GDDA-AR) until the February board meeting. K. Watson Seconded. All in favor. Motion to postpone passes.

D. Approval of cost Proposal for the stadium.

E. Galyean motioned to approve the cost Proposal for the stadium as presented. K. Watson seconded. All in favor, Motion passes.

VIII. Board of Directors Comments

IX. Adjournment

S. FitzGerald adjourned meeting @ 7:45pm

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BOARD OF DIRECTORS WORK SESSION MINUTES

LOCATION;120 N LARCH PL. YAMHILL OR 97148

Or VIA ZOOM <https://zoom.us/j/91341315065?pwd=WEVMZmhoSmkxdE8zcGFqZ3BsQnh5UT09>
Password: sW66uH

School Board Members in Attendance: Susan FitzGerald, Jami Eglund, Ken Watson, Erin Galyean, JaJetta Dumdi

District members in attendance: Clint Raever & Tina Vertner

OSBA Rep: Janet Avila-Medina

Tuesday, January 17, 2023

Work Session: 5:00pm

MINUTES

I. Call to Order Work Session

II. Flag Salute

III. Welcome Back/ Review

IV. DEMSP Session #3 Board Training

- Superintendent Evaluation Process Overview & Discussion
- Board Goals/Commitments
- Board Professional Development Plan Discussion
- Board Operating Agreement Review
 - Board felt this was an area that was covered and not needing to spend extra time on.
 - Board will approve of Superintendent Evaluation timelines and process during open session on Feb 8, 2023.
 - Board will discuss working with OSBA on Targeted group survey.

V.

Discussion to Identify District Leadership Team (DLT)

- Clint will gather a list of community members and staff to reach out to and invite to be apart of the District Leadership Team.

VI. Next Steps

- DEMSP Session #4: Feb. 23rd – board project session with DLT

VII. Resources

- Get on Board Campaign
- Bonds & local option elections

VIII. Adjournment

S. Fitzgerald adjourned meeting at 8:00pm

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Yamhill Carlton School District
Human Resources
Board Report
February 08, 2023



New Hires

Resign/Retire/Term Employees

Mel Sauers , LRC IA

Teresa Brey, YCHS IA

Current Employees: Position Changes

Currently Open Positions

YCHS LRC IA

YCIS 8th Grade Language Arts Teacher

YCHS Alt Ed IA

Yamhill Carlton School District Enrollment Report

January

2023

District Enrollment for 2022-23 School Year

	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
YCES	301	297	299	299	297	-	-	-	-	-
YCIS	332	329	330	325	322	-	-	-	-	-
YCHS	293	290	288	284	290	-	-	-	-	-
Alliance	192	194	191	190	189	-	-	-	-	-
Total	1,118	1,110	1,108	1,098	1,098	-	-	-	-	-

YCES Enrollment for 2022-23 School Year

	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
Kindergarten	73	71	72	72	70	-	-	-	-	-
1st Grade	66	65	65	65	66	-	-	-	-	-
2nd Grade	73	72	71	71	71	-	-	-	-	-
3rd Grade	89	89	91	91	90	-	-	-	-	-
22/23 Total	301	297	299	299	297	-	-	-	-	-
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
18/19 Total	336	337	337	337	332	332	330	332	332	331

YCIS Enrollment for 2022-23 School Year

	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
4th Grade	57	57	55	55	54	-	-	-	-	-
5th Grade	66	66	65	64	64	-	-	-	-	-
6th Grade	75	75	78	76	75	-	-	-	-	-
7th Grade	70	70	70	68	69	-	-	-	-	-
8th Grade	64	61	62	62	60	-	-	-	-	-
22/23 Total	332	329	330	325	322	-	-	-	-	-
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
18/19 Total	325	310	312	310	310	305	304	305	304	303

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

YCHS Enrollment for 2022-23 School Year

	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
9th Grade	74	75	76	75	77	-	-	-	-	-
10th Grade	77	75	74	74	77	-	-	-	-	-
11th Grade	73	71	70	67	69	-	-	-	-	-
12th Grade	69	69	68	68	67	-	-	-	-	-
Transition	-	-	-	-	-	-	-	-	-	-
22/23 Total	293	290	288	284	290	-	-	-	-	-
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
18/19 Total	277	277	279	281	278	281	279	274	275	261

Alliance Academy Enrollment 2022-23

	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
Kindergarten	16	16	16	16	18	-	-	-	-	-
1st Grade	27	27	27	27	27	-	-	-	-	-
2nd Grade	25	25	25	25	25	-	-	-	-	-
3rd Grade	21	21	21	21	21	-	-	-	-	-
4th Grade	25	26	24	23	23	-	-	-	-	-
5th Grade	23	23	23	23	23	-	-	-	-	-
6th Grade	21	21	21	21	20	-	-	-	-	-
7th Grade	12	13	13	13	13	-	-	-	-	-
8th Grade	8	8	8	8	9	-	-	-	-	-
9th Grade	4	3	3	3	2	-	-	-	-	-
10th Grade	5	5	5	4	3	-	-	-	-	-
11th Grade	5	6	5	6	5	-	-	-	-	-
12th Grade	-	-	-	-	-	-	-	-	-	-
22/23 Total	192	194	191	190	189	-	-	-	-	-
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
18/19 Total	88	89	94	94	99	105	106	106	103	103

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

January Donations:

Donation received from:	Amount	To
The Education Foundation / James Family	\$1,000.00	YCIS- Bubble Wall for Life Skills Classroom



February 2023 Surplus:

Maintenance Department

- Rotovac 360i model # 5,517,715
- Cub Cadet snow blower 30" 357cc
- 20 Winx air movers
- 6 Restor air movers
- Kubota ZD28 50" mower (needs engine rebuilt)
- Single man lift
- Diesel pump FE Petro Inc. w 400651
- 2 Pryco fuel systems
- 300 CMU landscape block
- Powermatic lathe
- Miller Syncrowave 250 welder
- Wood lathe
- Delta rockwell tablesaw
- Solberga drill press
- 10" radial arm saw
- 10" Grizzly tablesaw #G0493

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: February 8, 2023

Re: District Financial Report

SUMMARY for Fiscal Year 2022-2023

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

For the current period, total revenue was \$134,535 more than planned and total expenditures were \$471,083 less than planned. The combined result is a \$605,618 favorable surplus condition for the current year period.

REVENUES

TAXES: Taxes are \$57,242 over plan. This favorable condition represents 1.5% of the year-to-date plan amount of \$3,771,756. This variance amount is considered tolerable, and was primarily driven by an increase in 1111 CURRENT YEAR TAXES. For the current year period, Taxes increased 7.5% over the prior year period compared to an average increase of 6.2% over the preceding 4 years.

TUITION, FEES, OTHER: Tuition, Fees, Other is \$16,011 under plan. This unfavorable condition represents -21.1% of the year-to-date plan amount of \$76,018. This variance amount is considered material, and was primarily driven by a decrease in 1990 MISCELLANEOUS. This decrease was partially offset by an increase in 1740 STUDENT FEES (LOCKER, TOWEL, EQUIPMENT). For the current year period, Tuition, Fees, Other decreased 34.9% over the prior year period compared to an average increase of 4.2% over the preceding 4 years.

EARNINGS ON INVESTMENTS: Earnings on Investments are \$56,042 over plan. This favorable condition represents 425.8% of the year-to-date plan amount of \$13,160. This 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 592.9% over the prior year period compared to an average decrease of 16.5% over the preceding 4 years.

INTERMEDIATE REVENUE: Intermediate Revenue is \$257 over plan. This favorable condition represents 0.3% of the year-to-date plan amount of \$93,750. This variance amount is considered trivial and meets expectations based on budget appropriations. For the current year period, Intermediate Revenue increased 130.0% over the prior year period compared to an average decrease of 4.9% over the preceding 4 years.

STATE UNRESTRICTED AID AND SSF: State Unrestricted Aid and SSF is \$37,006 over plan. This favorable condition represents 0.8% of the year-to-date plan amount of \$4,715,496. The current year variance amount is considered tolerable, 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 6.5% over the prior year period compared to an average increase of 0.8% over the preceding 4 years.

EXPENDITURES

SALARIES: Salaries are \$70,441 under plan. This favorable condition represents -2.7% of the year-to-date plan amount of \$2,629,056. This variance amount is considered tolerable, and was primarily driven by decreases in 0111 LICENSED SALARIES, 0112 CLASSIFIED SALARIES, and 0130 ADDITIONAL SALARY. For the current year period, Salaries increased 7.2% over the prior year period compared to an average increase of 1.5% over the preceding 4 years.

ASSOCIATED PAYROLL COSTS: Associated Payroll Costs are \$112,853 under plan. This favorable condition represents -7.8% of the year-to-date plan amount of \$1,444,306. This variance amount is considered tolerable, and was primarily driven by a decrease in 0241 EMPLOYEES INSURANCE. For the current year period, Associated Payroll Costs increased 6.5% over the prior year period compared to an average increase of 3.2% over the preceding 4 years.

PURCHASED SERVICES: Purchased Services are \$272,522 under plan. This favorable condition represents -21.9% of the year-to-date plan amount of \$1,243,121. The current year variance amount is considered material, and was primarily driven by decreases in 0310 INSTR, PROF & TECH SRVS, and 0311 SUBSTITUTE SERVICES. For the current year period, Purchased Services increased 0.4% over the prior year period compared to an average decrease of 1.3% over the preceding 4 years. The largest Purchased Services groups - 0331 REIMBURSABLE STUDENT TRANSPORTATION, 0310 INSTR, PROF & TECH SRVS, 0325 ELECTRICITY, 0326 FUEL, and 0311 SUBSTITUTE SERVICES, representing 76.1% of total Purchased Services, increased by 1.2%.

SUPPLIES: Supplies are \$129,523 under plan. This favorable condition represents -28.2% of the year-to-date plan amount of \$459,823. This amount is considered material, and was primarily driven by a decrease in 0420 TEXTBOOKS. For the current year period, Supplies increased 63.3% over the prior year period compared to an average decrease of 3.2% over the preceding 4 years.

CAPITAL OUTLAY: Capital Outlay is \$47,026 under plan. This favorable condition represents -39.6% of the year-to-date plan amount of \$118,842. The current year variance amount is considered material, and was primarily driven by a decrease in 0550 TECHNOLOGY. For the current year period, Capital Outlay decreased 10.4% over the prior year period. The largest Capital Outlay group - 0541 INITIAL & ADDITIONAL EQUIPMENT PURCHASE, representing 91.4% of total Capital Outlay, increased by 741.2%.

OTHER OBJECTS: Other Objects are \$3,391 under plan. This favorable condition represents -1.4% of the year-to-date plan amount of \$237,084. This variance amount is considered trivial and meets expectations based on budget appropriations. For the current year period, Other Objects increased 5.4% over the prior year period compared to an average decrease of 2.8% over the preceding 4 years.

TRANSFERS: Transfers are \$164,675 over plan. This unfavorable condition represents 127.7% of the year-to-date plan amount of \$128,942. This variance 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 6.7% over the prior year period compared to an average decrease of 7.6% over the preceding 4 years. The largest Transfers groups - 0791 TRANSFER TO BUILDING FUND, and 0790 OTHER TRANSFERS, representing 81.3% of total Transfers, decreased by 0.4%.

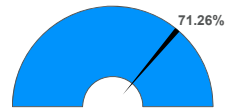
OTHER USES OF FUNDS: Other Uses of Funds are on plan. This amount is considered trivial and meets expectations based on budget appropriations.

Information provided by Frontline Analytics powered by Forecast5.

100 GENERAL FUND Revenue Dashboard Summary

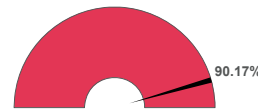
For the Period Ending January 31, 2023

Actual YTD Revenues



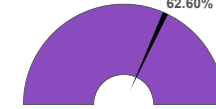
Projected YTD Revenues
70.17%

Actual YTD Local Sources



Projected YTD Local Sources
87.95%

Actual YTD State Sources



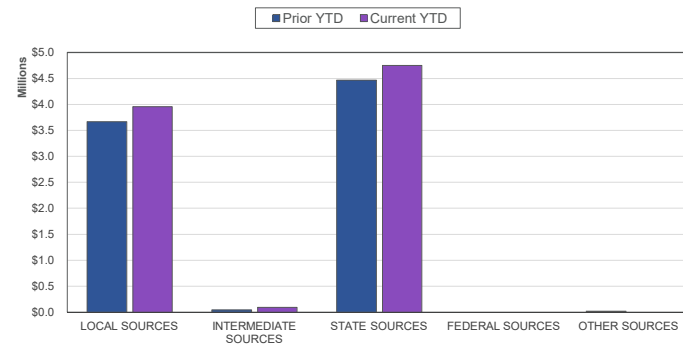
Projected YTD State Sources
62.11%

General Fund Revenues

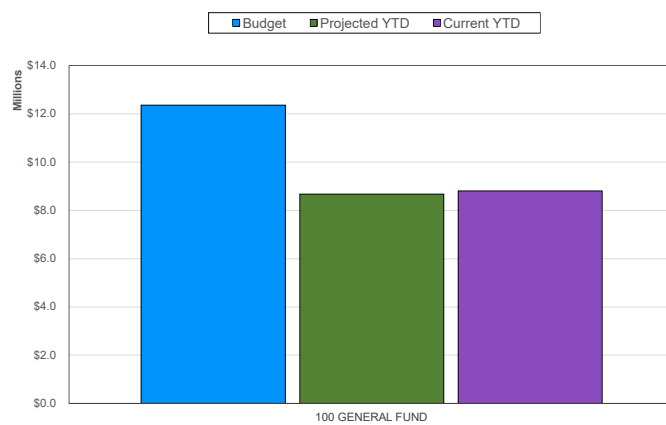
Top 10 GENERAL FUND Sources of Revenue (Year-to-Date)

State School Fund	\$4,752,502
Ad Valorem Taxes Levied By District	\$3,822,773
Resources - Beginning Fund Balance	\$2,229,182
Unrestricted Revenue	\$93,750
Interest On Investments	\$69,202
Miscellaneous	\$38,346
Fees	\$18,775
Penalties And Interest On Taxes	\$6,225
Rentals	\$1,740
Fees Charged To Grants	\$1,146
Percent of Total Revenues Year-to-Date	100.00%

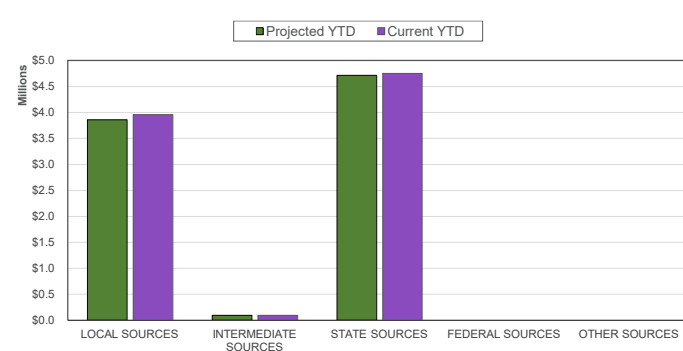
GENERAL FUND Revenue by Source | Prior YTD vs. Current YTD



Revenues by Fund | Budget / Projected YTD / Current YTD



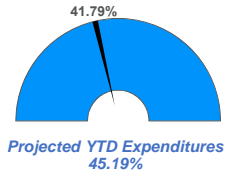
GENERAL FUND Revenue by Source | Projected YTD vs. Current YTD



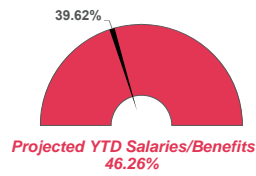
100 GENERAL FUND Expense Dashboard Summary

For the Period Ending January 31, 2023

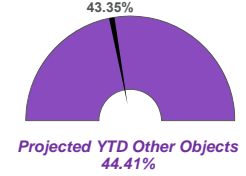
Actual YTD Expenditures



Actual YTD Salaries/Benefits

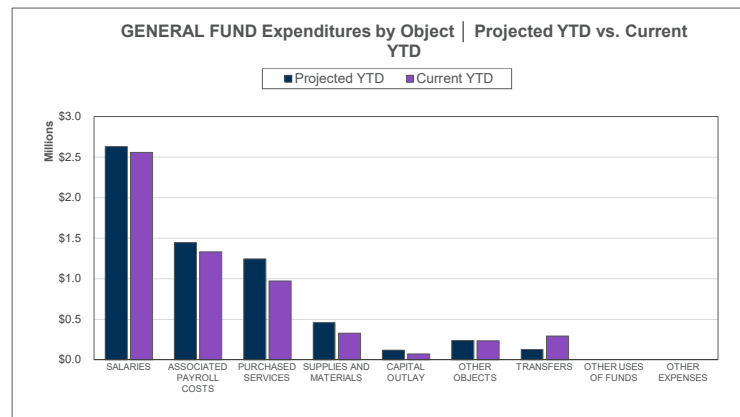
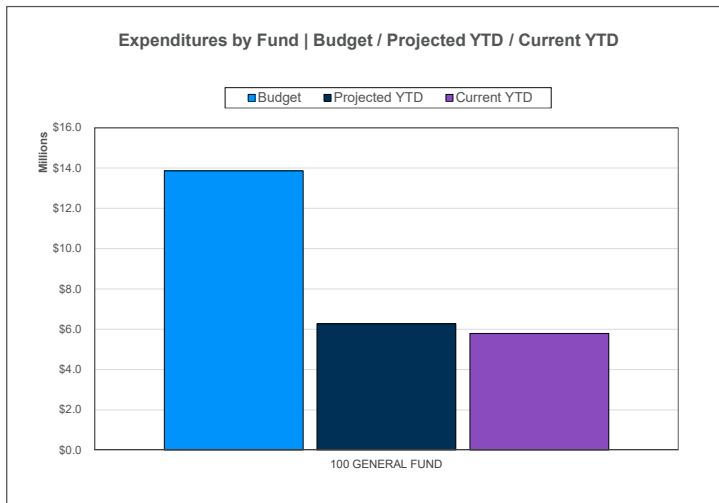
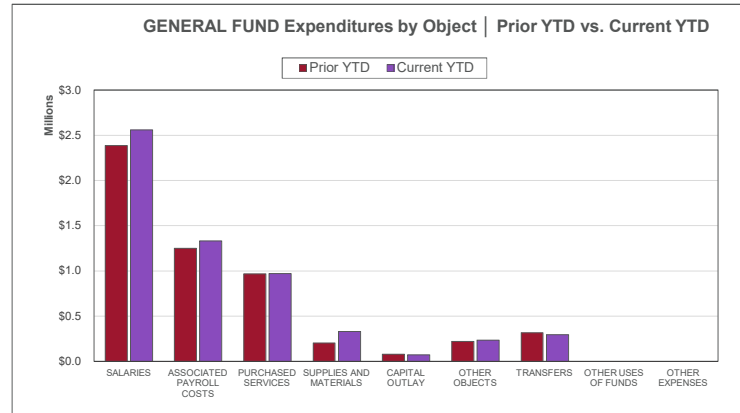


Actual YTD Other Objects



General Fund Expenditures

Top 10 GENERAL FUND Expenditures by Program (Year-to-Date)	
Licensed Salaries	\$1,224,522
Classified Salaries	\$573,327
Employees Insurance	\$523,683
Pers Ual Contribution	\$445,024
Administrators	\$402,679
Reimbursable Student Transportation	\$326,652
Fica/Medicare	\$190,953
Property Insurance Premiums	\$176,851
Instr, Prof & Tech Srvs	\$168,095
Textbooks	\$165,604
Percent of Total Expenditures Year-to-Date	72.49%

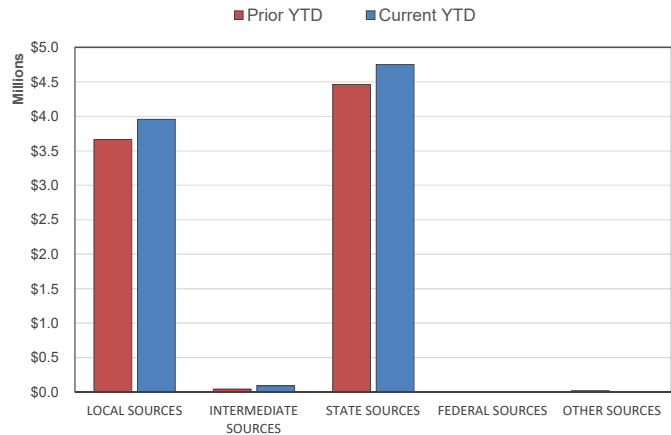


100 GENERAL FUND | Financial Summary by Object

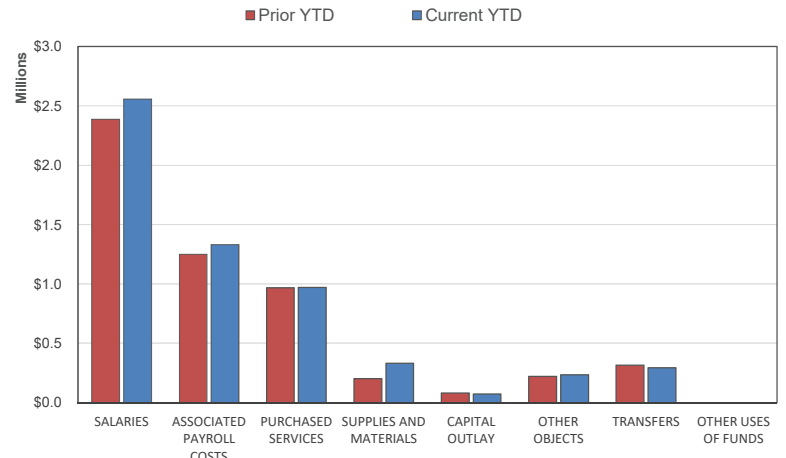
For the Period Ending January 31, 2023

	Prior YTD		Prior Year Actual		YTD % of PY Actual		Current YTD		Annual Budget		YTD % of Budget	
	\$		\$				\$		\$			
Beginning Fund Balance	\$	1,899,600	\$	1,899,600			\$	2,229,182	\$	1,500,000		
REVENUES												
Local Sources		3,664,802		4,092,569		89.55%		3,958,208		4,389,725		90.17%
Intermediate Sources		40,879		166,694		24.52%		94,007		375,000		25.07%
State Sources		4,464,377		7,164,071		62.32%		4,752,502		7,591,710		62.60%
Federal Sources		-		-		-		-		-		-
Other Sources		17,273		17,273		100.00%		-		-		-
TOTAL REVENUE	\$	8,187,331	\$	11,440,607		71.56%	\$	8,804,716	\$	12,356,435		71.26%
EXPENDITURES												
Salaries	\$	2,387,043	\$	5,155,869		46.30%	\$	2,558,615	\$	5,726,471		44.68%
Associated Payroll Costs		1,250,729		2,780,466		44.98%		1,331,453		3,365,472		39.56%
Purchased Services		967,112		1,985,625		48.71%		970,599		2,444,433		39.71%
Supplies and Materials		202,240		289,972		69.74%		330,299		607,234		54.39%
Capital Outlay		80,125		101,283		79.11%		71,816		137,400		52.27%
Other Objects		221,813		225,729		98.27%		233,692		240,750		97.07%
Transfers		314,579		514,579		61.13%		293,617		313,617		93.62%
Other Uses of Funds		-		-		-		-		1,021,058		0.00%
Other Expenses		-		-		-		-		-		-
TOTAL EXPENDITURES	\$	5,423,641	\$	11,053,523		49.07%	\$	5,790,091	\$	13,856,435		41.79%
SURPLUS / (DEFICIT)	\$	2,763,690	\$	387,084			\$	3,014,625	\$	(1,500,000)		
ENDING FUND BALANCE	\$	4,663,290	\$	2,286,684			\$	5,243,807	\$	-		

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 2022-2023
AS OF JANUARY 31, 2023**

FUND DESCRIPTION	GRANT AWARD	REVENUE	EXPENDITURE	ENCUMBRANCE	BUDGET BALANCE
201 TITLE I	135,635.82	2,187.82	57,129.53	77,000.98	1,505.31
204 TITLE II-A & TITLE IV-D	10,763.00	-	-	-	10,763.00
206 IDEA PART B 611	170,133.00	20,409.16	57,960.60	65,619.43	46,552.97
207 IDEA PART B 619	-	1,746.64	-	-	-
212 ESSER II FUNDS	127,051.31	-	91,222.21	11,894.04	23,935.06
213 ESSER III FUNDS	636,799.63	-	262,103.35	93,285.63	281,410.65
214 SUMMER LEARNING GRANTS - 2022 K-8	51,770.84	51,770.84	51,770.84	-	-
214 SUMMER LEARNING GRANTS - 2022 9-12	16,566.13	16,566.13	16,566.13	-	-
215 MEDICAID ADMIN CLAIMING (MAC)	10,000.00	1,527.92	-	-	10,000.00
218 ORTII	3,326.64	3,326.64	3,326.64	-	-
228 YCCO - KINDERGARTEN TRANSITION	-	-	-	-	-
231 FUEL UP TO PLAY 60	771.40	771.40	-	-	771.40
233 HIGH SCHOOL SUCCESS (M-98)	237,912.42	61,835.21	99,078.88	124,720.31	14,113.23
235 CTE REVITALIZATION FUNDS	30,000.00	29,596.74	-	-	30,000.00
238 CAREER PATHWAYS	8,120.27	-	-	-	8,120.27
239 OUTDOOR SCHOOL (M-99)	69,976.00	-	-	-	69,976.00
241 ESSA SUPPORT	45,521.00	2,937.50	16,705.41	24,091.69	4,723.90
251 STUDENT INVESTMENT ACCOUNT (SIA)	788,749.23	409,479.59	322,738.32	354,385.29	111,625.62
259 RECRUITMENT & RETENTION GRANT	129,866.73	110,385.00	83,389.74	-	46,476.99
261 TAP GRANTS - FACILITIES ASSESSMENT	20,000.00	-	-	-	20,000.00
261 TAP GRANTS - LONG RANGE PLANNING	25,000.00	-	-	-	25,000.00
261 TAP GRANTS - AHERA	25,000.00	-	8,500.00	13,000.00	3,500.00
261 TAP GRANTS - LEAD TESTING	5,880.00	-	4,825.00	1,055.00	-
LOCAL/STATE/FED GRANTS	2,548,843.42	712,540.59	1,075,316.65	765,052.37	708,474.40
230 MISCELLANEOUS GRANTS	GRANT AWARD	REVENUE	EXPENDITURE	ENCUMBRANCE	GRANT BALANCE
000 MISCELLANEOUS GRANTS	1,500.00	822.08	-	3,934.01	(2,434.01)
401 ASPIRE	2,500.00	-	1,127.64	1,127.65	244.71
801 YCES PTO PROJECTS	2,000.00	-	-	2,000.00	-
802 AG DRONE PROJECT	1,474.57	1,474.57	-	-	1,474.57
803 VETERANS LEGACY GRANT	785.03	785.03	-	-	785.03
806 SOPHIA'S FUND	1,000.00	1,000.00	-	499.99	500.01
808 MWEC CONFERENCES	1,634.31	-	975.28	-	659.03
809 STUDENT TEACHING	1,705.02	2,405.02	956.42	-	748.60
814 FTC ROBOTICS DONATION	1,274.00	1,274.00	-	-	1,274.00
821 OSCU ROCKETRY GRANT	16.17	16.17	-	-	16.17
824 EIIS GRANT	3,055.00	-	-	-	3,055.00
825 MENSTRUAL DIGNITY ACT	4,676.22	-	-	-	4,676.22
SUB TOTAL MISC GRANTS	21,620.32	7,776.87	3,059.34	7,561.65	10,999.33
FUND OTHER SPECIAL REVENUE	BUDGET	REVENUE	EXPENDITURE	ENCUMBRANCE	BUDGET BALANCE
250 FOOD SERVICE	444,252.00	197,967.21	157,568.77	261,510.85	25,172.38
265 EARLY RETIREMENT	81,000.00	90,033.81	9,800.00	17,000.00	54,200.00
266 PROFESSIONAL DEVELOPMENT	60,000.00	65,273.01	9,997.00	12,730.00	37,273.00
280 STUDENT BODY ACCOUNTS	-	-	-	-	-
281 STUDENT BODY ACCOUNTS - YCES	30,000.00	-	-	-	30,000.00
282 STUDENT BODY ACCOUNTS - YCIS	170,000.00	80,024.20	-	8,105.04	161,894.96
283 STUDENT BODY ACCOUNTS - YCHS	315,000.00	260,211.28	73,847.45	11,564.51	229,588.04
SUB TOTAL OTHER SPECIAL REVENUE	1,100,252.00	693,509.51	251,213.22	310,910.40	538,128.38
TOTAL ALL 200 FUNDS	3,670,715.74	1,413,826.97	1,329,589.21	1,083,524.42	1,257,602.11

*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 2022-2023
DEBT SERVICES, CAPITAL PROJECT, AND FIDUCIARY FUNDS
AS OF JANUARY 31, 2023**

FUND DESCRIPTION	BEGINNING FUND					PROJECTED	CASH BALANCE
	BUDGET	BALANCE	REVENUE	EXPENDITURE	ENCUMBRANCE	BALANCE*	
300 GENERAL OBLIGATION DEBT	966,350.00	104,498.93	912,451.63	237,872.74	728,477.26	-	779,077.82
301 QZAB DEBT	143,517.00	3,496.85	126,689.62	143,514.57	-	2.43	(13,328.10)
302 PERS UAL DEBT	1,861,684.00	556,602.20	551,203.75	140,686.00	1,005,686.00	715,312.00	967,119.95
304 JCI PROJECT DEBT	121,100.00	18,600.43	121,291.68	121,100.00	-	-	18,792.11
TOTAL DEBT SERVICES	3,092,651.00	683,198.41	1,711,636.68	643,173.31	1,734,163.26	715,314.43	1,751,661.78

FUND DESCRIPTION	BEGINNING FUND					PROJECTED	CASH BALANCE
	BUDGET	BALANCE	REVENUE	EXPENDITURE	ENCUMBRANCE	BALANCE*	
400 CET CAPITAL PROJECTS	75,000.00	55,378.79	87,936.34	5,164.85	26,840.00	42,995.15	138,150.28
410 SEISMIC REHABILITATION GRANT	1,115,772.29	-	1,115,772.29	1,115,772.29	-	-	-
475 CAPITAL PROJECT FUND	18,000.00	18,487.92	10,974.94	-	-	18,000.00	29,462.86
TOTAL CAPITAL PROJECTS	1,208,772.29	73,866.71	1,214,683.57	1,120,937.14	26,840.00	60,995.15	167,613.14

FUND DESCRIPTION	BEGINNING FUND					PROJECTED	CASH BALANCE
	BUDGET	BALANCE	REVENUE	EXPENDITURE	ENCUMBRANCE	BALANCE*	
785 LAUGHLIN SCHOLARSHIP FUND	49,000.00	51,827.47	2,429.09	-	-	49,000.00	54,256.56
TOTAL TRUST IN AGENCY	49,000.00	51,827.47	2,429.09	-	-	49,000.00	54,256.56
TOTAL OTHER FUNDS	4,350,423.29	808,892.59	2,928,749.34	1,764,110.45	1,761,003.26	825,309.58	1,973,531.48

**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: 2022-2023

Criteria: **From Check Date:** 01/01/2023 **To:** 01/31/2023 **Voucher:** ALL
Report Sort: FUND **From Fund:** 100 **To:** 900

Page Break

Exclude Invoice Description

Check Number	Vendor	Amount
100 - GENERAL FUND		
0	AMANDA GREENE	\$272.00
0	AMAZON CAPITAL SERVICES	\$4,073.57
0	AMY LYNN LONG	\$37.01
60381	BRIGHTSIDE ELECTRIC AND	\$1,449.22
60389	BRIGHTSIDE ELECTRIC AND	\$1,658.82
60411	BRIGHTSIDE ELECTRIC AND	\$813.00
60427	BRIGHTSIDE ELECTRIC AND	\$650.00
0	BRIHANA NEE	\$165.64
0	CATHERINE WEAVER	\$564.00
0	CDW-GOVERNMENT, INC	\$824.25
0	CENTURY LINK	\$388.20
0	CICORIA, ANTHONY W	\$99.99
60382	CITY OF CARLTON	\$1,644.37
60390	CITY OF YAMHILL	\$3,909.39
60429	COMCAST NETWORK SERVICES	\$266.58
60412	COSA	\$295.00
60430	COSA	\$544.00
0	DANNA JOHNSON	\$44.93
60383	DAVISON AUTO PARTS	\$15.07
0	DELL INC	\$112.98
0	ELIZABETH RIBERA	\$245.50
0	ESS WEST LLC	\$10,552.15
0	FOLEY, ANNE MICHELLE	\$46.56
0	FRACOTYP - POSTALIA	\$2,000.00
60419	GEORGIA CONRAD	\$15.05
0	GUEST, AMBER M	\$80.40
0	HEIDI WISMER	\$300.00

Yamhill-Carlton School District No. 1

Approval of Bills Report

Fiscal Year: 2022-2023

Criteria: **From Check Date:** 01/01/2023 **To:** 01/31/2023 **Voucher:** ALL
Report Sort: FUND **From Fund:** 100 **To:** 900

Page Break

Exclude Invoice Description

Check Number	Vendor	Amount
100 - GENERAL FUND		
0	HUDL	\$1,098.00
0	HUNTER-DAVIDSON INC	\$4,129.00
0	IMAGINE LEARNING LLC	\$10,525.00
60391	IRON MOUNTAIN INCORPORATED	\$264.63
0	JANA FERRIS	\$1,227.99
60420	JOHN DORT	\$97.00
0	JONATHAN GROVER	\$119.00
0	JOY GEPHART	\$434.21
60421	KASSIA JACKSON	\$106.21
60422	KEZIA NAFFIN	\$67.00
0	KONE INC	\$660.90
0	KRISTA CAIN	\$52.30
60413	LAKERIDGE HIGH SCHOOL	\$125.00
0	LATISHA BARKER	\$30.06
60384	LIBRARY WORLD, INC	\$495.00
0	LOMELI, JASMINE	\$90.00
60423	LORI BROUILLETTE	\$158.49
60392	LOWE'S COMPANIES INC.	\$320.39
60431	LOWE'S COMPANIES INC.	\$31.29
0	LYONS, RICHARD TYLER	\$26.13
60385	MCMINNVILLE GAS INC.	\$12,398.50
60432	MCMINNVILLE GAS INC.	\$28,077.69
0	MCNEELY, CHEYENNE L	\$65.94
0	MID COLUMBIA BUS CO., INC	\$129,762.13
0	MOLLY PANIDA	\$110.00
60393	NEWBERG SCHOOL DISTRICT	\$0.00
60424	NICOLE OGLE	\$500.00

Yamhill-Carlton School District No. 1

Approval of Bills Report

Fiscal Year: 2022-2023

Criteria: **From Check Date:** 01/01/2023 **To:** 01/31/2023 **Voucher:** ALL
Report Sort: FUND **From Fund:** 100 **To:** 900

Page Break

Exclude Invoice Description

Check Number	Vendor	Amount
100 - GENERAL FUND		
60414	OADA	\$400.00
60394	OASBO	\$220.00
60415	PACIFIC FIRE SUPPRESSION LLC	\$1,610.00
0	PACIFIC OFFICE AUTOMATION	\$3,831.93
0	PACIFIC OFFICE AUTOMATION (LEASE)	\$3,110.00
60386	PLATT ELECTRIC SUPPLY	\$184.99
60395	PORTLAND GENERAL ELECTRIC	\$17,831.93
0	PROCARE THERAPY	\$4,372.00
0	REBECCA KENT	\$103.38
60408	RECOLOGY OREGON COMPOST, MCMINNVILLE	\$140.00
60409	RECOLOGY OREGON COMPOST, MCMINNVILLE	\$247.50
60410	RECOLOGY OREGON COMPOST, MCMINNVILLE	\$338.00
60407	RECOLOGY WESTERN OREGON GARBAGE	\$1,936.66
0	RHONDA BONHAM	\$142.61
60387	SAFEGUARD BUSINESS SYSTEMS	\$418.37
60433	SALEM WRESTLING OFFICIALS	\$206.75
0	SARAH RABE	\$172.50
0	SAVVAS LEARNING COMPANY LLC	\$731.22
0	SIERRA SPRINGS	\$92.41
0	STEPHANIE KINTNER	\$620.00
60397	THE HOME DEPOT PRO	\$743.80
60416	THE HOME DEPOT PRO	\$1,941.43
60435	THE HOME DEPOT PRO	\$2,128.10
60398	THE YARD ARTISAN LLC	\$130.00
60436	THE YARD ARTISAN LLC	\$130.00
0	UMPQUA BANK-CC	\$775.28
60417	UNITED RENTALS (NORTH AMERICA) INC	\$112.20

Yamhill-Carlton School District No. 1

Approval of Bills Report

Fiscal Year: 2022-2023

Criteria: From Check Date: 01/01/2023 To: 01/31/2023 Voucher: ALL
 Report Sort: FUND From Fund: 100 To: 900 Page Break

Exclude Invoice Description

Check Number	Vendor	Amount
100 - GENERAL FUND		
60425	VALERIE BREWER	\$393.18
0	VERIZON WIRELESS	\$310.08
60399	WEST LINN-WILSONVILLE SCHOOL DIST	\$125.00
60400	WILCO	\$36.51
60401	WILLAMETTE E.S.D.	\$210.00
0	YAMHILL SHELL STATION	\$598.96
60418	ZIPLY FIBER	\$3,468.68
Total for 100 - GENERAL FUND		\$269,853.01
201 - TITLE IA		
0	ESS WEST LLC	\$126.66
Total for 201 - TITLE IA		\$126.66
212 - ESSER II FUNDS 2020-2023		
60428	CHARACTERSTRONG LLC	\$4,498.00
60401	WILLAMETTE E.S.D.	\$3,718.80
Total for 212 - ESSER II FUNDS 2020-2023		\$8,216.80
213 - ESSER III FUNDS		
60389	BRIGHTSIDE ELECTRIC AND	\$54,000.00
Total for 213 - ESSER III FUNDS		\$54,000.00
230 - MISC GRANTS		
0	COLLINS, JARED MICHAEL	\$328.75
0	UMPQUA BANK-CC	\$472.79
Total for 230 - MISC GRANTS		\$801.54
233 - MEASURE 98		
0	AMAZON CAPITAL SERVICES	\$413.18
0	UMPQUA BANK-CC	\$166.21

Yamhill-Carlton School District No. 1

Approval of Bills Report

Fiscal Year: 2022-2023

Criteria: **From Check Date:** 01/01/2023 **To:** 01/31/2023 **Voucher:** ALL
Report Sort: FUND **From Fund:** 100 **To:** 900

Page Break

Exclude Invoice Description

Check Number	Vendor	Amount
Total for 233 - MEASURE 98		\$579.39
250 - FOOD SERVICES		
0	GOODY MAN DISTRIBUTING INC	\$40.70
0	SPRING VALLEY DAIRY INC	\$1,173.77
60388	SYSCO FOOD SERVICES	\$4,635.32
60434	SYSCO FOOD SERVICES	\$5,817.44
Total for 250 - FOOD SERVICES		\$11,667.23
261 - TAP GRANT ODE		
60426	ALEXIN ANALYTICAL LABORATORIES INC	\$3,075.00
Total for 261 - TAP GRANT ODE		\$3,075.00
280 - STUDENT BODY FUNDS		
0	AMAZON CAPITAL SERVICES	\$346.15
60396	SCHOLASTIC BOOK FAIRS	\$1,721.91
0	UMPQUA BANK-CC	\$180.00
Total for 280 - STUDENT BODY FUNDS		\$2,248.06
283 - YCHS STUDENT BODY		
0	AMAZON CAPITAL SERVICES	\$793.24
0	BSN SPORTS LLC.	\$524.70
20680	DORMERS SCREENPRINTING	\$245.00
20678	DOUBLE EAGLE SILKSCREEN & EMBROIDERY	\$272.00
20681	FUTURE FARMERS OF AMERICA	\$3,000.00
20682	LEIF WILLIAMS	\$1,800.00
20683	LINFIELD UNIVERSITY	\$1,000.00
20686	MELISSA CRAIG	\$475.00
20679	OASC	\$1,210.00
0	REGALADO, KRISTEN	\$417.52
0	VANDERZANDEN, BRENDA R	\$240.44

Yamhill-Carlton School District No. 1

Approval of Bills Report

Fiscal Year: 2022-2023

Criteria: From Check Date: 01/01/2023 To: 01/31/2023 Voucher: ALL
Report Sort: FUND From Fund: 100 To: 900 Page Break

Exclude Invoice Description

Check Number	Vendor	Amount
283 - YCHS STUDENT BODY		
20677	YAMHILL CARLTON SD 1	\$50,828.69
20687	YAMHILL CARLTON SD 1	\$2,572.99
Total for 283 - YCHS STUDENT BODY		\$63,379.58
Grand Total:		\$413,947.27

End of Report

Yamhill-Carlton School District No. 1

Expenditure Summary Report

Fiscal Year: 2022-2023

Criteria: Report Sort: Fund

From Date: 01/01/2023

To Date: 01/31/2023

Fund: 100	GENERAL FUND					
Remit Name		Check#	FUND	FUNCTION	OBJECT	Amount
<hr/>						
UMPQUA BANK-CC						
		0	GENERAL FUND	OFFICE OF THE PRINCIPAL	INSTR, PROF & TECH SRVS	\$20.00
		0	GENERAL FUND	OFFICE OF THE PRINCIPAL	TRAVEL, OUT OF DISTRICT	\$570.78
		0	GENERAL FUND	OPERATION & MAINTENANCE - PLANT SERVICES	CONSUMABLE SUPPLIES & MATERIALS	\$111.50
		0	GENERAL FUND	OPERATION & MAINTENANCE - PLANT SERVICES	REPAIRS & MAINTENANCE SERVICES	\$40.00
		0	GENERAL FUND	STUDENTS WITH MENTAL DISABILITIES - LIFE SKILLS	INSTR, PROF & TECH SRVS	\$33.00
				Total for UMPQUA BANK-CC		\$775.28
				Total for GENERAL FUND		\$775.28
<hr/>						
Fund: 230	MISC GRANTS					
Remit Name		Check#	FUND	FUNCTION	OBJECT	Amount
<hr/>						
UMPQUA BANK-CC						
		0	MISC GRANTS	HIGH SCHOOL PROGRAMS	TRAVEL, OUT OF DISTRICT	\$472.79
				Total for MISC GRANTS		\$472.79
<hr/>						
Fund: 233	MEASURE 98					
Remit Name		Check#	FUND	FUNCTION	OBJECT	Amount
<hr/>						
UMPQUA BANK-CC						
		0	MEASURE 98	HIGH SCHOOL PROGRAMS	CONSUMABLE SUPPLIES & MATERIALS	\$166.21
				Total for MEASURE 98		\$166.21
<hr/>						
Fund: 280	STUDENT BODY FUNDS					
Remit Name		Check#	FUND	FUNCTION	OBJECT	Amount
<hr/>						
UMPQUA BANK-CC						
		0	STUDENT BODY FUNDS	UNDESIGNATED	ACCOUNTS RECEIVABLE	\$180.00
				Total for STUDENT BODY FUNDS		\$180.00

Yamhill-Carlton School District No. 1

Expenditure Summary Report

Fiscal Year: 2022-2023

Criteria: Report Sort: Fund

From Date: 01/01/2023

To Date: 01/31/2023

Grand Total: \$1,594.28

Recap for FUND for GENERAL FUND

100	GENERAL FUND	\$775.28
230	MISC GRANTS	\$472.79
233	MEASURE 98	\$166.21
280	STUDENT BODY FUNDS	\$180.00

End of Report

July 2023

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					



January 2024

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

August 2023

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

2023-2024 Academic Calendar

Small Schools, Big Achievements

February 2024

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

September 2023

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Key Dates

Registration Day (YCIS, YCHS) August 23, 2023	End of 1st Semester February 1, 2024
First Day of School September 5, 2023	End of 2nd Semester/ Last Day of School June 13, 2024

March 2024

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

October 2023

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

No School Days

- State In-Service Day - October 13
- Veterans Day (Observed) - November 10
- Conferences - November 20-21
- Thanksgiving Break - November 22-24
- Winter Break - December 25 - January 5
- Martin Luther King Jr. Day - January 15
- Teacher Work Day - February 2
- Presidents Day - February 19
- Spring Break - March 25-29
- Teacher Work Day - May 10
- Memorial Day - May 27
- Teacher Work Day - June 14



April 2024

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

November 2023

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

May 2024

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

December 2023

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Yamhill Carlton School District

503-852-6980

www.ycsd.k12.or.us

www.facebook.com/yamhillcarlton schooldistrict

Yamhill Carlton School District Office

120 N Larch Place
Yamhill, OR 97148

June 2024

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Yamhill Carlton School District
Nutrition Services

**DOCUMENTED PROCUREMENT PROCEDURES
CHILD NUTRITION PROGRAMS**

[2 CFR 200.318\(a\)](#)

This procurement plan contained on the following pages 1 through 15 will be implemented on February 9, 2023, from that date forward until amended. All procurements must adhere to the standards outlined in [2 CFR 200 subpart D](#) and applicable program regulations when purchasing good or services from the nonprofit food service account. Sponsors must retain all documentation for each procurement per regulations.

Joseph Johnson, Director of Nutrition
Printed Authorized Name*

Authorized Signature*

Date

*As referenced in CNP Web:
Executive Contact for National School Lunch Program
Authorized Representative for Child and Adult Care Food Program
Authorized Representative for Summer Foods Service Program

Yamhill Carlton School District

PROCUREMENT PLAN

The Yamhill Carlton School District will purchase goods, products, and/or services for use in the Child Nutrition Programs (CNP) in compliance with [2 CFR Part 200](#) as well as [7 CFR Part 210](#), [7 CFR 220](#), [7 CFR 225](#), and [7 CFR 250](#). Procurement standards are specifically located in [2 CFR 200.317-327](#) (All Federal Awards and Grants), [7 CFR 210.21](#) (NSLP), [7 CFR 220.16](#) (SBP), [7 CFR 225.17](#) (SFSP), and [7 CFR 250.31](#) (USDA Foods).

The primary purpose of these written procurement procedures is to assure full and open competition, transparency in transactions, comparability, and documentation of all procurement activities. The procurement process practiced by the Yamhill Carlton School District will not restrict or eliminate competition. For example description of goods, products, and/or services to be procured should not contain features that unduly restrict competition. Competition helps assure that goods, products, and/or services will be obtained that best meets your organization's needs.

A new written procurement procedure does not need to be developed every year. However, an annual review of the approved procedures is recommended to assure its relevance to current regulations and policies.

The Director of Nutrition will:

- Evaluate the procurement needs and forecast the amounts to be purchased so the correct method of procurement will be followed.
- Verify no awards, subawards, and contracts with parties that are debarred, suspended, or otherwise excluded from or ineligible for participation in the Federal assistance programs or activities in accordance with [2 CFR 200.214](#).
- Perform a cost or price analysis in connection with every procurement action in excess of the simplified acquisition threshold including contract modifications in accordance with [2 CFR 200.324](#).
- Ensure that contracts contain the applicable provisions described in Appendix II to 2 CFR 200 and 7 CFR 210.21 in accordance with [2 CFR 200.327](#).

Regardless of procurement method, the following factors will be determined regarding allowable cost costs in accordance with [2 CFR 200 Subpart E](#). ([2 CFR 200.400-2 CFR 200.474](#)):

- Be necessary and reasonable for proper and efficient administration of the program(s)
- Be allocable to federal awards applicable to the administration of the program(s)
- Be authorized and not prohibited under federal, state, and local laws.

The Yamhill Carlton School District may set a lower simplified acquisition threshold than the Federal or State. The most restrictive (lowest) threshold must be used in accordance with [2 CFR 200.318](#).

Purchasing will be conducted at the most restrictive procurement threshold and requirements.

Procurement Method	Federal Threshold	State of Oregon Threshold	YCS D Procurement Threshold
Federal Micro-Purchasing / Oregon Small Procurements	Less than \$10,000- 2 CFR 200.320(a)(1)	Less than \$10,000- ORS 279B.065	<u>Less than \$10,000</u>
Federal Small Purchase / Oregon Intermediate Procurement	Less than \$250,000- 2 CFR 200.320(a)(2)	Less than \$150,000- ORS 279B-070	<u>Less than \$150,000</u>
Formal (IFB/RFP)	Greater than \$250,00 or any total Food Service Management Contract- ^{2 CFR} 200.320(b)(1)(2)	Greater than \$150,000- ORS 279B-055 & ORS 279B.060	<u>Greater than \$150,000</u>
Capital Equipment	Over \$5,000- 2 CFR 200.439	Over \$5,000	<u>Over \$5,000</u>

All staff conducting purchasing will be trained on the procurement requirements when using the nonprofit food service account. Procurement training and resources are available on [Oregon Department of Education Child Nutrition Program website](#) and [Institute of Child Nutrition Website](#). Staff that are purchasing good or services will be responsible for referencing USDA Procurement Policy memos at [USDA FNS Documents & Resources](#) website.

Yamhill Carlton School District observes the Oregon simplified acquisition threshold.

Methods of procurement to be followed.

A. Micro-Purchase procedures ([2 CFR 200.320\(a\)\(1\)](#)). This method applies to the purchase of supplies or services when the aggregate dollar amount does not exceed \$10,000. These purchases may be awarded without soliciting competitive quotes if the Sponsor considers the price reasonable in accordance with [2 CFR 200.404](#). Micro-purchases will be divided equitably among qualified suppliers and all purchases will be documented.

The Director of Nutrition or designee:

- Is responsible for contacting potential vendor/contractor.
- Is responsible for documentation of records of the purchase, name of vendor/contractor, price, and the written specifications.
- Is responsible for documentation that the actual product was received.
- Is responsible for documentation that purchases are distributed equitably among qualified suppliers with reasonable prices.

- Is required to sign documentation, confirming a review and the approval of the purchase of the goods, products, and/or services.
- Is responsible for documenting and approving all purchase card purchases when using the micro-purchase procurement method.

B. Federal Informal small purchase/State of Oregon Intermediate Procurement procedures ([2 CFR 200.320\(a\)\(2\)](#), [ORS 279B.070](#)). This method applies for purchases of goods, products, and/or services when the aggregate dollar amount is less than \$150,000. Price or rate quotes must be obtained from three (3) or more qualified sources and all purchases must be documented.

- In developing the written specifications, the same information needs to be used for all vendors/contractors. The Sponsor may do its own market research and use prices found online, in catalogs, newspapers, farmer's markets, or obtain prices from grocery stores.
- Each vendor/contractor will be given an opportunity to provide a price or rate quote on the same written specifications.
- The Director of Nutrition is responsible for contacting potential vendors/contractors when price or rate quotes are needed.
- The price quotes are to remain confidential information until the actual award has been made.

The Director of Nutrition or designee is responsible for:

- Contacting potential vendors/contractors when price or rate quotes are needed.
- Awarding contracts based on the lowest and best quote based upon price, quality, service availability, location/region or other documented specification criteria.
- Documentation of records to show selection of vendor/contractor, reasons for selection, names of all vendors/contractors contacted, price quotes from each vendor/contractor, and written specifications.
- Documentation that the actual product specified is received.
- Any time an accepted item is not available, select the acceptable alternate and document the reason for accepting an alternate and keep the documentation on file.
- When using the Federal small purchase method /Oregon Intermediate Procurement, the award will always be given to the most responsive and responsible vendor at the lowest price.
- Verification in the government wide System for Award Management that the awarded Vendor is not debarred, suspended, or otherwise excluded from or ineligible for participation in Federal assistance programs or activities in accordance with [2 CFR 200.214](#).
- Signing documentation, confirming a review and the approval of the purchase of the goods, products, and/or services.
- Acting as the authorized purchaser for the district.

C. Formal purchase procedures: Competitive Sealed Bidding(IFB) & Competitive Sealed Proposals(RFP) ([2 CFR 200.320\(b\)\(1\)\(2\)](#), [ORS 279B.055](#), [ORS 279B.060](#)). This method applies to purchases of supplies or services when the aggregate cost amount is more than \$150,000 or greater than the Sponsor's simplified acquisition threshold or for any Food

Service Management Company contract. The formal procurement method requires the use of an Invitation for Bid (IFB) or a Request for Proposal (RFP).

- The Director of Nutrition is the Sponsors authorized purchaser.
- An announcement of an **Invitation for Bid (IFB) or a Request for Proposal (RFP)** will be placed in the McMinnville Register and/or Oregon Buys to publicize the intent of the Yamhill Carlton School District to purchase needed items. The advertisement for bids/proposals or legal notice will be run in accordance with [OAR 137-047-0300](#).
- An advertisement is required for all purchases over the Sponsor's simplified acquisition threshold of \$150,000. The announcement (advertisement or legal notice) will contain a general description of items to be purchased, the deadline for submission of sealed IFB's and RFP's and the address where complete specifications and other procurement documents may be obtained.
- In an IFB or RFP, each vendor/contractor will be given an opportunity to bid on the same specifications.
- The developer of written specifications or descriptions for procurements will be prohibited from submitting bids or proposals for such products or services.
- The IFB or RFP will clearly define the purchase conditions. The following, shall be addressed in the procurement document:
 - (1) Contract time period
 - (2) CNP Sponsor is responsible for all contracts awarded (statement)
 - (3) Date, time, and location of bid opening
 - (4) How vendor/contractor will be informed of bid acceptance or rejection
 - (5) Delivery schedule
 - (6) Requirements which bidder must fulfill in order for bid to be evaluated
 - (7) Benefits to which the Yamhill Carlton School District will be entitled if the contractor cannot or will not perform as required
 - (8) Statement assuring affirmative steps will be made to involve minority and small business in accordance with [2 CFR 200.321](#).
 - (9) Statement regarding the return of purchase incentives, discounts, rebates, and credits to the Yamhill Carlton School District non-profit Child Nutrition account when using a cost reimbursable cost method. [7 CFR 210.21\(f\)](#)
 - (10) Contract and/or purchase orders may be issued for firm fixed prices after formal bidding process
 - (11) Price adjustment clause based on appropriate standard or cost index in accordance with [USDA Policy Memo SP 10-2009](#).
 - (12) Method of evaluation and type of contract to be awarded
 - (13) Method of award announcement and effective date (if intent to award is required by State or local procurement requirements)
 - (14) Specific bid protest procedures including contact information of person and address and the date by which a written protest must be received
 - (15) Provision requiring access by duly authorized representatives of the Yamhill Carlton School District, State Agency, United States Department of Agriculture, or Comptroller General to any books, documents, papers and records of the contractor which are directly pertinent to all negotiated contracts.

- (16) Method of shipment or delivery upon contract award.
- (17) Program Regulations: The contractor shall be in conformance with the applicable portions of the Yamhill Carlton School District's agreement under the program. The contractor will conduct program operations in accordance with [7 CFR Parts 210](#), [7 CFR 215](#), [7 CFR 220](#), [7 CFR 225](#), [7 CFR 226](#) and [7 CFR 250](#).
- (18) The contractor shall provide products that meet the Public Law 111-296, the Healthy, Hunger-Free Kids Act of 2010 (HHFKA). The contractor's products shall meet grade level caloric, sodium, saturated fat, and trans fat requirements as applicable for your program.
- (19) Affordable Care Act: The contractor understands and agrees that it shall be solely responsible for compliance with the patient Protection and Affordable Care Act, Public Law 111-148 and the Health Care and Education Reconciliation Act, Public Law 111-152 (collectively the Affordable Care Act "ACA"). The contractor shall bear sole responsibility for providing health care benefits for its employees who provide services to the Yamhill Carlton School District as required by State or Federal law.
- (20) Buy American Provision (applies to NSLP, SBP, and USDA Foods): The contractor will purchase, to the maximum extent practicable, domestic commodities or products in accordance with [7 CFR 210.21\(d\)](#) and [7 CFR 220.16\(d\)](#). The contractor shall purchase, to the maximum extent practicable, domestic agricultural commodities or products substantially processed in the United States. "Substantially" means the final processed product contains over 51% domestically grown agricultural commodities. This provision applies to all food purchases paid from the nonprofit school food services account. There are limited exceptions to this provision which allow for the purchase of products not meeting the "domestic" standard as described above (*non-domestic*) in circumstances when use of domestic products is truly not practicable. However, before utilizing an exception, alternatives to purchasing non-domestic food products should be considered.
- (21) Disclosure of Lobbying Activities: Pursuant to Byrd Anti-Lobbying Amendment 31 USC 1352, the contractor must disclose lobbying activities in connection with school nutrition programs. If there are material changes after the initial filing, updated reports must be submitted on a quarterly basis. [2 CFR 200.327](#), [2 CFR 200.450](#) and [2 CFR 200 Appendix II \(Applies to contracts over \\$100,000\)](#)
- (22) Certification Regarding Lobbying: Pursuant to 31 USC 1352, the contractor must submit a certification regarding lobbying which conforms in substance with the language provided in [2 CFR 200.450](#). No appropriated funds may be expended by the recipient of a Federal contract, grant, loan, or cooperative agreement to pay any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with any of the following covered Federal actions. **(Applies to contracts over \$100,000).**
- (23) Certificate of Independent Price Determination: The vendor admits that all prices in their Offer have been arrived at independently, without consultation, communication or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any other Offeror or with any competitor certification regarding non-collusion. [2 CFR 200.324\(a\)](#)
- (24) Civil Rights Compliance: In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its Agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, sex, disability, age, or reprisal or retaliation for prior civil rights activity in any program or activity conducted or funded by USDA.

Persons with disabilities who require alternative means of communication for program information (e.g., Braille, large print, audiotope, American Sign Language, etc.) should contact the Agency (State or local) where they applied for benefits. Individuals who are deaf, hard of hearing or have speech disabilities may contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information may be made available in languages other than English.

To file a program complaint of discrimination, complete the USDA Program Discrimination Complaint Form, AD-3027, found online at

http://www.ascr.usda.gov/complaint_filing_cust.html, and at any USDA office, or write a letter addressed to USDA and provide in the letter all of the information required in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by: (a) mail: U.S. Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410; (2) fax: (202) 690-7442; or (3) email: program.intake@usda.gov.

- (25) Clean Air Act, Clean Water Act, and Environmental Protection Agency Regulation: The contractor will comply with all applicable standards, orders or requirements issued under Section 306 of the Clean Air Act, Section 508 of the Clean Water Act, Executive Order 11738 and Environmental Protection Agency regulations which prohibit the use, under nonexempt federal contracts, grants or loans to facilities included on the EPA list of Violating Facilities. The CNP Sponsor will report all violations to ADE and to the USEPA Assistance Administrator for Enforcement. **(Applies to contracts over \$150,000)** [Appendix II to 2 CFR Part 200](#)
- (26) Contract Work Hours and Safety Standard Act: The contractor shall comply with Sections 103 and 107 of the Contract Work Hours and Safety Standards Act (40 U.S.C. 327-330) as supplemented by Department of Labor regulations (29 CFR Part 5). **(Applies to contracts over \$100,000).** [Appendix II to 2 CFR Part 200](#)
- (27) Debarment, Suspension, Ineligibility and Voluntary Exclusion: By signing the Offer & Award form, the contractor shall certify that they have not been debarred, suspended, or otherwise excluded from or ineligible for participations in federal assistance programs under executive order 12549 and 12689. The contractor shall comply with regulations implementing Office of Management and Budget Guidance in Non-procurement Debarment and suspension codified at 2 CFR 180, 2 CFR 417, [2 CFR 200.214](#) and [ORS 279B.130](#). These regulations restrict transactions with certain parties that are debarred, suspended or otherwise excluded from, or ineligible for, participation in Federal assistance programs or activities. (2 CFR 180.220(b)(1).
- (28) Energy Policy and Conservation Act: The contractor shall meet the mandatory standards and policies relating to energy efficiency which are contained in the State Energy Conservation Plan issued in compliance with the Energy Policy and Conservation Act. (Pub. L. 94-163,89 Stat.871)
- (29) Equal Employment Opportunity: The contractor shall comply with Executive Order 11246 of September 24, 1965, entitled "Equal Employment Opportunity," as amended by Executive Order 11375 of October 13, 1967, and as supplemented in Department of Labor regulations. (41 CFR Chapter 60). [Appendix II to 2 CFR Part 200](#)
- (30) Record Keeping: The books and records of the contractor pertaining to operations under this agreement shall be available to the Yamhill Carlton School District at any reasonable time. These records are subject to inspection or audit by representatives of the Yamhill Carlton School District, State Agency, the USDA, and the US General Accounting Office at any reasonable time and place. The Yamhill Carlton School

District shall maintain such records, for a period of not less than three (3) years after the final day of the contract, or longer if required for audit resolution. ([2 CFR Part 200.334](#)).

- (31) Invoicing: The contractor fully discloses all discounts, rebates, allowances and incentives received by the Yamhill Carlton School District from its suppliers. If the contractor receives a discount, rebate, allowance, or incentive from any supplier, the contractor must disclose and return to the Yamhill Carlton School District the full amount of the discount, rebate, or applicable credit that is received based on the purchases made on behalf of the Yamhill Carlton School District. The contractor must identify the amount of each discount, rebate and other applicable credit on bills and invoice presented to the Sponsor for payment and individually identify the amount as a discount, rebate, or in the case of other applicable credits, the nature of the credit. ([2 CFR 200](#) and [7 CFR 210.21](#))

No expenditure may be made from the nonprofit food service account for any cost resulting from a cost-reimbursable contract that fails to include the requirements of [2 CFR 200](#) and [7 CFR 210.21](#), nor may any expenditure be made from the nonprofit food service account that permits or results in the contractor receiving payments in excess of the contractor's actual, next allowable costs. ([2 CFR 200](#) and [7 CFR 210.21](#))

- (32) Termination Clause: The contract may be terminated for cause and for convenience by the Yamhill Carlton School District. [Appendix II to 2 CFR Part 200](#). **(Applies to contracts over \$10,000)**.

- (33) Signed statement of non-collusion.

- (34) For building projects:

Copeland "Anti-Kickback" Act

All contracts and sub grants in excess of \$2000 for construction or repair awarded by recipients and sub recipients shall include a provision for compliance with the Copeland "Anti-Kickback" Act. [Appendix II to 2 CFR Part 200](#)

- (35) Davis-Bacon Act.

The contractor shall comply with the Davis-Bacon Act (40 U.S.C. 276a to 276a-7) as supplemented by Department of Labor regulations. (29 CFR Part 5) **(Applies to construction contracts over \$2,000)**. [Appendix II to 2 CFR Part 200](#)

- (36) Applying a Geographical Preference. [7 CFR Part 210.21\(g\)](#), [7 CFR 225.17\(e\)](#), [7 CFR 226.22\(n\)](#).

A. Yamhill Carlton School District seeks to increase its purchase of seasonal, minimally processed fresh fruits and raw vegetables as part of the Farm to School Program. Reasons for purchasing local products include the potential cost savings, nutrition education for students, and quality of product.

B. Yamhill Carlton School District is interested in locally grown products specified on an annual or as needed basis.

C. The contractor will make every effort to provide the Yamhill Carlton School District with locally grown products according to the definitions below.

1. Locally Grown: Oregon Grown

2. Minimally processed: Includes refrigerating, adjusting size (peeling, slicing, dicing, cutting, chopping), washing, packaging and adding ascorbic acid or other preservatives to prevent oxidation or produce (as described in USDA's Final Rule of Geographic Preference).

D. All products designated under the geographic preference clause shall be labeled with its designating origin (grower name and address/state or area of production) on each case/invoice delivered.

- E. Locally grown products should be generally free from insect damage and decay (flexible on grading for produce only per USDA guidance). Produce items are to be rinsed, cleaned and packed in appropriate commercial produce packaging such as waxed cardboard boxes or sanitary/reusable bins.
- Specifications will be prepared in accordance with [2 CFR 200.319](#) and provided to potential vendors/contractors desiring to submit IFB or RFP for the products or services requested. Vendors/contractors will be selected using predetermined, documented selection criteria.
 - If any potential vendor/contractor is in doubt as to the true meaning of specifications or purchase conditions, an interpretation will be provided by the Director of Nutrition.
 - The Director of Nutrition is responsible for securing all IFB or RFP.
 - The Director of Nutrition is responsible to ensure all CNP Sponsor procurements are conducted in compliance with applicable Federal regulations, State General Statutes or policies of YCSD.
 - Contract awards will be based on predetermined, specific criteria.
 - In awarding a competitive negotiation (RFP), a set of award criterion in the form of a weighted evaluation sheet will be provided to each bidder in the initial bid document materials. Price alone is not the sole basis for award, but remains the primary consideration when awarding a contract. Following evaluation and negotiations a firm fixed price or cost reimbursable contract is awarded.
 - The contracts will be awarded to the responsible bidder/proposer whose bid or proposal is responsive to the invitation and best meets the needs of YCSD, price, and other factors considered. Any and all bids or proposals may be rejected in accordance with law.
 - The Director of Nutrition is:
 - Responsible to sign on the bid tabulation of competitive sealed bids or the evaluation criterion score sheet of competitive proposals signifying a review and approval of the selections.
 - Responsible review the procurement system to check ensure compliance with applicable laws.
 - Responsible for documentation that the actual product specified is received.
 - Responsible to select the acceptable alternate products.
 - Responsible for documenting acceptable alternates if meeting the Buy American provision is not possible.
 - Responsible for maintaining all documentation of the procurement process.
 - Contractors must inform the Director of Nutrition or designee 24 hours before a product is not available for next day delivery. In the event a non-domestic agricultural product is to be provided to YCSD, the contractor must obtain, in advance, approval of the product. The Director of Nutrition or designee must comply with the Buy American provision.

D. Noncompetitive Procurement (2 CFR 200.320(c)); There are specific circumstances in which noncompetitive procurement can be used. Noncompetitive procurement can only be awarded if one or more of the following circumstances apply:

- (1) The acquisition of property or services, the aggregate dollar amount of which does not exceed the micro-purchase threshold (see paragraph (a));
- (2) The item is available only from a single source;
- (3) The public exigency or emergency for the requirement will not permit a delay resulting from publicizing a competitive solicitation;
- (4) The Federal awarding agency or pass-through entity expressly authorizes a noncompetitive procurement in response to a written request from the non-Federal entity;
or
- (5) After solicitation of a number of sources, competition is determined inadequate.

When a noncompetitive procurement is used the YCSD will prepare and provided written specification to the vendor/contractor in accordance with [2 CFR 200.319\(d\)](#).

The Director of Nutrition is responsible for the documentation of records to fully explain the decision to use the non-competitive negotiation and maintaining records for audit and review; documentation that the actual product or service specified was received and reviewing the procedures to be certain all requirements for using single source or non-competitive negotiation are met.

- Non-competitive negotiations shall be used for one-time purchases of a new food item in order to determine food acceptance by students and for samples for testing purposes. A record of non-competitive negotiation purchase shall be maintained by the Director of Nutrition. The record of non-competitive purchases shall include, at a minimum, the following:
 - a. Item name
 - b. Dollar amount
 - c. Vendor/contractor, and
 - d. Reason for non-competitive procurement

E. Emergency Procurement (2 CFR 200.320(c)(3) and ORS 279B.080). If it is necessary to make an emergency procurement to continue service, the purchase shall be made, and a log of all such purchases shall be maintained by the Director of Nutrition or designee. The following emergency procedures shall be followed. All emergency procurements shall be approved by the Director of Nutrition. At a minimum, the following emergency procurement procedures shall be documented:

- a. Item name
- b. Dollar amount
- c. Vendor/contractor, and
- d. Reason for emergency

- F. Record Keeping (2 CFR 200.334, 7 CFR 210.23(c), 7 CFR 225.15(c), 7 CFR 226.15(e), and 7 CFR 250.54):** The SFA and contractor shall agree to retain all books, records and other documents relative to the contract agreement for three (3) years after final payment. The CNP Sponsor, its authorized agents, State Agency, and/or USDA auditors shall have full access to and the right to examine any of said materials during said period. Specifically, the CNP Sponsor shall maintain, at a minimum, the following documents:
- a. Written rationale for the method of procurement;
 - b. A copy of the original solicitation;
 - c. The selection of contract type;
 - d. The bidding and negotiation history and working papers’
 - e. The basis for contractor selection;
 - f. Approval from the State agency to support a lack of competition when competitive bids or offers are not obtained;
 - g. The basis for award cost or price;
 - h. The terms and conditions of the contract;
 - i. Any changes to the contract and negotiation history;
 - j. Billing and payment records’
 - k. A history of any contractor claims; and
 - l. A history or any contractor breaches.

G. Equipment Purchases (2 CFR 200.439): If the amount of purchase for equipment is greater than \$5,000, the following procedure is used. Equipment means tangible personal property (including information technology systems) having a useful life of more than one (1) year and per-unit acquisition cost which equals or exceeds the lesser of the capitalization level established by the non-Federal entity for financial statements purposes, or \$5,000. During an administrative review, as required by 7 CFR Part 210.18, and audits as required by 2 CFR 200.501, the YCSD’s equipment purchases will be reviewed. Sponsors may purchase any equipment from the Pre-Approved Capital Equipment List (see list located at: <http://www.oregon.gov/ode/students-and-family/childnutrition/Documents/capital-equipment-fns-pre-approved-list-06162016-final.pdf>) following proper Federal, State, or local procurement procedures, as applicable, without submitting a *Capitol Equipment Purchase Request* to Agency for approval.

F. The Director of Nutrition will:

- Develop written specifications of required equipment and provide them to vendors.
 - Award successful quotes based on predetermined criteria.
 - Document selection of vendor, all vendors contacted, price quotes and written specifications.
 - Document that specified product is received.
- Each vendor will be contacted and given an opportunity to provide a price quote on the same specifications. An adequate number of vendors shall be contacted.
- Price quotes will receive appropriate confidentiality before award.
- If using the nonprofit food service account or USDA funding for the purchase, the CNP Sponsor will seek prior approval from the Oregon Department of Education by completing the Capital Expenditure Pre-Approval Request.
- The Director of Fiscal Services is responsible for managing Real Property Title, Use, Disposition Selling, and Transferring in accordance with [2 CFR 200.311](#).
- The Director of Fiscal Services is responsible is to ensure at the termination of the award or completion of the project and the unused supplies exceed \$5,000 in total aggregate value and not needed for any other Federal award that supplies are

retained for use on other activities or be sold. In either case, the Federal Government must be compensated for the amount in accordance with [2 CFR 200.314](#).

H. Standards of Conduct (2 CFR 200.318(c)): Yamhill Carlton School District will maintain a written code of standards of conduct that includes procedures that governs the performance of its officers, employees, or agents who are engaged in the award and administration of contracts supported by Child Nutrition Program Funds.

The following conduct will be expected of all persons who are engaged in the awarding and administration of contracts supported by Child Nutrition Program Funds.

- No employee, officer or agent of the Yamhill Carlton School District shall participate in the selection or in the award or administration of a contract supported by program funds if a conflict of interest, real or apparent, would be involved.
- Conflicts of interest arise when one of the following has a financial or other interest in the firm selected for the award:
 - a. The employee, officer or agent;
 - b. Any member of the immediate family;
 - c. His or her partner;
 - d. An organization which employs or is about to employ one of the above;
 - e. A less-than-arms-length transaction. This is one party's ability to control or influence the other party to the transaction. A less-than-arms-length transaction occurs:
 - i. when a transaction is conducted between related parties, meaning that the integrity of the transaction could be compromised;
 - ii. When one party to the transaction is able to control or influence the actions of the other party.
- The Yamhill Carlton School District employees, officers or agents must not solicit or accept gratuities, favors, or anything of monetary value from prospective contractors/vendors, potential contractors, or parties of subcontract.

I. Minority, Women Owned and Small Business (2 CFR 200.321): Yamhill Carlton School District must take all necessary affirmative steps to assure that minority business, women business enterprise, and labor surplus area firms are used when possible.

The following affirmative steps must be used in determining if a firm is available:

- Placing qualified small and minority businesses and women's business enterprises on the solicitation lists;
- Assuring that small and minority businesses and women's business enterprises are solicited whenever they are potential sources;
- Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses and women's business enterprises.

J. Intergovernmental Agency (2 CFR 200.318(e)). The Yamhill Carlton School District is encouraged to enter into state and local intergovernmental agreements or inter-entity

agreements where appropriate for procurement or use of common or shared goods and services.

K. Buy American Provision Requirements (7 CFR 210.21(d) & 7 CFR 220.16(d)): Section 104(d) of the William F. Goodling Child Nutrition Reauthorization Act of 1998 (Public Law 105-336) added a provision, Section 12(n) to the National School Lunch Act (NSLA) (42 USC 1760(n)), requiring school food authorities (SFAs) to purchase, to the maximum extent practicable, domestic commodities or products. This Buy American provision supports the mission of the Child Nutrition Programs, which is to serve children nutritious meals and support American agriculture.

Limited exceptions to the Buy American provision. There are limited exceptions to the Buy American provision which allow for the purchase of foods not meeting the “domestic” standard as described above (i.e., “non-domestic”) in circumstances when use of domestic foods is truly not practicable. These exceptions, as determined by the Director of Nutrition, are:

- The product is not produced or manufactured in the U.S. in sufficient and reasonably available quantities of a satisfactory quality; or
- Competitive bids reveal the costs of a U.S. product are significantly higher than the non-domestic product.

Compliance with, and monitoring of, the Buy American provision. To ensure compliance with the Buy American provision the YCSD will ensure solicitation and contract language includes the requirement for domestic agricultural commodities and products. The Yamhill Carlton School District will also include the Buy American requirement in its documented procurement procedures and retain records documenting any exceptions. Yamhill Carlton School District will ask the supplier, i.e., manufacturer or distributor, for specific information about the percentage of U.S. content in any processed end product. In order for the Director of Nutrition to be able to document the domestic content, they should include in their procurement process a requirement for certifying the domestic percentage of the agricultural food component of commodities and products.

Solicitation and contract language must be monitored by the Director of Nutrition to determine contractor compliance as required by [2 CFR 200.318\(b\)](#), in order to ensure that contractors perform in accordance with the terms, conditions, and specifications of their contracts or purchase orders.

Monitoring is also accomplished by reviewing products and delivery invoices or receipts to ensure the domestic food that was solicited and awarded is the food that is received. The Director of Nutrition also need to conduct a periodic review of storage facilities, freezers, refrigerators, dry storage, and warehouses to ensure the products received are the ones solicited, and awarded, and comply with the Buy American provision.

L. Purchasing Goods and Services Using Cooperative Agreements, Agents, and Third-Party Services (USDA Policy Memo SP-05-2017):

The Director of Nutrition is responsible for:

- When participating in these agreements that the procurement is conducted in accordance with 2 CFR 200.318 through 200.327, 7 CFR 210.21, and [USDA Policy Memo SP-05-2017](#).
- Ensuring Yamhill Carlton School District has all the procurement documents on file detailing the history of the procurement in accordance with 2 CFR 200.318(i).
- Ensuring that adding Yamhill Carlton School District to an existing contract does not create a material change to the original solicitation in accordance with USDA Policy Memo [SP 02-2016](#) and [SP 05-2017](#).

The various purchasing agreements have been classified into three groups:

1. **CNP Program operator-only and/or CNP State agency cooperative agreement.** This is an agreement formed solely between CNP Program operators and may include CNP State agency cooperatives formed to increase purchasing power. This agreement is not a method of procurement, rather an agreement to competitively procure goods and services. Such agreements may include a fixed fee to cover overhead or administrative costs as specified in the cooperative agreement.
2. **Agent.** An agent is a person or business authorized to act on a client's behalf. An agency may be necessary for procuring goods or services when/if the client does not have the necessary technical understanding of the equipment, service, food or other food service supplies to be purchased; or lacks time or expertise to conduct a proper procurement. A procurement agent represents a special fiduciary relationship of trust between itself and its client. In other words, the agent must be contractually required to conduct all competitive procurement methods with its client's interests solely in mind. An agent's services in excess of the micro-purchase threshold currently set at \$10,000 must be competitively procured in accordance with Federal procurement methods outlined in 2 CFR 200.320.
3. **Third-Party entities.** Third-Party entities include State procurement agency agreements, inter-agency agreements, group purchasing organizations, group buying organizations, and third-party vendors.
 - i. **State procurement agency agreements:** This is an inter-governmental agreement with the State which may include public, private, and non-profit entities. This procurement service is not part of the CNP State agency as the services are conducted for State facility needs using State procurement standards and the State allows local educational agencies (LEAs), school food authorities (SFAs), and other CNP operators to purchase from the State's contracted sources. When competitive procurement methods are conducted by the Program operator, this agreement may be one source of prices when using small purchase procedures, sealed bids or competitive proposals, as applicable.
 - ii. **Inter-agency agreements:** This is an agreement which may include public, private, and non-profit entities formed to procure goods and services together. An example is an educational hub whose purpose is to purchase goods and services for LEAs. When competitive procurement methods are conducted by the Program operator, this agreement may be one source of prices when using small purchase procedures, sealed bids or competitive proposals, as applicable.
 - iii. **Group Purchasing Organizations, Buying Organizations, and Third-Party Vendors.** Collectively referred to here as GPOs, these often include CNP and non-Program operators such as public and private schools, hospitals, universities, law enforcement, public works, etc. who join a third-party company or service provider. GPOs could be private for-profit or nonprofit entities. A GPO is typically structured in a way that may include a membership fee paid by member users, who are then granted access to the GPO price list of products and services. When competitive procurement methods are conducted by the Program operator, GPO price lists may be one source of prices when using small purchase procedures, sealed bids or competitive proposals, as applicable.

M. USDA Foods: The Director of Nutrition is responsible when purchasing end products, distribution, or other processing services from processors to meet the procurement requirements outlined in [7 CFR 250.31](#) and [7 CFR 250.50](#). The Director of Nutrition is responsible for ensuring that Yamhill Carlton School District has Food Recall Procedures in accordance with [7 CFR 250.15\(c\)](#) and USDA manual "[Responding to a Food Recall Procedures for Recalls of USDA Foods](#)".



**2023-2025
Local Service Plan
Resolution 2023-02**

Approved by the Executive Council on November 17, 2022 Adopted by the Willamette ESD Board on December 6, 2022

Integrity ♦ Innovation ♦ Excellence ♦ Partnerships

BE IT RESOLVED THAT, pursuant to the provisions of ORS 334.175, the Board of Directors of the Willamette ESD approves the following 2023-2025 Local Service Plan Resolution.

**WESD PROVIDED SERVICES:
No Cost to Districts**

- | | |
|---|--|
| <ul style="list-style-type: none"> • Attendance Supervisor (Districts less than 1000 students) • Crisis Response Team • Homeschool Registration • Regional Leadership Meetings • Student Success Act Supports • Migrant Education • Early Intervention/Early Childhood Special Education | <ul style="list-style-type: none"> • REN Professional Development Opportunities • REN Design Teams • Grow Your Own Program • School Safety & Prevention Services • Youth Suicide Prevention Services • English Learner Supports • Regional Inclusive Services |
|---|--|

PROGRAMS FOR CHILDREN WITH SPECIAL NEEDS:

- Audiology Services
- Autism Services
- Behavior Intervention Program
- Behavior Services
- Braille Transcription Services
- EI/ECSE Evaluations
- Life Skills Classrooms (Regionally Accessible)
- Nursing Services
- Occupational & Physical Therapy Services
- Professional Development/Trainings
- Speech/Language/Augmentative Communication
- Structured Learning Program (Regionally Accessible)
- Transition Specialist Services

TECHNOLOGY SUPPORT:

- Cybersecurity Audits
- Desktop Support
- Email Management
- Instructional Technology Services
- Network Services
- PowerSchool Software
- Software Supports
- Technology Training

SCHOOL IMPROVEMENT SERVICES:

- Distance Learning Supports
- Family Support Advocate Services
- Individualized School Improvement Services
- Library Media Services
- Mid-Willamette Education Consortium
- School Safety Supports
- Social Emotional Learning Services
- Student Internship Coordination
- Willamette Career Academy
- Willamette School Improvement Consortium
- Willamette Promise Services

ADMINISTRATIVE & SUPPORT SERVICES FOR DISTRICTS:

- Business Services
- Communications, Marketing & Promotional Services
- Community Engagement
- Courier
- Criminal History Background Checks
- Data Analysis and/or Data Coaches
- Frontline Education Absence Management
- Grant Writing Services
- Human Resources Services
- Legal Services
- Oregon Data Suite/Early Indication & Intervention Sys.
- Program & Project Evaluation Services
- Substitute Employee Management System
- Translation Services

Services Provided to Entities Other than Component Districts

In an effort to remain transparent, Willamette ESD discloses that the following services may be provided to public or private entities that are outside of the WESD region. In addition to any services listed on page one of this documents, other services may include:

PROGRAMS FOR CHILDREN WITH SPECIAL NEEDS:

- Special Education Services: Autism Spectrum Disorder Consultation and Resources and Classroom services for students who are Deaf and Hard of Hearing. Related Services including, but not limited to: Physical Therapy, Occupational Therapy, Speech Therapy, Autism Specialist and Sign Language Instruction

SCHOOL IMPROVEMENT SERVICES:

- Willamette Promise

TECHNOLOGY SUPPORT:

- PowerSchool Student, Special Education and Business Information System Services, and Email Management

ADMINISTRATIVE AND SUPPORT SERVICES FOR DISTRICTS:

- Contracted Courier Services to Private Schools; Data Analysis; Oregon Data Suite/Early Indication & Intervention System; Program and Project Evaluation Services, Grant Writing Services, Legal Services, Regional Educator Network, and Business Services

This certifies that the 2023-25 Local Service Plan is hereby adopted by the _____ School District on the _____ day of _____, 20____.

Board Chair

Superintendent

If these resolution services are approved by two-thirds of the school districts’ Board of Directors with the majority of the students within WESD, WESD will budget for the services for the 2023-25 fiscal years, subject to the statutory limitation.



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
Ian Barr, Facilities Manager

Date: February 8, 2023

Re: Notice of Intent to Award Contract for the Facilities Assessment and Long Range Facility Plan

Background Information:

The District received a grant from the Oregon Department of Education to conduct both a Facilities Assessment and create a Long Range Facility Plan for the Yamhill Carlton School District. The District issued an Invitation to Bid on December 19, 2022, advertised on Oregon Buys and on our website (www.ycsd.k12.or.us). Proposals were due at 2:00pm on January 24, 2023. The bids were opened at 2:05pm on January 24, 2023. The District received five (5) bids.

The Bids were opened as follows:

R&C Management Group, LLC
Soderstrom Architects
BRIC Architecture Inc
Arcadis IBI Group
Cooperative Strategies LLC

Each set of proposals were reviewed and scored separately by Tami Zigler, Director of Fiscal Services; Ian Barr, Facilities Manager; and Clint Raever, Superintendent. The evaluation and scoring criteria was based on Relevant Oregon experience with school facility projects; experience with facility planning, communications and campaign facilitation services; fee structure; experience and expertise of key staff, references from previous projects; ability to work within the compact time period. A tally of the scored proposals concluded that R&C Management Group is the recommendation from the evaluation committee.

Recommendation:

Approve awarding the Facilities Assessment and Long-Range Facility Plan contract to R&C Management Group for a total award not to exceed amount of \$45,000. As with all contracts, additional costs may be incurred for added or changed scope (e.g. change orders for unknowns, unforeseen, or agency requirements).

Proposed Motion: I move to approve the recommendation and approve a Notice of Intent to Award to R&C Management Group; and to authorize the administration to negotiate and execute a contract with the firm.



January 31, 2023

School District Number Sixteen of Yamhill County,

ATTN: Tami Zigler

Site Name: 300372 Por1 Yamhill

Site ID: 153454

Dear Tami,

I am following up with you regarding our recent telephone conversation setting forth Verizon Wireless's Lease Optimization Program. As discussed during our conversation, Verizon Wireless is interested in making certain modifications to the cell site lease regarding the Verizon Wireless communications facility on your property. These lease modifications will allow the cell site on your property to better meet Verizon Wireless's current operational needs and enhance its long term value to the overall network.

Criteria for Cell Site Retention

As we discussed, Verizon Wireless would like to include this site in its long-term portfolio under the following terms:

- **New Rent Amount:** \$1,000.00 per month, commencing on (April 1, 2023)
- **New Rent Escalator:** Ten Percent (10%) every 5 years (next increase on April 1, 2024)
- **Additional Renewal Terms:** Seven (7) additional five (5) year renewal terms

The foregoing proposal does not constitute a binding offer to amend the lease. No legal obligation is created by this letter or any other written or oral communications until a written amendment to the lease has been signed by both Landlord and Verizon Wireless. Verizon Wireless will continue to abide by the terms of the current lease until an amendment has been executed or the existing lease has been terminated or expires. Verizon Wireless values its affiliation with you and hopes that you choose to secure your site(s) to continue a long and mutually profitable relationship in the years to come. After having reviewed this proposal, please contact me prior to **February 6, 2023**.

Sincerely,

Lynne Rush

Lease Consultant

Lease Optimization - CENREV

O 469-421-9101

180 Washington Valley Road, Bedminster, NJ 07921



2022-2023 Superintendent Evaluation Timeline

Date	ACTION
<p>Open Session Feb 20, 2023 (President’s Day)</p>	<p>Targeted Feedback Survey (TFS) Planning Session (virtual or in-person) <i>Typically, 45 minutes to 1.5 hours and can also be done virtually to help with overall service fees.</i></p>
<p>March 13th</p>	<p>Board individual evaluations of the superintendent due to the board secretary or OSBA consultant.</p> <p><i>Board secretary/OSBA consultant will compile the results (i.e., all board ratings and comments); which will then be provided to the board when they are discussing their own individual evaluations of the superintendent and developing the summative evaluation report.</i></p> <p><i>Recommend the deadline for this be 1-2 weeks before the first exec session takes place, so the OSBA consultant/board secretary has enough time to compile ratings.</i></p>
<p>Executive Session unless otherwise requested by the superintendent to be done in open session ORS 192.660(2)(i).</p> <p>April 10, 2023</p> <p>or</p> <p>April 13,2023</p>	<ol style="list-style-type: none"> 1. Superintendent presents their self-eval and/or artifacts of evidence of performance to the board. 2. OSBA consultant shares TFS summary results (if applicable) 3. Superintendent exits 4. Board discusses their own individual evaluations <i>(i.e., the compiled results of their own direct experience/observation of the superintendent’s performance of standards and superintendent goals, if applicable). During this time, the board will also take into consideration the superintendent’s self-evaluation/artifacts of evidence and TFS summary results (if applicable) to develop the board’s written summative evaluation report. (Speak with one voice)</i> <p><i>Optional: OSBA can help facilitate the summative evaluation discussion with the board to help compile board member ratings into one unified rating. (Speak with one voice)</i></p>
<p>Executive Session TBD unless otherwise requested by the superintendent to be done in open session ORS 192.660(2)(i).</p> <p>(Date TBD)</p>	<p>Board chair presents a draft of the summative evaluation report to the superintendent.</p> <p><i>Typically, at least 3-5 business days for superintendent to review.</i></p>



2022-2023 Superintendent Evaluation Timeline

Executive Session TBD unless otherwise requested by the superintendent to be done in open session ORS 192.660(2)(i).

(Date TBD)

Board schedules another executive session for the superintendent to ask any clarifying questions of the report, superintendent exits, board discusses, makes any changes, if necessary, comes out of executive session and votes in open session to approve the summative evaluation.

A copy of the final written summative evaluation form is placed in the superintendent's personal folder.

Yamhill Carlton School District 1

Code: GCDA/GDDA-AR
Adopted: 10/09/06
Revised/Reviewed: 2/13/12; 8/08/16; 12/14/17; 1/09/20, _____

Criminal Records Checks and Fingerprinting

Requirements

1. Any individual newly hired employee¹, whether full-time or part-time, and not requiring licensure under Oregon Revised Statute (ORS) 342.223 as a teacher, administrator, personnel specialist or school nurse, shall submit to a criminal records check and fingerprinting.
2. Any individual applying for reinstatement of an Oregon license with the Teacher Standards and Practices Commission (TSPC) that has lapsed for more than three years shall be required to undergo a criminal records check and fingerprinting with TSPC.
3. Any individual registering with the TSPC for student teaching, practicum or internship as a teacher, administrator or personnel specialist shall be required to submit to a criminal records check and fingerprinting with TSPC.
4. Any individual hired as or by a contractor², whether part-time or full-time, into a position having direct, unsupervised contact with students as determined by the district shall be required to submit to a criminal records check and fingerprinting.

The superintendent will identify contractors who are subject to such requirements.

5. Any community college faculty member providing instruction at the site of an early childhood education program, a school site as part of an early childhood program or at a grade K through 12 school site during the regular school day, shall be required to undergo a criminal records check and fingerprinting.
6. Any individual who is an employee of a public charter school not requiring licensure under ORS 342.223 shall be required to undergo a criminal records check and fingerprinting.
7. A volunteer allowed to have direct, unsupervised contact with students, into a volunteer position identified in Board policy³ by the district as requiring a fingerprint-based criminal records check, shall undergo a state and national criminal records check based on fingerprints.
8. A volunteer that is not likely to have direct, unsupervised contact with students will be required to undergo an in-state criminal records check.

Exceptions

¹ Any individual hired within the last three months. A subject individual does not include an employee hired within the last three months if the district has evidence on file that meets the definition in Oregon Administrative Rule (OAR) 581-021-0510(11)(b).

² A person hired as or by a contractor and their employees may not be required to submit to fingerprinting until the contractor has been offered a contract by the district.

³ See policy GCDA/GDDA – Criminal Records Checks and Fingerprinting.

A newly hired employee⁴ is not subject to fingerprinting if:

1. The district has evidence on file that the person successfully completed a state and national criminal records check for a previous employer that was a school district or private school, and has not resided outside the state between the two periods of employment; or
2. ⁵The Oregon Department of Education (ODE) determines the person:
 - a. Submitted to a criminal records check for the person's immediately previous employer, the employer is a school district or private school and the person has not lived outside this state between the two periods of employment;
 - b. Submitted to a criminal records check conducted by TSPC within the previous three years; or
 - c. Remained continuously licensed or registered with the TSPC.

Notification

1. The district will provide the following notification to individuals subject to criminal records checks and/or fingerprinting:
 - a. Such criminal records checks and/or fingerprinting are required by law or Board policy;
 - b. Any action resulting from such checks completed by the ODE that impact employment, contract or volunteering may be appealed as a contested case to ODE;
 - c. All employment or contract offers or the ability to volunteer are contingent upon the results of such checks;
 - d. A refusal to consent to a required criminal records check and/or fingerprinting shall result in immediate termination from employment or contract status or the ability to volunteer in the district;
 - e. An individual determined to have knowingly made a false statement as to the conviction of any crime on district employment applications, contracts or ODE forms (written or electronic) may result in immediate termination from employment or contract status;
 - f. An individual determined to have been convicted of any crime that would prohibit employment or contract will be immediately terminated from employment or contract status;
 - g. A volunteer candidate who knowingly made a false statement or has a conviction of the crimes listed in ORS 342.143, or the substantial equivalent of any of those crimes if the conviction occurred in another jurisdiction or in Oregon under a different statutory name or number, will result in immediate termination from the ability to volunteer in the district. The district will remove the volunteer from the position allowing direct, unsupervised contact with students.
2. The district will provide the written notice described above through means such as staff handbooks, employment applications, contracts or volunteer forms.

Processing and Reporting Procedures

1. Immediately following an offer and acceptance of employment or contract, an individual subject to criminal records checks and/or fingerprinting shall complete the appropriate forms authorizing such checks and report to an authorized finger printer as directed by the district. The district shall send such authorization, any collection of fingerprint information, and the request to ODE pursuant to law.
2. Fingerprints may be collected by one of the following:

⁴ Any individual hired within the last three months.

⁵ This revision to TSPC rules sunsets July 1, 2024.

- a. Employing district staff;
 - b. Contracted agent of employing district; or
 - c. Local or state law enforcement agency.
3. To ensure the integrity of the fingerprinting collection and prevent any compromise of the process, the district will provide the name of the individual to be fingerprinted to the authorized finger printer.
 4. The authorized finger printer will obtain the necessary identification and fingerprinting and notify ODE of the results. ODE will then review and notify the district of said results as well as the identity of any individual it believes has knowingly made a false statement as to conviction of a crime, has knowingly made a false statement as to conviction of any crime or has a conviction of a crime prohibiting employment or contract or volunteering.
 5. A copy of the fingerprinting results will be kept by the district.

Fees

1. Fees associated with criminal records checks and/or fingerprinting for individuals applying for employment with the district and not requiring licensure, including persons hired as or by contractors⁶, shall be paid by the individual.
2. Fees associated with required criminal records checks for volunteers shall be paid by the district.
3. Fees associated with a required fingerprinting for volunteers shall be paid by the district.

Termination of Employment or Withdrawal of Employment/Contract Offer/Volunteer Status

1. A subject individual required to submit to a criminal records check and/or fingerprinting in accordance with law and/or Board policy will be terminated from employment or contract status, or withdrawal of offer of employment or contract will be made by the district upon:
 - a. Refusal to consent to a criminal records check and/or fingerprinting; or
 - b. Notification⁷ from the Superintendent of Public Instruction that the employee has a conviction of any crimes listed in ORS 342.143, or the substantial equivalent of any of those crimes if the conviction occurred in another jurisdiction or in Oregon under a different statutory name or number.
2. A subject individual will be terminated from employment or contract status upon notification from the Superintendent of Public Instruction that the employee has knowingly made a false statement as to the conviction of any crime.
3. Employment termination shall remove the individual from any district policies, collective bargaining provisions regarding dismissal procedures and appeals and the provisions of Accountability for Schools for the 21st Century Law.

⁶ A person hired as or by a contractor and their employees may not be required to submit to fingerprinting until the contractor has been offered a contract by the district.

⁷ Prior to making a determination that results in this notification and opportunity for a hearing, the Superintendent of Public Instruction may cause an investigation pursuant to OAR 581-021-0511; involved parties shall cooperate with the investigation pursuant to law.

4. A volunteer who refuses to submit, when required, to a criminal records check or a fingerprint-based criminal records check in accordance with law and/or Board policy will be denied such ability to volunteer in the district.
5. If the district has been notified by the Superintendent of Public Instruction that a volunteer knowingly made a false statement or has a conviction for any crimes listed in ORS 342.143, or the substantial equivalent of any of those crimes if the conviction occurred in another jurisdiction or in Oregon under a different statutory name or number, the individual [will] [may] be denied the ability to volunteer.
6. A volunteer who knowingly makes a false statement, as determined by the district, on a district volunteer application form may be denied the ability to volunteer in the district.

Appeals

A subject individual may appeal a determination from ODE that prevents employment or eligibility to contract with the district to the Superintendent of Public Instruction as a contested case under ORS 183.413 – 183.470.

A volunteer may appeal a determination from a fingerprint-based criminal records checks by ODE that prevents the ability to volunteer with the district to the Superintendent of Public Instruction as a contested case under ORS 183.413 – 183.470.

OSBA Model Sample Policy

Code: IK
Adopted: 10/09/06
Revised/Readopted: 2/13/12; 12/08/14; _____

Academic Achievement**

The Board believes it is important that teachers have as much accurate knowledge of student achievement as possible to assess students' needs and growth; thus, a sharing of information among parent, teacher and student is essential.

The district shall ensure that all students have the opportunity to demonstrate progress toward mastery of the knowledge and skills of the student's current grade level or course content level. Students who have not yet met or who exceed all of the standards at any grade level, will be offered additional services or alternative educational or public school options.

The Board directs staff to follow these guidelines in measuring and determining student progress:

1. Parents and students may be informed at least annually, of their student's progress toward achieving the academic content standards, including but not limited to:
 - a. Information on progress in each subject area to meet or exceed the academic content standards at the student's current grade level or course content level, including major goals used to determine the information;
 - b. Specific evidence of student progress toward mastery of a continuum of academic knowledge and skills (academic content standards) of a subject area, upon request from a parent;
 - c. Student scores on all state and local assessments indicating any of the requirements that have been waived for the district or the individual and time periods for the waiver; and
 - d. Student progress toward completion of diploma requirements to parents of students in grades 9-12, including credits earned, demonstration of extended application and demonstration of the Essential Skills.
2. Parents will be alerted and conferred with as soon as possible when a student's performance or attitude becomes unsatisfactory or shows marked or sudden deterioration;
3. Grades and/or portfolio content assessment will be based upon academic performance and will not include student attitude. Grades will not be used for disciplinary purposes. Absenteeism or misconduct shall not be the sole criterion for the reduction of a student's grade
4. At comparable levels, the school system will strive for consistency in grading and reporting except when this consistency is inappropriate for certain classes or certain students;
5. When no grades are given but the student is evaluated in terms of progress, the school staff will show whether the student is achieving course requirements at the student's current grade level;
6. The staff will take particular care to explain to students the meaning of marks and symbols used to reflect student performance.

END OF POLICY

Legal Reference(s):

[ORS 107.154](#)
[ORS 329.485](#)

[ORS 343.295](#)
[OAR 581-021-0022](#)

[OAR 581-022-2260](#)
[OAR 581-022-2270](#)

Yamhill Carlton School District 1

Code: IKF
Adopted: 4/14/08; 2/13/12; 4/09/20; 12/02/21; _____

Graduation Requirements**

The Board establishes² graduation requirements for awarding of a high school diploma, a modified diploma, an extended diploma and an alternative certificate which meet or exceed state requirements.

A student may satisfy graduation requirements in less than four years. The district will award a diploma to a student fulfilling graduation requirements in less than four years if consent is given by the student's parent or guardian or by the student if the student is 18 years of age or older or emancipated.

If the district requires diploma requirements beyond the state requirements, the district shall grant a waiver for those requirements to any student who, at any time from grade 9 to 12, was:

1. A foster child¹;
2. Homeless;
3. A runaway;
4. A child in a military family covered by the Interstate Compact on Educational Opportunity for Military Children;
5. A child of a migrant worker; or
6. Enrolled in the Youth Corrections Education Program or the Juvenile Detention Education Program.
7. For any student identified above, the district shall accept any credits earned by the student in an educational program² in this state, applying those credits toward the state requirements for a diploma if the credits satisfied those requirements in that educational program in this state.

Diploma

A high school diploma will be awarded to students in grades 9 through 12 who complete a minimum of 24 credits³ which include at least:

¹ As defined in ORS 30.297.

² "Educational program in this state" means an educational program that is provided by a school district, a public charter school, the Youth Corrections Education Program or the Juvenile Detention Program, or funded as provided by ORS 343.243 for students in a long term care or treatment facility described in ORS 343.962 or a hospital identified in ORS 343.261.

³ If the district has additional credit or graduation requirements, the district is required to include those additional credits and graduation requirements in the following lists. However, if the district provides an education as described in ORS 336.585 or 336.590 and awards high school diplomas, the district may not impose requirements for a high school diploma in those instances that are in addition to the requirements prescribed by ORS 329.451 (2)(a) or by rule of the State Board of Education.

1. Three credits in mathematics (shall include one unit at the Algebra I level and two units that are at a level higher than Algebra I);
2. Four credits in language arts (shall include the equivalent of one unit in written composition);
3. Three credits in science;
4. Three credits in social sciences (including history, civics⁴, geography and economics (including personal finance));
5. One credit in health education;
6. One credit in physical education;
7. Three credits in career and technical education, the arts or world languages (units shall be earned in any one or a combination), and
8. One credit in Advisory/Career Exploration.

Honors Diploma

In addition to the Standard Diploma, Yamhill Carlton High School offers an Honors Diploma. The Honors Diploma recognizes the student who pursues a more rigorous course load throughout their four years of high school. An honors diploma will be awarded to students in grades 9 through 12 who maintain a 3.5 cumulative GPA complete a minimum of 26 credits which include at least:

1. Four credits in mathematics (shall include one unit at the Algebra I level and two units that are at a level higher than Algebra I);
2. Four credits in language arts (shall include the equivalent of one unit in written composition);
3. Four credits in science;
4. Three credits in social sciences (including history, civics⁵, geography and economics (including personal finance));
5. One credit in health education;
6. One credit in physical education;
7. Three credits in career and technical education, the arts or world languages⁵ (units shall be earned in any one or a combination); and
8. One credit in Advisory/Career Exploration.
9. Complete 3 of the specialty categories from the following list:

⁴ Civics becomes a half-credit requirement beginning on January 1, 2026 (Senate Bill 513, 2021).

⁵ “World language” includes sign language, heritage language and languages other than a student’s primary language.

Mathematics	5 Credits including Calculus
Science	4 Credits – <i>If 3 Credits, must be Biology I and above, not CTE</i>
Spanish	4 Credits
Adv. Humanities	2 of the following; Adv. English, Adv. US History, Law & Politics, History Through Film or Veteran’s Legacies. (<i>earning college credit not required</i>)
Fine and Performing Arts	4 Years of the same track (Theater, Music or Visual Arts)
CTE	4 credits

Distinguished Diploma

In addition to the Standard Diploma, Yamhill Carlton High School offers a Distinguished Diploma. The Distinguished Diploma recognizes the student who pursues a more rigorous course load than is required by the Honors Diploma throughout their four years of high school. A Distinguished diploma will be awarded to students in grades 9 through 12 who maintain a 3.5 cumulative GPA complete a minimum of 28 credits which include at least:

1. Four credits in mathematics (shall include one unit at the Algebra I level and two units that are at a level higher than Algebra I);
2. Four credits in language arts (shall include the equivalent of one unit in written composition);
3. Four credits in science;
4. Three credits in social sciences (including history, civics⁶, geography and economics (including personal finance));
5. One credit in health education;
6. One credit in physical education;
7. Four credits in career and technical education, the arts or world languages (units shall be earned in any one or a combination); and
8. One credit in Advisory/Career Exploration.
9. Complete 4 of the specialty categories from the following list:

Mathematics	5 Credits including Calculus
Science	4 Credits – <i>If 3 Credits, must be Biology I and above, not CTE</i>
Spanish	4 Credits

⁶ Civics becomes a half-credit requirement beginning on January 1, 2026 (Senate Bill 513, 2021).

Adv. Humanities	2 of the following; Adv. English, Adv. US History, Law & Politics, History Through Film or Veteran’s Legacies. (<i>earning college credit not required</i>)
Fine and Performing Arts	4 Years of the same track (Theater, Music or Visual Arts)
CTE	4 credits

The district shall offer students credit options provided the method for obtaining such credits is described in the student’s personal education plan and the credit is earned by meeting requirements described in Oregon Administrative Rule (OAR) 581-022-2025.

To receive a diploma, in addition to credit requirements outlined in OAR 581-022-2000, a student must⁷:

1. Develop an education plan and build an education profile;
2. Demonstrate extended application through a collection of evidence; and
3. Participate in career-related learning experiences.

A modified diploma will be awarded only to students who have demonstrated the inability to meet the full set of academic standards adopted by the State Board of Education for a diploma while receiving reasonable modifications and accommodations. A modified diploma may only be awarded to a student who meets the eligibility criteria below and other criteria, if applicable, outlined in OAR 581-022-2010(3):

1. Has a documented history of an inability to maintain grade level achievement due to significant learning and instructional barriers; or
2. Has a documented history of a medical condition that creates a barrier to achievement.

Having met the above eligibility criteria, a modified diploma will be awarded to students who, while in grade nine through completion of high school, complete 24 credits which shall include:

1. Three credits in language arts;
2. Two credits in mathematics;
3. Two credits in science;
4. Two credits in social sciences (which may include history, civics, geography and economics (including personal finance));
5. One credit in health education;
6. One credit in physical education;

⁷ The proficiency in Essential Skills requirement has been waived and is not a condition of receiving a high school diploma during the 2021-2022, 2022-2023 or 2023-2024 school year (Senate Bill 744, 2021).

7. One credit in career technical education, the arts or world languages (units may be earned in any one or a combination); and
8. One credit in Advisory/Career Exploration.

Students may earn additional credits to earn a modified diploma pursuant to OAR 581-022-2010.

In addition to credit requirements as outlined in OAR 581-022-2010, a student must:

1. Develop an education plan and build an education profile; and
2. Demonstrate extended application through a collection of evidence.

Districts may make modifications to the assessment for students who seek a modified diploma when the following conditions are met:

1. For a student on an individualized education program (IEP) or Section 504 plan, any modifications to work samples must be consistent with the requirements established in the IEP or 504 plan. Modifications include practices and procedures that compromise the intent of the assessment through a change in learning expectations, construct, or content that is to be measured, grade level standard, or measured outcome of the assessment. This means that IEP or 504 school teams responsible for approving modifications for a student's assessment may adjust the administration of the assessment and/or the assessment's achievement standard;
2. For a student not on an IEP or 504 plan, any modifications to work samples must have been provided to the student during their instruction in the content area to be assessed and in the year in which the student is being assessed, and modifications must be approved by the school team that is responsible for monitoring the student's progress toward the modified diploma.

Students not on an IEP or a Section 504 Plan may not receive a modified Smarter Balanced assessment.

A student's school team shall decide that a student should work toward a modified diploma no earlier than the end of grade six and no later than two years before the student's anticipated exit from high school. A student's school team may decide to revise a modified diploma decision.

A student's school team may decide that a student who was not previously working toward a modified diploma should work toward one when the student is less than two years from anticipated exit from high school if the documented history has changed.

Beginning in grade five or beginning after a documented history to qualify for a modified diploma, the district shall annually provide to the parents or guardians of the student, information about the availability and requirements of a modified diploma.

Extended Diploma

An extended diploma will be awarded only to students who have demonstrated the inability to meet the full set of academic content standards adopted by the State Board of Education for a diploma while receiving modifications and accommodations. To be eligible for an extended diploma, a student must:

1. While in grade nine through completion of high school, complete 12 credits, which may not include more than six credits in a self-contained special education classroom and will include:
 - a. Two credits in mathematics;
 - b. Two credits in language arts;
 - c. Two credits in science;
 - d. Three credits in history, geography, economics or civics;
 - e. One credit in health;
 - f. One credit in physical education; and
 - g. One credit in the arts or a world language.

2. Have a documented history of:
 - a. An inability to maintain grade level achievement due to significant learning and instructional barriers;
 - b. A medical condition that creates a barrier to achievement; or
 - c. A change in the student's ability to participate in grade level activities as a result of a serious illness or injury that occurred after grade eight.

Beginning in grade five or beginning after a documented history to qualify for an extended diploma, the district shall annually provide to the parents or guardians of the student, information about the availability and requirements of an extended diploma.

Alternative Certificates

Alternative certificates will be awarded to students who do not satisfy the requirements for a diploma, a modified diploma, or an extended diploma if the students meet minimum requirements established by the district.

Beginning in grade five or beginning after a documented history to qualify for an alternative certificate, the district shall annually provide to the parents or guardians of the student, information about the availability and requirements of an alternative certificate.

Other District Responsibilities

The district will ensure that students have onsite access to the appropriate resources to achieve a diploma, a modified diploma, an extended diploma, or an alternative certificate at each high school. The district will provide age-appropriate and developmentally appropriate literacy instruction to all students until graduation.

The district may not deny a student the opportunity to pursue a diploma with more stringent requirements than a modified diploma or an extended diploma for the sole reason the student has the documented history listed under the above modified diploma or extended diploma requirements.

The district may award a modified diploma or an extended diploma to a student only upon the written consent of a student who is emancipated or who has reached the age of 18 at the time the modified or extended diploma is awarded, or the student's parent or guardian. The district shall receive the written consent during the school year in which the modified diploma or the extended diploma is awarded.

A student shall have the opportunity to satisfy the requirements for a modified diploma, an extended diploma or an alternative certificate in the later of 4 years after starting the ninth grade, or until the student reaches the age of 21 if the student is entitled to a public education until the age of 21 under state or federal law.

A student may satisfy the requirements for a modified diploma, an extended diploma or an alternative certificate in less than four years but not less than three years. To satisfy the requirements for a modified diploma, an extended diploma or an alternative certificate in less than four years, the student's parent or guardian or a student who is emancipated or has reached the age of 18 must provide written consent which clearly states the parent, guardian or student is waiving the fourth year and/or years until the student reaches the age of 21. A copy of the consent will be forwarded to the district superintendent who will annually report to the Superintendent of Public Instruction the number of such consents.

A student who qualifies to receive or receives a modified diploma, an extended diploma, or an alternative certificate shall have the option of participating in a high school graduation ceremony with the student's class.

A student who receives a modified diploma, an extended diploma, or an alternative certificate shall have access to instructional hours, hours of transition services and hours of other services that are designed to meet the unique needs of the student and when added together provide a total number of hours of instruction and services that equals at least the total number of instructional hours that are required to be provided to students who are attending a public high school.

The district will award to students with disabilities a document certifying successful completion of program requirements. No document issued to students with disabilities educated in full or in part in a special education program shall indicate that the document is issued by such a program. When a student who has an IEP completes high school, the district will give the student an individualized summary of performance.

Eligible students with disabilities are entitled to a free appropriate public education (FAPE) until the age of 21, even if they have earned a modified diploma, an extended diploma, an alternative certificate or completion of a General Education Development document. The continuance of services for students with disabilities for a modified diploma, extended diploma or alternative certificate is contingent on the IEP team determining the student's continued eligibility and special education services are needed.

Students and their parents will be notified of graduation and diploma requirements.

The district may not deny a diploma to a student who has opted out of statewide assessments if the student is able to satisfy all other requirements for the diploma. Students may opt-out of the Smarter Balanced or alternate Oregon Extended Assessment by completing the Oregon Department of Education's Opt-out Form⁹ and submitting the form to the district.

The district will issue a high school diploma pursuant to Oregon law (ORS 332.114) to a veteran if the veteran resides within the boundaries of the district or is an Oregon resident and attended a high school of the district, or to a deceased veteran, upon request from a representative of the veteran, if the deceased

Oregon Department of Education page for: [30-day notice and opt-out form](#)

veteran resided within the boundaries of the district at the time of death or was an Oregon resident at the time of death and attended a high school of the district.

The act of student-initiated test impropriety is prohibited. A student that participates in an act of student-initiated test impropriety will be subject to discipline. “Student-initiated test impropriety” means student conduct that is inconsistent with the *Test Administration Manual* or accompanying guidance; or results in a score that is invalid.

END OF POLICY

Legal Reference(s):

[ORS 329.007](#)
[ORS 329.045](#)
[ORS 329.451](#)
[ORS 329.479](#)
[ORS 332.107](#)
[ORS 332.114](#)
[ORS 339.115](#)

[ORS 339.505](#)
[ORS 343.295](#)

[OAR 581-021-0009](#)
[OAR 581-022-2000](#)
[OAR 581-022-2005](#)
[OAR 581-022-2010](#)

[OAR 581-022-2015](#)
[OAR 581-022-2020](#)
[OAR 581-022-2025](#)
[OAR 581-022-2030](#)
[OAR 581-022-2115](#)
[OAR 581-022-2120](#)
[OAR 581-022-2505](#)

Test Administration Manual, published by the OREGON DEPARTMENT OF EDUCATION.
House Bill 2056 (2021).
Senate Bill 744 (2021).

OSBA Model Sample Policy

Code: **JGAB**
Adopted: 2/13/12
Revised/Readopted: 12/08/14; 12/14/17; 4/09/20: _____

Use of Restraint or Seclusion**

The Board is dedicated to the development and application of best practices within the district's public educational/behavioral programs. The Board establishes this policy and its administrative regulation to define the circumstances that must exist and the requirements that must be met prior to, during, and after the use of restraint or seclusion as an intervention with district students.

The use of the following types of restraint on a student in the district is prohibited:

1. Chemical restraint.
2. Mechanical restraint.
3. Prone restraint.
4. Supine restraint.
5. Any restraint that involves the intentional and nonincidental use of a solid object¹, including a wall or the floor, to impede a student's movement, unless the restraint is necessary to prevent an imminent life-threatening injury or to gain control of a weapon.
6. Any restraint that places, or creates a risk of placing, pressure on a student's mouth, neck or throat.
7. Any restraint that places, or creates a risk of placing, pressure on a student's mouth, unless the restraint is necessary for the purpose of extracting a body part from a bite.
8. Any restraint that impedes, or creates a risk of impeding, breathing.
9. Any restraint that involves the intentional placement of the hands, feet, elbow, knee or any object on a student's neck, throat, genitals or other intimate parts.
10. Any restraint that causes pressure to be placed, or creates a risk of causing pressure to be placed, on the stomach or back by a knee, foot or elbow bone.
11. Any action designed for the primary purpose of inflicting pain.

The use of a seclusion cell is prohibited.

Restraint or seclusion may not be used for discipline, punishment, retaliation or convenience of staff, contractors or volunteers of the district.

¹ The use of a solid object, including furniture, a wall, or the floor, by district staff performing a restraint is not prohibited if the object is used for the staff's own stability or support while performing the restraint and not as a mechanism to apply pressure directly to the student's body.

Restraint may be imposed on a student in the district only under the following circumstances:

1. The student’s behavior imposes a reasonable risk of imminent and substantial physical or bodily injury to the student or others; and
2. Less restrictive interventions would not be effective.

Seclusion may be used on a student in the district only under the following circumstances:

1. The student’s behavior imposes a reasonable risk of imminent and serious bodily injury to the student or others; and
2. Less restrictive interventions would not be effective.

If restraint or seclusion is used on a student, by trained staff or other staff available in the case of an emergency when trained staff are not immediately available due to the unforeseeable nature of the emergency, e.g., teacher, administrator[, or volunteer], it will be used only for as long as the student’s behavior poses a reasonable risk of imminent and substantial physical or bodily injury to the student or others and less restrictive interventions would not be effective. Students will be continuously monitored by staff for the duration of the restraint or seclusion.

Definitions

1. “Restraint” means the restriction of a student’s actions or movements by holding the student or using pressure or other means.

“Restraint” does not include:

- a. Holding a student’s hand or arm to escort the student safely and without the use of force from one area to another;
- b. Assisting a student to complete a task if the student does not resist the physical contact; or
- c. Providing reasonable intervention with the minimal exertion of force necessary if the intervention does not include a restraint prohibited under Oregon Revised Statute (ORS) 339.288 and the intervention is necessary to:
 - (1) Break up a physical fight;
 - (2) Interrupt a student’s impulsive behavior that threatens the student’s immediate safety, including running in front of a vehicle or climbing on unsafe structures or objects; or
 - (3) Effectively protect oneself or another from an assault, injury or sexual contact with the minimum physical contact necessary for protection.

2. “Seclusion” means the involuntary confinement of a student alone in a room from which the student is physically prevented from leaving. Seclusion includes, but is not limited to, the involuntary confinement of a student alone in a room with a closed door, whether the door is locked or unlocked.

“Seclusion” does not include the removal of a student for a short period of time to provide the student with an opportunity to regain self-control if the student is in a setting from which the student is not physically prevented from leaving, or a student being left alone in a room with a closed door for a brief period of time if the student is left alone for a purpose that is unrelated to the student’s behavior.

3. “Seclusion cell” means a freestanding, self-contained unit that is used to isolate the student from other students or physically prevent a student from leaving the unit or cause the student to believe that the student is physically prevented from leaving the unit.
4. “Serious bodily injury” means any significant impairment of the physical condition of a person, as determined by qualified medical personnel, whether self-inflicted or inflicted by someone else.
5. “Substantial physical or bodily injury” means any impairment of the physical condition of a person that requires some form of medical treatment.
6. “Mechanical restraint” means a device used to restrict the movement of a student or the movement or normal function of a portion of the body of a student.

“Mechanical restraint” does not include:

- a. A protective or stabilizing device ordered by a licensed physician; or
 - b. A vehicle safety restraint when used as intended during the transport of a student in a moving vehicle.
7. “Chemical restraint” means a drug or medication that is used on a student to control behavior or restrict freedom of movement that is not prescribed by a licensed physician or other qualified health professional acting under the professional’s scope of practice for standard treatment of the student’s medical or psychiatric condition; and administered as prescribed by a licensed physician or other qualified health professional acting under the professional’s scope of practice.
 8. “Prone restraint” means a restraint in which a student is held face down on the floor.
 9. “Supine restraint” means a restraint in which a student is held face up on the floor.

Any student being restrained or secluded within the district whether in an emergency or as a part of a plan shall be constantly monitored by staff for the duration of the intervention. Any room used for seclusion of a student must meet the standards as outlined in Oregon Administrative Rule (OAR) 581-021-0568.

The district shall utilize the MANDT² training program of restraint or seclusion for use in the district. As required by state regulation, the selected program shall be one approved by the Oregon Department of Education (ODE) and include, but not limited to, positive behavior support, conflict prevention, de-escalation and crisis response techniques. Any program selected by the district must be in compliance with state and federal law with respect to the use of restraint and seclusion.

An annual review of the use of restraint and seclusion during the preceding school year shall be completed and submitted to ODE to ensure compliance with district policies and procedures.

The results of the review and annual report shall be documented and shall include at a minimum:

1. The total number of incidents involving restraint;
2. The total number of incidents involving seclusion;
3. The total number of seclusions in a locked room;
4. The total number of students placed in restraint;

² The district must identify the program utilized for training.

5. The total number of students placed in seclusion;
6. The total number of incidents that resulted in injuries or death to students or staff as a result of the use of restraint or seclusion;
7. The total number of students placed in restraint or seclusion more than 10 times in a school year and an explanation of what steps have been taken by the district to decrease the use of restraint and seclusion for each student;
8. The total number of restraint or seclusion incidents carried out by untrained individuals;
9. The demographic characteristics³ of all students upon whom restraint or seclusion was imposed;
10. The total number of rooms available for use by the district for seclusion of a student and a description of the dimensions and design of the rooms.

This annual report shall be made available to the public at the district’s main office and on the district’s website, and to the Board.

At least once each school year the parents and guardians of students of the district shall be notified about how to access the report.

The district shall investigate all complaints regarding the use of restraint and/or seclusion practices according to the procedures outlined in Board policy KL - Public Complaints and KL-AR - Public Complaint Procedure. The complaint procedure is available at the district’s administrative office and is available on the home page of the district’s website.

The complainant, whether an organization or an individual, may appeal a district’s final decision to the Oregon Department of Education pursuant to OAR 581-002-0001 - 581-002-0023. This appeal process is identified in administrative regulation KL-AR(2) - Appeal to the Deputy Superintendent of Public Instruction.

The superintendent shall develop administrative regulations to carry out the requirements set forth in this policy and to meet any additional requirements established by law related to the use, reporting, and written documentation of the use of restraint or seclusion by district staff.

END OF POLICY

Legal Reference(s):

[ORS 161.205](#)
[ORS 339.250](#)
[ORS 339.285](#)
[ORS 339.288](#)
[ORS 339.291](#)
[ORS 339.294](#)
[ORS 339.297](#)

[ORS 339.300](#)
[ORS 339.303](#)

[OAR 581-021-0061](#)
[OAR 581-021-0550](#)
[OAR 581-021-0553](#)
[OAR 581-021-0556](#)

[OAR 581-021-0563](#)
[OAR 581-021-0566](#)
[OAR 581-021-0568](#)
[OAR 581-021-0569](#)
[OAR 581-021-0570](#)
[OAR 581-022-2267](#)
[OAR 581-022-2370](#)

³ Including race, ethnicity, gender, disability status, migrant status, English proficiency and status as economically disadvantaged, unless the demographic information would reveal personally identifiable information about an individual student.