



**Yamhill Carlton School District
Board of Directors – YCSD Boardroom
120 N Larch Place, Yamhill, OR 97148**

Thursday, June 13th, 2019

Board Work Session 6:45pm

AGENDA

A. *Call to Order Work Session*

B. Sub-Committee Reports:

1. Facilities and Transportation (T. Pfeiffer, J. Bibb)
 - A. Facilities Committee Report
 - B. Bond Project Manager Report
 - C. Next Facilities Committee Meeting
2. Negotiations (S. FitzGerald, Ken Watson) – Continuing thru Summer
3. Board Policy (Susan FitzGerald, K. Watson)
4. Curriculum (S. Fitzgerald, K. Watson)
5. Activities (J. Bibb, T. Pfeiffer)
6. Finance (J. Egland, S. FitzGerald)
7. Communications (J. Bibb, J. Egland)
8. Security & Safety (K. Watson & T. Pfeiffer)

C. Adjournment

Items that are ***BOLD ITALICS*** are possible Action Items.

INTERPRETERS FOR THE HEARING IMPAIRED: To request interpreter services for this meeting call 503-852-6980 at least 24 hours prior to the meeting.



**Yamhill Carlton School District
Board Of Directors
Yamhill Carlton School District Board Room
120 N Larch Place, Yamhill, OR 97148**

Thursday, June 13th, 2019

Regular Session- 7:00 PM

AGENDA

Budget Hearing

- I. Flag Salute
- II. Additions to Budget Document
- III. Public Comment
- IV. Adjournment

REGULAR SESSION

- I. Call to Order Regular Session- 30 Minutes
- II. Individuals, Delegations, Recognition, and Communications

- I. Retiring Board Member – Tim Pfeiffer

Public Comment – The Board welcomes you to its monthly meeting. We ask that you complete an Intent to Speak Form and turn it in to the Board secretary at this time. 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.

III. Review of Agenda

IV. Regular Session- Consent Agenda

1. Approval of Board of Directors Minutes
 - a. Special Session of May 6th, 2019 (Pg 1)
 - b. Budget Committee Meeting # 1 of May 6th, 2019 (Pg 2)
 - c. Work Session & Regular Session of May 9th, 2019 (Pg. 3)
2. Enrollment Report (Pg 7)
3. HR Report (Pg 10)
4. Donations (Pg 11)

V. Announcements and Reports: — 30 Minutes

- I. YCES – Lauren Berg (Pg 12)
- II. YCIS – Chad Tollefson (Pg 13)
- III. YCHS – Cindy Schubert (Pg 15)
- IV. Financial Report and List of Bills for May 2019 (Action Item) (Pg 20)
- V. District Facilities- Brian King – Verbal Report
- VI. Food Service Report (Pg 29)
- VII. Superintendent's Report- Charan Cline (Pg 30)

VI. New Business:

- I. Johnson Controls – Energy Audit Presentation (Action Item) (Pg 31)
- II. Johnson Controls Resolution 2019-08 (Action Item) (Pg 44)
- III. Adopting the Budget – Resolution 2019-09 (Action Item) (Pg 47)
- IV. 2018-2019 Budget Re-Appropriation – Resolution 2019-07 (Action Item) (Pg 48)
- V. Social Studies Curriculum Adoption (Action Item) (Pg 49)
- VI. Ratification of Classified Contract 2019-2021 (Action Item) (Pg 50)
- VII. Meal Prices (Action Item) (Pg 76)
- VIII. July Board Meeting Date
- IX. Board Retreat – July 25th, 2019 8:00am to 12:00pm



**Yamhill Carlton School District
Board Of Directors
Yamhill Carlton School District Board Room
120 N Larch Place, Yamhill, OR 97148**

VII. Board of Directors Comments

**VIII. Executive Session per ORS 192.660(2) (i) Performance Evaluations of Public Officers and Employees
with no action anticipated in Open Session**

Adjournment

Note: Unless approved, Regular Meetings of the Board of Directors will be no longer than 3 hours in length at any single session.

INTERPRETERS FOR THE HEARING IMPAIRED: To request interpreter services for this meeting call 503-852-6980 at least 24 hours prior to the meeting.

YAMHILL CARLTON SCHOOL DISTRICT NO. 1

BOARD OF DIRECTORS

Yamhill Carlton School District Board Room
120 N. Larch Place, Yamhill, OR 97148

Monday, May 6th, 2019

Special Session- 5:30 p.m.

MINUTES

Board Members: Jami Egland (by phone at beginning of meeting, arrived late), Tim Pfeiffer, Susan FitzGerald, Jack Bibb and Ken Watson.

Also Present: DO/Administration Staff: Superintendent Charan Cline, Board Secretary Michelle Rettke, Special Programs Director John Horne, YCIS Principal Chad Tollefson, Board Attorney Paul Dakopolos, OEA Representative Evan Wickersham, YCEA President Susie Schulz, YCES/YCIS Teacher Alex Martin

Also Present: S. Shore, and J. Shore

I. Flag Salute

II. Call to Order by Vice Chair T. Pfeiffer at 5:05pm

III. Executive Session per ORS 192.660(2)(b) Discipline of Public Officers and Employees with no open action in open session.

P. Dakopolos reviewed ground rules and order of hearing.

At 5:18pm S. FitzGerald moved that the board go into Executive Session per ORS 192.660(2)(b) Discipline of Public Officers and Employees with no action in open session. K. Watson seconded. All in favor, motion carried.

IV. Executive Session per ORS 192.660(2)(h) Consult with Legal Counsel with no action in open session.

At 6:20pm J. Bibb moved that the board go into Executive Session per ORS 192.660(2)(h) Consult with Legal Counsel with no action in open session. S. FitzGerald seconded. All in favor, motion carried.

At 6:56pm S. FitzGerald moved that the board return to open session. J. Bibb seconded. All in favor, motion carried.

Action will be taken in open session at May 9th Board Meeting.

With no further discussion the meeting was adjourned 6:56pm

Minutes by: Michelle Rettke, Board Secretary

YAMHILL CARLTON SCHOOL DISTRICT NO. 1

BOARD OF DIRECTORS

Yamhill Carlton School District Board Room
120 N. Larch Place, Yamhill, OR 97148

Monday, May 6th, 2019

Budget Committee Meeting I- 7:00 p.m.

MINUTES

Board Members: Jami Egland, Susan FitzGerald, Tim Pfeiffer, Ken Watson, & Jack Bib

Budget Committee Members: Murray Paolo, Gordon Dromgoole, Erin Galyean, Kristy Edwards, and John Donahoo.

DO/Administration Staff: Superintendent Charan Cline, Business Manager Tami Zigler, Board Secretary Michelle Rettke, YCIS Associate Principal Chad Tollefson, YCES Principal Lauren Berg, YCHS Principal Cindy Schubert

Also Present: M. Gometz

I. Call to Order Budget Committee—7:05 p.m. by Budget Committee Past Chair, M. Paolo

II. Select Committee Chair

T. Pfeiffer motioned to appoint Murray Paolo as Chair and Erin Gaylean as Vice Chair. S. FitzGerald seconded. All in favor, motion carried.

III. Delivery of Budget Message

See attached Budget Message and Power Point Presentation

Align schedules to allow for shared staff between Intermediate and High School.

Designate \$10,000 for SRO type position on a part time basis

Continue to be aware of how declining enrollment affects the budget and address it proactively.

IV. Public Comment

J. Donahoo moved that the budget committee of the Yamhill Carlton School District #1 approve the budget for the 2019-2020 fiscal year in the amount of \$23,620,619 (General Fund = \$11,640,842, Special Revenue Funds = \$1,752,427, Debt Services Fund = \$5,357,850, Construction Fund = \$4,825,000, and Trust and Agency Funds = \$44,500). G. Dromgoole seconded. All in favor, motion carried.

J. Donahoo moved that the budget committee of the Yamhill Carlton School District #1 approve the property taxes for the 2019-20 fiscal year at the rate of \$4.7818 per \$1,000 of assessed value for the permanent rate tax levy and in the amount of \$1,549,504 for the general obligation bond levy. S. FitzGerald seconded. All in favor, motion carried.

With no further business to discuss, M. Paolo adjourned the meeting at 8:41 pm.

Minutes by: Michelle Rettke, Board Secretary

YAMHILL CARLTON SCHOOL DISTRICT NO.1

BOARD OF DIRECTORS

Yamhill Carlton School District Board Room
120 N Larch Place, Yamhill, OR 97148

Thursday, May 9th, 2019

Work Session – 6:45 PM

MINUTES

Board Members: Jami Egland, Tim Pfeiffer, Jack Bibb, S. FitzGerald and Ken Watson.

DO/Administration Staff: Superintendent Charan Cline, Board Secretary Michelle Rettke, Business Manager Tami Zigler, YCIS Principal Chad Tollefson, YCHS Principal Cindy Schubert, Athletic Director Matt Wiles, YCES Principal Lauren Berg and Food Service Manager Shiloh Ficek.

Also Present: P. Manson, G. Manson, G. Dromgoole, T. Reinmann, S. Reinmann, M. Glass, J. Miller, M. Gometz.

Call to Order Work Session – 6:45pm by Jami Egland

- I. Sub Committee Reports
 - a. Facilities and Transportation – Gym floor underway, smoke from laser cutter getting into girl's bathroom in CTE building, working on purchasing a mower, purchasing shades for doors in CTE building, Ag building: roof on – framing done – electrical and plumbing to begin work- roll up door coming Monday – should be completely done in about 2 weeks. Bond work: Wood floors being installed, hoops coming at end of May, working on punch list items with Turner, sound system and weight room.
 - b. Negotiations – Meeting with Classified, working on setting up dates with Licensed group
 - c. Board Policy (Susan) – Nothing to report
 - d. Curriculum (Ken) – Social Studies adoption (most positive of online option), working on continues improvement plan, Kagan Strategies discussion
 - e. Activities (Tim) – Nothing to report
 - f. Finance – Budget passed at meeting on May 6th
 - g. Communications – Nothing to report
 - h. Safety & Security – Charan is meeting with City of Yamhill Police to discuss options of SRO funding. Not enough money to fully fund but \$10,000 dedicated towards some services.

With no further discussion, the meeting adjourned 6:56 pm.

Minutes by: Michelle Rettke, Board Secretary

YAMHILL CARLTON SCHOOL DISTRICT NO.1

BOARD OF DIRECTORS

Yamhill Carlton School District Board Room
120 N Larch Place, Yamhill, OR 97148

Thursday, May 9th, 2019

Regular Session – 7:00 PM

MINUTES

Board Members: Jami Egland, Tim Pfeiffer, Jack Bibb, S. FitzGerald and Ken Watson.

DO/Administration Staff: Superintendent Charan Cline, Board Secretary Michelle Rettke, Business Manager Tami Zigler, YCIS Principal Chad Tollefson, YCHS Principal Cindy Schubert, Athletic Director Matt Wiles, YCES Principal Lauren Berg and Food Service Manager Shiloh Ficek.

Also Present: P. Manson, G. Manson, G. Dromgoole, T. Reimann, S. Reimann, M. Glass, J. Miller, M. Gometz.

- I. Flag Salute
- II. Called to order by Chair J. Egland at 7:00pm
- III. Individuals, Delegations, Recognition and Communications

Student Spotlight – YCHS – Valedictorians - Kjersti LeClair, Joey McGhehey, Taylor Reimann, Reilly Southard, and Josie Wright. Salutatorian Emma Prine

Public Comment – No Comment

- IV. Review of Agenda

J. Bibb motioned to approve agenda as presented. T. Pfeiffer seconded. All in favor, motion carried.

- V. Regular Session – Consent Agenda

K. Watson motioned to approve the consent agenda as modified with revisions to the Board Regular Session Minutes of 4/11/2019 to reflect GEO Challenge travel to occur in May 2019

- VI. Announcements and Report

- I. YCES – Lauren Berg – See Report – Started state testing, doing final Deibls at the end of the month, intervention review meeting happening now, continuing with mentor program next year (27 signed up)
- II. YCIS – Chad Tollefson – See Report – State testing happening at all grade levels, successful Jog-A-Thon, Oregon Symphony Woodwind Quartet came
- III. YCHS – Cindy Schubert & Matt Wiles – Options night was well attended, done with state testing, district & State track meets coming up, Softball likely going to State playoff.
- IV. Financial Report and List of Bills for April 2019 – 2019-2020 Budget was passed at Budget meeting on Monday night.

S. FitzGerald motioned to approve the financial report and list of bills for April 2019. K. Watson seconded. All in favor, motion carried.

- II. District Facilities – Brian King – nothing additional to report

- III. Superintendent's Report – Charan Cline – see report – Lauran Berg will be taking a job in McMinnville, Chad Tollefson moving to be principal at YCES and Matt Wiles will be taking principal position at YCIS.

VII. New Business

I. Reconsideration Committee (Action Item)

K. Watson advocated for M. McAllister to serve on Reconsideration Committee. T. Pfeiffer and J. Bibb supported.

T. Pfeiffer motioned to appoint M. McAllister and J. Oravetz to serve on Reconsideration Committee and D. Holliday to serve as Alternate. K. Watson Seconded. S. FitzGerald, J. Bibb in favor, J. Eglund Opposed. Motion Carried.

II. Resolution 2019-06 Surplus of YCHS Tiny House (Action Item)

Surplus to sale Tiny House. Profits will be used to purchase kit to build another. Board would like to have students doing the advertising to sale it as well.

S. FitzGerald motioned to approve Resolution 2019-06 Surplus of YCHS Tiny House. T. Pfeiffer seconded. All in in favor, motion carried.

III. YCSD/OSBA Scholarship Selection (Action Item)

J. Bibb motion to award the YCSD/OSBA Scholarships to Applicants #1 and Applicant #3 as presented on the YCSD/OSBA Scoring Sheet. K. Watson seconded. All in favor, motion carried.

IV. Employee Grievance (Action Item)

S. FitzGerald motion to Upload the Superintendent's Level Two Decision. J. Bibb seconded. J. Eglund and T. Pfeiffer in favor, K. Watson opposed. Motion carries.

V. Carlton Property Update

Property sale as closed and district has received funds.

VIII. Board of Directors Comments

J. Eglund – Carlton Fun Days – June 22nd – would like to do “Float” again this year

S. FitzGerald – Yamhill Derby Days – July – also do “float”

J. Bibb – Wish Lauren the best of luck in her next venture. Good luck to Chad and Matt on new assignments

S. FitzGerald – Has been great having Cindy and Lauren with us, will be missed.

Congrats to Chad and Matt

- IX. Executive Session per ORS 192.660(2)(i) Performance Evaluations of Public Officers and Employee with no action anticipated in Open Session.

At 7:49pm S. FitzGerald motioned that the board go into Executive session per ORS 192.660(2)(i) Performance Evaluations of Public Officers and Employees with no action anticipated in Open Session. T. Pfeiffer seconded. All in favor, motion carried.

AT 9:30pm S. FitzGerald motioned that the board return to open session. T. Pfeiffer seconded. All in favor, motion carried.

With no further discussion the meeting was adjourned at 9:31pm

Minutes by: Michelle Rettke, Board Secretary

**District Enrollment Report
May 2019**

		Female	Male	Total
Kindergarten		34	37	71
1st Grade		36	44	80
2nd Grade		33	48	81
3rd Grade		33	44	77
4th Grade		36	39	75
K- 4th Subtotal:		172	212	384
5th Grade		52	41	93
6th Grade		43	44	87
7th Grade		49	49	98
8th Grade		35	42	77
5th-8th Subtotal:		179	176	355
9th Grade		28	42	70
10th Grade		32	42	74
11th Grade		30	37	67
12th Grade		35	29	64
9th – 12th Subtotal:		125	150	275
District Total:		476	538	1014

District Enrollment for 2018/19 School Year

	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
YCES	336	337	337	337	332	332	329.75	331.75	332	
YCIS	325	310	312	311	310	305	304	304.75	304	
YCHS	277	277	280	281	278	281	279	274	275	
Alliance	88	89	94	94	99	105	105.25	105.5	103	
Total	1026	1013	1023	1023	1019	1023	1018	1016	1014	0

YCES Enrollment for 2018/19 School Year

	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
Kindergarten	68	70	71	71	70	70	68	67	66	
1st Grade	70	69	68	68	68	67	67.25	66.25	68.25	
2nd Grade	71	73	73	72	71	71	71	72	72.25	
3rd Grade	68	67	66	66	64	64	63.25	65.25	65.25	
4th Grade	59	58	59	60	59	60	60.25	61.25	60.25	
18/19 Total	336	337	337	337	332	332	329.75	331.75	332	0
17/18 Total	352.5	342.5	344.25	344.25	346.75	345.25	343.25	346.25	344	

16/17 Total	366	364	364	363	357	357	354	352	351	348
15/16 Total	379	380	382	379	385	381	378	379	376	376

YCIS Enrollment for 2018/19 School Year

	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
5th Grade	83	81	82	84	81	81	79.5	79.5	80.5	
6th Grade	79	78	79	75	76	74	74.75	73.75	73.75	
7th Grade	93	91	91	91	88	86	85.5	86.5	84.5	
8th Grade	70	60	60	60	65	64	64.25	65	65.25	
18/19	325	310	312	310	310	305	304	304.75	304	0
17/18 Total	323	321.5	318.5	314.5	315	310.5	309.5	308.5	303.5	
16/17 Total	317	320	319	318	313	313	314	312	311	311
15/16 Total	327	325	324	321	321	323	323	322	317	316

YCHS Enrollment for 2018/19 School Year

	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
9th Grade	68	68	69	70	70	72	71	69	70	
10th Grade	72	73	73	74	75	77	76	74	74	
11th Grade	68	68	68	68	67	68	68	67	67	
12th Grade	69	68	69	69	66	64	64	64	64	
18/19 Total	277	277	279	281	278	281	279	274	275	0
17/18 Total	312	307	305	304	303	300	300	297	296	
16/17 Total	326	325	325	322	318	324	324	323	318	311
15/16 Total	360	361	360	356	352	354	352	346	341	323

Alliance Academy Enrollment 2018/19

	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
Kindergart	4	4	4	5	5	5	5	5	5	
1st Grade	11	11	11	11	11	11	11.75	11.75	11.75	
2nd Grade	7	6	6	6	7	7	9	9	8.75	
3rd Grade	13	13	12	12	12	12	11.75	11.75	11.75	
4th Grade	15	14	14	14	14	14	14.75	14.75	14.75	
5th Grade	10	9	12	12	12	13	13.5	13.5	12.5	
6th Grade	13	14	14	15	15	15	14.25	14.25	13.25	
7th Grade	7	7	9	9	10	13	13.5	13.5	13.5	
8th Grade	8	11	12	10	13	15	12	12	11.75	
18/19 Total	88	89	94	94	99	105	105.5	105.5	103	0
17/18 Total	67.5	64	70.25	70.25	75.25	78.25	78.25	77.25	78.5	78.5
16/17 Total	50	49	49	48	49	49	52	52	62	61

15/16 Total	39	38	37	38	42	40	38	39	37	37
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Interdistrict Transfers 2018/19

	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
Brick & Mortar										
Incoming	95	95	95	95	95	95	95	95	95	
Outgoing	111	111	111	111	111	111	111	111	111	
Online										
Incoming	67	67	67	67	67	67	67	67	67	
Outgoing	12	12	12	12	12	12	12	12	12	
Total Incom	162	162	162	162	162	162	162	162	162	0
Total Outg	123	123	123	123	123	123	123	123	123	0

Synergy Reports STU408 & STU601

Yamhill Carlton School District Human Resources Board Report June 2019



New Hires for 2019-2020 School Year

Abigail Stevens - 3rd/4th Grade Blend (YCES)
Megan Beshears - 2nd Grade (YCES)
Jennifer Gonnuscio - 5th Grade (YCIS)

Transfers for 2019-2020 School Year

Ardis Bell - to 5th Grade @ YCIS
Kristen Nance - to 4th Grade @ YCES
Nicole Amuzu - to Alliance Academy

Resignation

Shiloh Ficek - Food Service Manager - Effective 6/28/2019

Open Positions of 2019-20 School Year

Associate Principal/Athletic Director (YCHS)
Food Service Manager (District)
.5 Language Arts Teacher (YCIS)
Instructional Assistant (Various)

Donations - May 2019

YCSD

YCTC Cougar Club

Playground chips (valued at \$200.00)

YCHS

Ryan Brethower	\$ 50.00	YCHS Rocketry
Fred Williams Jr.	\$ 100.00	Karen Williams Jones Scholarship
Susan Peterson	\$ 25.00	Karen Williams Jones Scholarship
Myrna Frieze	\$100.00	Karen Williams Jones Scholarship
Class of 73' Friends	\$100.00	Karen Williams Jones Scholarship
Nancy Bisbee	\$ 50.00	Class of 72' Scholarship
Julie & Craig Bush	\$100.00	Class of 72' Scholarship
John & Janet Kaiser	\$ 50.00	Class of 72' Scholarship
Joe McLeod	\$ 50.00	Class of 72' Scholarship
James & Caroline Skuzeski	\$100.00	Class of 72' Scholarship
Rodney & Maris Buxton	\$100.00	Class of 72' Scholarship
Mid Columbia Bus Co	\$500.00	Mid Columbia Bus Scholarship
Henson Orthodontics	\$100.00	Girls Basketball Fund
Better Series LLC	\$ 250.00	YC Cheer team

Yamhill Carlton Elementary School

Principal Report - June 2019

As we come to the end of another school year, there is so much to reflect upon. The YCES staff has worked really hard to solidify new systems this year, regularly adjusting our set-up and instruction to reflect student need. We built up our capacity for Growth Mindset and the importance of relationship-building with students to help each child feel safe, welcomed, and able to take risks at school. We've opened the doors to our classrooms to create a learning environment amongst the staff that has built up each individuals' capacity in the classroom. I am grateful for the amazing people with which I work, and I leave knowing they will continue this greatness.

RTI Process & Academics

We have worked hard at YCES in building systems to support our students in their academic work. The focus of our work has been literacy, but staff is ready to build up the same system for math. One key component has always been gathering data so that we know exactly where our students are in their learning and what adjustments need to be made.

Our annual data has been gathered for Core Instructional content in both Reading and Math. Here is where each grade-level has ended the school year:

DIBELS 2018-2019	Fall	Winter	Spring
Kindergarten	40%	50%	81%
1 st Grade	52%	53%	54%
2 nd Grade	67%	75%	72%
3 rd Grade	65%	72%	74%
4 th Grade	61%	73%	71%

easyCBM 2018-2019	Fall	Winter	Spring
Kindergarten	72%	79%	79%
1 st Grade	70%	55%	64%
2 nd Grade	81%	81%	67%
3 rd Grade	73%	72%	78%
4 th Grade	78%	71%	59%

It is exciting to see some strong numbers in our data that show how well our efforts are making gains for students. It's also important to note the areas where students dropped and growth still needs to happen. This also allows us to have some reflective planning on areas and grade-levels where we still need some improvement. The continued goal will be to strengthen the areas that are not making gains by utilizing the systems and routines that we know are helping students.

May ADA:

Kindergarten -89.96%
 First Grade -95.44%
 Second Grade -94.77%

Third Grade -94.78%
 Fourth Grade -94.75%
School Wide -93.94%

YCIS June Board Report

Ending of the School Year:

It's hard to believe that the school year is over once again. The last few weeks were a blur as staff and students bustled with activity. I will attempt to capture some of the highlights of the end of the year at YCIS.

We had a great visit from the fourth graders when they came over for their transition visit. They toured the school and classrooms and got to hear from teachers what fifth grade is all about. Their visit included a snack in the cafeteria as students learned about the YCIS lunch and recess process.

Several culminating projects took place. The sixth grade did an amazing job presenting at the Teen Activism Fair in the gym. Students presented their research to students, staff, and parents who stopped by to listen. Another fantastic event was the second annual fifth grade Wax Museum. Students dressed as the person from history that they researched, and then waited in a frozen state until coming to life at the push of a button to present facts about the historical figure they represented. Both events brought students, staff, and parents together to celebrate the tremendous work and learning of these students.

Many field trips took place over the course of the past few weeks. Students had a blast at Wings and Waves Waterpark, earning the trip through Jog-A-Thon fundraising efforts. Fifth graders took a trip to the Wax Museum to celebrate the end of the year and to see real wax figures. Sixth grade went bowling, and seventh grade went on their annual beach trip. Finally, our eighth graders went to Oaks Park to celebrate the end of their middle school journey and the beginning of their high school adventure.

Students, parents, and staff all enjoyed eighth grade promotion day. The day consisted of promotion practice, and then a wonderful eighth grade dessert in the afternoon. At the dessert teachers handed out academic, attendance, and class awards to students. All enjoyed the fantastic slideshow of our eighth grade class. Promotion itself took place that evening and went well. Our staff speakers and presenters helped make it a great event, and students got to take home a wonderful plaque to commemorate the day.

We also had a chance to honor our three retirees in an assembly. Kathy Bales, Kathy McMurray, and Sigrid Guinn are all valued members of the YCIS family. We look to their years of service to our school and district with gratitude. We know they will enjoy the next phase of their lives.

Attendance:

September Attendance Rates		October Attendance Rates		November Attendance Rates	
19 days of school		22 days of school		16 Days of School	
5th Grade	95.00%	5th Grade	95.91%	5th Grade	95.13%
6th Grade	95.75%	6th Grade	93.71%	6th Grade	94.39%
7th Grade	91.82%	7th Grade	90.59%	7th Grade	87.70%
8th Grade	94.96%	8th Grade	90.85%	8th Grade	89.15%
Total	94.27%	Total	92.71%	Total	91.50%

December Attendance Rates		January Attendance Rates		February Attendance Rates	
15 days of school		18 days of school		16 Days of School	
5th Grade	92.77%	5th Grade	91.01%	5th Grade	90.63%
6th Grade	94.64%	6th Grade	95.43%	6th Grade	94.12%
7th Grade	88.42%	7th Grade	90.01%	7th Grade	89.53%
8th Grade	90.71%	8th Grade	89.65%	8th Grade	89.60%
Total	91.50%	Total	91.43%	Total	90.89%

March Attendance Rates		April Attendance Rates		May Attendance Rates	
16 days of school		22 days of school		21 Days of School	
5th Grade	92.28%	5th Grade	93.82%	5th Grade	93.87%
6th Grade	92.69%	6th Grade	94.38%	6th Grade	96.40%
7th Grade	89.73%	7th Grade	89.59%	7th Grade	89.00%
8th Grade	87.84%	8th Grade	90.66%	8th Grade	91.13%
Total	90.62%	Total	92.02%	Total	92.44%

Current Enrollment:5th: 806th: 737th: 898th: 74**Total: 316**

**Yamhill Carlton School District Board Report
June 2019 Board Meeting
Yamhill Carlton High School**

I

Upcoming Events

August 14: Registration

August 19: Fall Sports Begin

Donations

Ryan Brethower	\$ 50.00	YCHS Rocketry
Fred Williams Jr.	\$ 100.00	Karen Williams Jones Scholarship
Susan Peterson	\$ 25.00	Karen Williams Jones Scholarship
Myrna Frieze	\$100.00	Karen Williams Jones Scholarship
Class of 73' Friends	\$100.00	Karen Williams Jones Scholarship
Nancy Bisbee	\$ 50.00	Class of 72' Scholarship
Julie & Craig Bush	\$100.00	Class of 72' Scholarship
John & Janet Kaiser	\$ 50.00	Class of 72' Scholarship
Joe McLeod	\$ 50.00	Class of 72' Scholarship
James & Caroline Skuzeski	\$100.00	Class of 72' Scholarship
Rodney & Maris Buxton	\$100.00	Class of 72' Scholarship
Mid Columbia Bus Co	\$500.00	Mid Columbia Bus Scholarship
Henson Orthodontics	\$100.00	Girls Basketball Fund
Better Series LLC	\$ 250.00	YC Cheer team

FFA

ASPIRE

On May 1, ASPIRE was host to the first *Options after High School Night* event for all grades. In past years, a similar event was aimed at juniors and their parents only.

We revamped this annual spring event to include speakers from the University of Oregon Admissions Department and Willamette Promise. Also on hand at display tables around the room were representatives from George Fox, Pacific University, Portland State, Portland Community College, Chemeketa Community College and Oregon Tech as well as the Oregon National Guard and the U.S. Navy. Several ASPIRE mentors and the program coordinator were also on hand.

The evening began with light fare and door prizes, donated by local businesses. It was followed by an interactive College Admissions Game that involved students and parents. It was a great success, with more than 50 in attendance! This is more than double the number in previous years! Following the event, we received many positive comments from participants and attendees.

The end-of-the-year wrapped up with 64 percent of seniors active in ASPIRE. There are 24 juniors and 2 sophomores as well.

Seniors reported receiving 60 college acceptance letters from OSU, PSU, George Fox, University of Oregon, OIT, Linfield, Pacific University, Boise State, Bradley University, Southern Illinois University, St. Louis University, Pacific Lutheran College, Concordia, Willamette University, Hawaii University, College of Southern Idaho, BYU, and Point Loma in California.

The amount of scholarships and grants offered and reported by graduating seniors is \$1.6 million. The amount accepted is approximately \$1.1 million. Of these, 32 are Oregon Promise Grant candidates, who will have their tuition covered at an in-state community college. As well, 12 students were selected as Chemeketa Scholars, meaning their tuition will be paid for at Chemeketa Community College.

The year-to-date hours that volunteers have spent working with YC students is 300.

The 2018-2019 school year ended with six mentors. Most are planning to return to ASPIRE mentoring next school year.

YC ASPIRE touched 680 people during the school year. This includes scheduled and drop-in student visits as well as individuals who attended various college- and career- ready events at the school.

In Mid-May, volunteers met with the ASPIRE Coordinator and YCHS principal to strategize how to reach more students and parents during the next school year.

Principal's Report

SENIORS:

We celebrated our Seniors this past week with Friday, the Seniors had a busy day with Senior Breakfast, visiting the Intermediate/ Elementary Schools, Senior Assembly, Senior Lunch, and Rehearsal. Our graduation rate is 81% if students who have remaining tasks to complete, follow through.

NAVIANCE:

We are implementing a program called Naviance next year in Freshman Success classes. The plan is to expand it to 7th & 8th grades for career exploration, strengths/interest surveys, and goal setting. We will also extend Naviance's use to 10th, 11th, and 12th grades where career/college exploration and goal setting will continue.. Naviance is a comprehensive college and career readiness solution that helps districts and schools align student strengths and interests to postsecondary goals, improving student outcomes and connecting learning to life.

ACCREDITATION REPORT:

YCHS received the Accreditation Report and a few things that are worth noting are:

1. YCHS operates in close alignment with Yamhill Carlton School Board policies and practices committed to support institutional effectiveness. Written board policies and procedures provide clarity for YCHS leadership planning and short and long-range resource management.
2. The school learning culture reflects the emphasis on building effective relationships, personalization of education programs, and student engagement. From stakeholder interviews, students have developed close relationships with their teachers as a circle of support, and teachers connect with students as a whole person.
3. YCHS would benefit from increasing its efforts to engage parent stakeholders and ensuring that parent-involved activities, such as the site council, remain active and require their participation.
4. YCHS should continue its work in the direction of board mandated proficiency education. It was evident from meetings with students, staff, and parents that there is confusion, varied perspectives, and practices with proficiency grading.

5. YCHS would benefit from more formal structures to evaluate progress on programs and processes, and to provide guidance on adjusting those programs and processes.
6. YCHS has a culture of shared leadership which provides an environment for education that empowers staff to be creative and resourceful.

SPRING SPORTS:

Tremendous success for our Track Team this spring with a variety of students making it to the podium. Our YC boys placed 15th and the YC girls placed 10th. We had one State Champion, Sadie Horne, who placed first in the Shot Put. Our Girls Softball team made it to the second round of playoffs on what was considered a building year.

Attendance

<u>May</u>	
<u>Grade</u>	<u>Percent Present</u>
<u>9</u>	<u>94.02</u>
<u>10</u>	<u>94.39</u>
<u>11</u>	<u>93.13</u>
<u>12</u>	<u>92.11</u>
<u>Total</u>	<u>93.45</u>
<u>YTD</u>	<u>94.26</u>

Financial Report
Yamhill-Carlton School District

For Period Ending May 31, 2019

General Fund - Revenue & Expenditures by Object Code

	Working Budget	Actual	Projected	Total	Balance Over/(Under)	% received
Revenue:						
1111 Current Taxes	3,125,000	3,032,804	92,196	3,125,000	-	97.0%
1112 Prior Taxes	45,000	116,395	-	116,395	71,395	258.7%
1113 Revenue in Lieu of Taxes	-	3,712	-	3,712	3,712	3712.5%
1114 Revenue in Lieu of Taxes	-	8,080	-	8,080	8,080	8080.0%
1190 Interest on Tax Collection	-	11,299	-	11,299	11,299	11299.3%
1312 Tuition From Other School Districts	-	-	125,000	125,000	125,000	0.0%
1330 Summer School Tuition	2,000	3,205	-	3,205	1,205	160.3%
1411 Transportation Fees from Individuals	-	143	-	143	143	143.1%
1510 Interest	15,000	88,834	-	88,834	73,834	592.2%
1710 Admissions	10,000	11,287	1,296	12,583	2,583	112.9%
1711 Athletic Sign Up	-	-	-	-	-	0.0%
1740 Student Fees (Athletics)	28,000	25,515	5,545	31,060	3,060	91.1%
1790 Other Curricular Activities	-	4,797	-	4,797	4,797	4796.8%
1910 Rentals	3,600	3,659	-	3,659	59	101.6%
1920 Contributions & Donations	10,000	-	10,000	10,000	-	0.0%
1950 Reimbursements	-	-	-	-	-	0.0%
1960 Recovery of Prior Year Expenditures	-	6,604	-	6,604	6,604	6604.2%
1990 Miscellaneous Revenue	10,000	35,888	-	35,888	25,888	358.9%
Total Local Revenue	3,248,600	3,352,224	234,037	3,586,260	337,660	103.2%
2101 County School Fund	-	-	-	-	-	0.0%
2102 ESD Apportionment	170,000	127,500	42,500	170,000	-	75.0%
2199 Other Intermediate Sources	-	-	-	-	-	0.0%
Total Intermediate Revenue	170,000	127,500	42,500	170,000	-	75.0%
3101 State School Fund Grant	6,508,899	6,468,179	-	6,468,179	(40,720)	99.4%
3103 Common School Fund	94,475	56,798	56,798	113,596	19,121	60.1%
3199 SSF-High Cost Disability & SHS Grant	-	118,707	-	118,707	118,707	118707.0%
3299 Other Restricted Grants in Aid	-	-	-	-	-	0.0%
Total State Revenue	6,603,374	6,643,684	56,798	6,700,482	97,108	100.6%
4700 Federal Grants in Aid	-	-	-	-	-	0.0%
Total Federal Revenue	-	-	-	-	-	0.0%
5200 Transfers	-	-	-	-	-	0.0%
5300 Sale of Fixed Assets/Ins Proceeds	-	-	-	-	-	0.0%
5400 Beginning Fund Balance	1,000,000	994,721	0	994,721	(5,279)	99.5%
Total Other Sources	1,000,000	994,721	0	994,721	(5,279)	99.5%
Total Revenues	\$ 11,021,974	\$ 11,118,129	\$ 333,335	\$ 11,451,464	\$ 429,490	100.9%
Expenditures:						
	Working Budget	Actual	Encumbrances	Total	Balance (Over)/Under	% spent (actuals)
100 - Salaries	4,993,280	4,388,433	580,654	4,969,087	24,193	87.9%
200 - Benefits	2,737,214	2,176,191	314,185	2,490,375	246,839	79.5%
300 - Purchased Services	2,048,586	1,785,411	249,698	2,035,108	13,478	87.2%
400 - Supplies & Materials	414,490	275,800	18,661	294,461	120,029	66.5%
500 - Capital Outlay	15,500	22,518	-	22,518	(7,018)	145.3%
600 - Other Objects	196,940	155,262	45	155,306	41,634	78.8%
700 - Transfers	215,964	215,964	-	215,964	-	100.0%
800 - Operating Contingency	400,000	-	-	-	400,000	0.0%
Total Expenditures	\$ 11,021,974	\$ 9,019,578	\$ 1,163,242	\$ 10,182,820	\$ 839,154	81.8%

For Period Ending May 31, 2019

Special Revenue Funds - Revenue & Expenditures by Object Code

	Budget	Actual	Encumbrances	Total	Balance Over/(Under)	% received
Revenue:						
1000 Local Revenue	662,163	165,837	496,326	662,163	0	25.0%
2000 Intermediate Revenue	2,737	1,369	1,369	2,737	-	50.0%
3000 State Revenue	191,755	15,573	176,182	191,755	0	8.1%
4000 Federal Revenue	676,840	184,692	492,148	676,840	-	27.3%
5200 Interfund Transfers	85,500	85,500	-	85,500	-	100.0%
5400 Beginning Fund Balance	191,677	354,779	0	354,779	163,102	185.1%
Total Revenues	\$ 1,810,671	\$ 807,749	\$ 1,166,025.12	1,973,774	163,103	44.6%
Expenditures:						
					Balance (Over)/Under	% spent
100 - Salaries	375,752	302,900	59,856	362,756	12,996	80.6%
200 - Benefits	298,364	222,642	43,036	265,678	32,686	74.6%
300 - Purchased Services	252,696	54,020	25,644	79,664	173,032	21.4%
400 - Supplies & Materials	814,104	195,896	12,360	208,256	605,848	24.1%
500 - Capital Outlay	61,155	42,324	-	42,324	18,831	69.2%
600 - Other Objects	8,600	4,852	1,084	5,936	2,664	56.4%
700 - Transfers	-	-	-	-	-	0.0%
800 - Reserved for Next Yr	-	-	-	-	-	0.0%
Total Expenditures	\$ 1,810,671	\$ 822,634	141,980	\$ 964,614	\$ 846,057	45.4%

CASH FLOW - General Fund 2018-2019		JULY ACTUAL	AUG ACTUAL	SEPT ACTUAL	OCT ACTUAL	NOV ACTUAL	DEC ACTUAL	JAN ACTUAL	FEB ACTUAL	MAR ACTUAL	APR ACTUAL	MAY ACTUAL	JUNE ACTUAL	TOTAL ACTUAL	BUDGET	DIFFERENCE BGT-ACT	% RECEIVED
Current Year Taxes	1111	-	-	-	-	2,447,566	443,001	32,437	15,695	69,171	12,058	12,877	-	3,032,804	3,125,000	92,196	97.05%
Prior Year Taxes	1112	-	-	71,616	6,234	19,618	4,244	3,722	3,459	1,757	3,019	2,727	-	116,395	45,000	(71,395)	258.66%
Revenue in Lieu of Taxes	1113	-	-	-	192	961	-	-	-	2,212	-	347	-	3,712	-	(3,712)	3712.45%
Interest on Tax Collections	1190	-	-	1,831	1,041	3,244	798	777	1,085	618	1,010	896	-	11,299	-	(11,299)	11299.31%
Tuition from other school districts	1312	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.00%
Summer School Tuition	1330	3,130	-	75	-	-	-	-	-	-	-	-	-	3,205	2,000	(1,205)	160.25%
Tuition from other Oregon Districts	1332	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.00%
Transportation Fees	1400	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.00%
Transportation Fees frm Individuals	1411	-	-	-	-	-	102	-	-	-	-	41	-	143	-	(143)	143.14%
Interest Income	1510	3,944	7,196	4,047	3,978	5,639	11,639	12,043	10,237	10,891	10,146	9,075	-	88,834	15,000	(73,834)	592.23%
Admissions	1710	-	-	-	-	-	-	-	-	-	-	11,287	-	11,287	10,000	(1,287)	112.87%
Athletic Sign Up	1711	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.00%
Participation Fees	1740	-	-	-	-	-	-	-	-	-	-	25,515	-	25,515	28,000	2,485	91.13%
Athletic Reimbursements	1790	-	3,244	-	-	-	-	412	-	-	1,140	-	-	4,797	-	(4,797)	4796.84%
Rentals	1910	300	300	459	300	300	300	350	100	350	300	300	300	3,659	3,600	(59)	101.64%
Donations	1920	-	-	-	-	-	-	-	-	-	-	-	-	-	10,000	10,000	0.00%
Reimbursement	1950	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.00%
Recovery of PY Expenditure	1960	-	1,986	-	4,618	-	-	-	-	-	-	-	-	6,604	-	(6,604)	6604.20%
Recovery of CY Expenditure	1961	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.00%
Miscellaneous	1990	-	-	558	93	5,675	27,942	13	199	957	102	205	145	35,888	10,000	(25,888)	358.88%
County School Fund	2101	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.00%
ESD Apportionment	2102	-	-	-	-	-	-	42,500	42,500	-	42,500	-	-	127,500	170,000	42,500	75.00%
State School Fund Grant	3101	1,062,248	530,805	530,805	530,805	532,717	532,717	529,331	532,717	571,047	568,022	546,965	-	6,468,179	6,508,899	40,720	99.37%
High Cost Disability Grant	3199	-	-	-	-	-	-	-	-	-	-	118,707	-	118,707	-	(118,707)	118707.02%
Common School Fund	3103	-	-	-	-	-	-	-	-	56,798	-	-	-	56,798	94,475	37,677	60.12%
Grants in aid from Fed Gov't	4700	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.00%
E Rate	3299	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.00%
Sale of Fixed Assets	5300	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.00%
Beginning Fund Balance	5400	994,721	-	-	-	-	-	-	-	-	-	-	-	994,721	1,000,000	5,279	99.47%
TOTAL REVENUE		2,064,343	543,531	609,390	547,261	3,015,719	1,020,744	621,585	605,992	713,800	638,297	728,943	445	11,110,049	11,021,974	(88,075)	100.80%
EXPENDITURES																	
																	% SPENT
Salaries	100	92,078	100,732	414,220	428,654	418,575	416,642	417,351	421,802	422,695	423,823	418,733	413,129	4,388,433	4,993,280	604,847	87.89%
Payroll Costs	200	43,182	46,420	202,380	210,325	208,376	206,707	207,113	206,702	211,019	216,311	208,952	208,702	2,176,191	2,737,214	561,023	79.50%
Purchased Services	300	16,108	88,406	90,457	247,373	214,131	178,485	115,349	240,021	161,508	110,613	242,179	80,780	1,785,411	2,048,586	263,175	87.15%
Supplies	400	7,480	20,888	46,012	46,543	24,065	19,525	8,639	17,216	12,796	14,660	41,296	16,679	275,800	414,490	138,690	66.54%
Equipments	500	-	5,000	-	-	-	-	-	-	8,000	-	9,518	-	22,518	15,500	(7,018)	11.43%
Other objects	600	125,889	6,014	259	2,370	7,204	11,021	704	314	365	653	371	96	155,262	196,940	41,678	71.89%
Transfers	700	-	-	-	-	-	200,964	-	-	-	-	-	15,000	215,964	215,964	-	53.99%
Contingency															400,000	400,000	0.00%
TOTAL EXPENDITURES		284,738	267,460	753,329	935,264	872,352	1,033,343	749,156	886,056	816,383	766,061	921,050	734,386	9,019,578	11,021,974	2,002,396	81.83%
PROFIT/LOSS		1,779,605	276,071	(143,938)	(388,003)	2,143,367	(12,600)	(127,571)	(280,064)	(102,583)	(127,765)	(192,108)	(733,941)	2,090,471		2,090,471	
RUNNING TOTAL			2,055,676	1,911,738	1,523,735	3,667,102	3,654,502	3,526,931	3,246,867	3,144,284	3,016,519	2,824,412	2,090,471				

Yamhill Carlton School District
Grant Information
Fiscal Year 2018-2019
For Period Ending May 31, 2019

FUND	DESCRIPTION	GRANT AWARD	REVENUE	EXPENDITURE	ENCUMBRANCE	BALANCE
201	TITLE I	91,558.00	9,839.08	78,351.62	13,196.23	10.15
203	SPR&I	1,779.00	-	1,240.50	489.57	48.93
204	TITLE II-A	37,621.00	-	11,716.36	18,809.44	7,095.20
205	IDEA ASSESSMENT	2,122.00	-	-	-	2,122.00
206	IDEA PART B 611	291,760.00	-	117,457.98	22,483.63	151,818.39
207	IDEA PART B 619	800.00	1,791.48	-	-	800.00
215	MEDICAID ADMIN CLAIMING (MAC)	2,410.36	2,410.36	2,410.36	-	-
218	ORTII	2,737.00	1,368.50	-	-	2,737.00
220	ASD -VIA WILLAMETTE ESD	5,000.00	2,744.94	-	-	5,000.00
225	FORD FAMILY MINI MILL	47,769.00	47,769.00	42,861.54	99.56	4,807.90
227	READY FOR KINDERGARTEN	-	-	200.68	-	(200.68)
228	YCCO - KINDERGARTEN TRANSITION	3,074.29	-	3,074.29	-	-
229	HB3499 EL GRANT	1,106.93	-	1,106.93	-	-
233	MEASURE 98	132,000.00	-	127,066.88	18,267.78	(13,334.66)
236	STOEBNER	1,377.09	1,377.09	1,377.09	-	-
237	DYSLEXIA TRAINING	-	(157.60)	-	-	-
238	CAREER PATHWAYS	15,467.44	4,974.44	15,400.20	-	67.24
239	MEASURE 99 - OUTDOOR SCHOOL	19,840.00	-	15,622.00	4,218.00	-
LOCAL/STATE/FED GRANTS		656,422.11	72,117.29	417,886.43	77,564.21	160,971.47
230 MISCELLANEOUS GRANTS		GRANT AWARD	REVENUE	EXPENDITURE	ENCUMBRANCE	BALANCE
000	MISCELLANEOUS GRANTS	4,086.80	3,021.94	3,598.69	251.80	236.31
701	ART - YCEF	2,100.00	2,100.00	2,100.29	-	(0.29)
700	UNITED WAY	261.94	261.94	-	-	261.94
850	OSBA SCHOLARSHIP - BOARD	5,000.00	5,000.00	-	-	5,000.00
401	ASPIRE	2,000.00	2,000.00	2,000.00	-	-
800	YCCA AFTERSCHOOL	1,000.00	1,000.00	984.43	-	15.57
801	YC WRESTLING	2,000.00	2,000.00	2,284.30	-	(284.30)
802	AG DRONE PROJECT	4,493.33	8,523.33	4,493.33	-	-
803	VETERANS LEGACY GRANT	500.00	500.00	-	-	500.00
804	YCEF ACADEMIC COACH	2,008.00	2,008.00	2,008.00	-	-
805	YCEF SPANISH MINI GRANT	643.35	643.35	643.35	-	-
806	YCEF SPEED STACK	799.00	799.00	799.00	-	-
807	CTE DONATIONS - TAC BOARDS	1,042.70	1,042.70	1,042.70	-	-
808	YCEF - BENCHES	570.03	570.03	128.43	-	441.60
809	STUDENT TEACHING	900.00	1,800.00	187.25	-	712.75
810	YCES SPORTS COURT	7,000.00	7,000.00	-	-	7,000.00
811	YCEF - GEO CHALLENGE	500.00	500.00	500.00	-	-
812	CTSO GRANT - FFA	1,000.00	1,000.00	-	-	1,000.00
SUB TOTAL MISC GRANTS		35,905.15	39,770.29	20,769.77	251.80	14,883.58
FUND	OTHER SPECIAL REVENUE	BUDGET	REVENUE	EXPENDITURE	ENCUMBRANCE	BALANCE
250	FOOD SERVICE	391,005.00	291,849.05	305,364.57	44,365.70	41,274.73
265	EARLY RETIREMENT	60,000.00	115,704.86	46,339.30	5,979.50	7,681.20
266	PROFESSIONAL DEVELOPMENT	40,000.00	42,408.13	30,231.65	13,695.17	(3,926.82)
280	STUDENT BODY ACCOUNTS	550,000.00	245,899.26	2,042.64	-	547,957.36
SUB TOTAL OTHER SPECIAL REVENUE		1,041,005.00	695,861.30	383,978.16	64,040.37	592,986.47
TOTAL ALL 200 FUNDS		1,733,332.26	807,748.88	822,634.36	141,856.38	768,841.52

Revenues	Actuals Jul-15	Actuals Aug-15	Actuals Sep-15	Actuals Oct-15	Actuals Nov-15	Actuals Dec-15	Actuals Jan-16	Actuals Feb-16	Actuals Mar-16	Actuals Apr-16	Actuals May-16	Actuals Jun-16	Totals	Budget	Diff Bud/Act	% Recd
Local Sources																
250.0000.1510 Interest	1	1	1	1	2	2	2	0	0	0	0	-	11	-	11	0%
250.0000.1610 Daily Sales	222	855	11,942	9,688	9,065	8,959	9,526	6,963	9,430	8,318	7,160	1,966	84,094	99,350	(15,256)	85%
250.0000.1620 Adult Sales	-	-	478	579	466	265	478	330	539	517	-	-	3,651	1,000	2,651	365%
250.0000.1630 Spec Func	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0%
250.0000.1622 Ala Carte	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0%
250.0000.1960 Recov PY	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0%
250.0000.1990 Misc	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0%
Total Local Sources	223	857	12,421	10,268	9,532	9,226	10,006	7,293	9,969	8,835	7,160	1,966	87,756	100,350	(12,594)	87%
State Sources																
250.0000.3101 State School	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0%
250.0000.3201 School Lunch	-	-	-	-	-	-	3,386	-	-	-	-	-	3,386	4,000	(614)	85%
250.0000.3202 Farm to School	-	-	-	-	-	-	-	-	-	-	-	-	-	7,768	(7,768)	0%
250.0000.3299 ODE Breakfast	-	-	1,938	688	-	-	-	1,369	357	-	861	-	5,213	6,887	(1,674)	76%
Total State Sources	-	-	1,938	688	-	-	3,386	1,369	357	-	861	-	8,599	18,655	(10,056)	46%
Federal Sources																
250.0000.4505 Nat'l Lunch	-	-	-	14,079	16,987	12,603	11,374	13,910	12,206	12,081	17,431	-	110,672	164,500	(53,828)	67%
250.0000.4509 Summer Food	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0%
250.0000.4511 Nat'l Breakfast	-	-	-	3,803	4,713	3,699	3,245	3,835	3,406	3,511	5,502	-	31,714	50,500	(18,786)	63%
ODE Lunch Reimbursement	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0%
USDA Commodities	-	-	-	-	-	-	-	-	-	-	-	27,931	27,931	32,000	(4,069)	87%
Total Federal Sources	-	-	-	17,883	21,700	16,302	14,619	17,745	15,612	15,592	22,933	27,931	170,316	247,000	(76,684)	69%
Other Resources																
Transfer from General Fund	-	-	-	-	-	-	-	-	-	-	-	15,000	15,000	15,000	-	100%
Beginning Fund Balance	10,178	-	-	-	-	-	-	-	-	-	-	-	10,178	10,000	178	102%
Total Other Resources	10,178	-	-	-	-	-	-	-	-	-	-	15,000	25,178	25,000	178	101%
Total Monthly Revenue	10,401	857	14,359	28,839	31,231	25,528	28,011	26,406	25,938	24,427	30,954	44,897	291,849	391,005	(99,156)	75%
Cumulative Revenue	10,401	11,258	25,617	54,456	85,687	111,215	139,226	165,632	191,570	215,997	246,952	291,849				
Expenditures													Totals	Budget	Diff	% Spent
Salaries	-	-	9,710	9,841	9,890	9,866	9,945	9,842	9,853	10,069	10,060	9,920	98,995	126,906	(27,911)	78%
Employee Benefits	-	-	5,736	5,703	5,776	5,761	5,782	5,749	5,753	5,817	5,825	5,759	57,663	79,299	(21,637)	73%
Purchased Services	-	-	106	2,773	932	1,334	310	923	1,385	309	1,404	1,770	11,246	3,600	7,646	312%
Supplies	-	-	19,015	12,040	12,621	7,656	12,538	11,964	7,284	10,054	8,897	30,540	132,610	160,600	(27,990)	83%
Capital Outlay	-	-	-	-	-	-	-	-	-	-	-	-	-	12,000	(12,000)	0%
Insurance/Fees/Other	2,090	-	480	-	1,367	-	509	26	213	167	-	-	4,852	8,600	(3,748)	56%
Transfers														-	-	
Contingency														-	-	
Unappropriated Ending Bal																
Total Monthly Expenditures	2,090	-	35,048	30,358	30,585	24,617	29,083	28,504	24,489	26,417	26,186	47,989	305,365	391,005	(85,640)	78%
Cumulative Expenditures	2,090	2,090	37,138	67,495	98,080	122,697	151,780	180,284	204,773	231,189	257,376	305,365				
Profit/Loss	8,311	9,168	(11,521)	(13,039)	(12,393)	(11,482)	(12,554)	(14,652)	(13,202)	(15,192)	(10,424)	(13,516)				

**YAMHILL CARLTON SD
DEBT SERVICE FUNDS
2018-2019**

FUND 300	General Obligation Bonds												
Debt Service (300)	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
Revenue	-	673	18,500	2,961	1,172,881	212,593	16,974	8,802	34,018	6,961	11,307	-	1,485,670
Expenses	-	-	-	-	279,322	-	(10)	-	-	500	1,226,906	-	1,506,718
Profit/(Loss)	-	673	19,173	22,134	915,693	1,128,287	1,145,270	1,154,072	1,188,090	1,194,551	(21,048)	(21,048)	
Budgeted Transfer	-												-
Beginning Fund Balance	87,040												87,040
Debt Service Payments													
GO BOND 2015 Series					19,150						636,559		
GO BOND 2016 Series					260,375						590,375		
Total Obligations					279,525						1,226,934	-	1,506,459
Projected Tax Collections												52,000	52,000
Projected Ending Fund Balance													117,992

FUND 301	QZAB												
Debt Service (301)	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
Revenue	-	1,431	3,350	-	3,118	130,464	1,501	1,786	3,607	1,920	1,368	-	148,546
Expenses	142,463	-	-	-	-	-	-	-	-	-	-	-	142,463
Profit/(Loss)	(142,463)	(141,032)	(137,682)	(137,682)	(134,564)	(4,100)	(2,599)	(813)	2,795	4,715	6,083	6,083	
Budgeted Transfer	-												-
Beginning Fund Balance	17,652												17,652
Projected Ending Fund Balance													25,435
Debt Service Payments	142,463												142,463
Projected Revenue												1,700	1,700

Fund 302	PERS Liability												
Debt Service (302)	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
Revenue	18,063	18,575	75,595	75,381	75,320	75,848	76,152	76,651	80,870	81,263	79,431	79,537	812,687
Expenses	-	-	-	-	-	140,686	-	-	-	-	-	-	140,686
Profit/(Loss)	18,063	36,638	112,233	187,614	262,934	198,095	274,248	350,899	431,769	513,033	592,464	672,001	
Budgeted Transfer	-												-
Beginning Fund Balance	526,120												526,120
Ending Fund Balance													1,198,120
Debt Service Payments						140,686						805,686	946,372

**YAMHILL CARLTON SD
CAPITAL PROJECTS FUNDS
CASH FLOW REPORT
2018-2019**

**Note: There are no future expenditures or revenues shown on this report. This is showing actual cash flow only.*

Fund 400 Building Fund (CET)														
Building Fund (400)	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total	Budget
Revenue	14,543	17,171	4,951	3,332	4,935	290	12,169	12,354	17,825	541	1,825	4,786	94,720	225,000
Expenses	8,085	33,804	44,367	223	13,748	342	3,401	69,633	15,832	10,427	78	11,467	211,406	225,000
Profit/(Loss)	6,458	(10,175)	(49,592)	(46,483)	(55,295)	(55,348)	(46,580)	(103,859)	(101,865)	(111,751)	(110,004)	(116,686)		
Budgeted Transfer	(30,000)												(30,000)	
Beginning Fund Balance	298,713												298,713	
													Fund Balance	
													152,027	

Fund 405 Bond Projects 2016														
Bond Projects Fund (405)	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total	Budget
Revenue	11,670	8,697	153,092	3,851	5,257	1,412	3,941	2,645	8,525	2,603	2,107	-	203,800	4,709,900
Expenses	37,270	1,237,902	1,641,919	1,048,950	864,697	524,949	497,218	58,039	24,828	364,013	44,167	31,845	6,375,798	4,709,900
Profit/(Loss)	(25,601)	(1,254,806)	(2,743,634)	(3,788,732)	(4,648,173)	(5,171,709)	(5,664,986)	(5,720,380)	(5,736,683)	(6,098,093)	(6,140,153)	(6,171,998)		
Budgeted Transfer	2,108,827												2,108,827	
Beginning Fund Balance	4,709,956												4,709,956	
													Fund Balance	
													646,785	

Fund 475 BUILDING FUND														
Building Fund (475)	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total	Budget
Revenue	1,428	21,428	1,457	1,457	1,457	2,001,457	1,457	1,457	63,063	1,457	311,457	1,457	2,409,028	4,657,732
Expenses	-	-	-	-	-	200	-	24,800	-	-	7,741	-	32,741	4,657,732
Profit/(Loss)	1,428	22,856	24,313	25,769	27,226	2,028,482	2,029,939	2,006,595	2,069,658	2,071,114	2,374,830	2,376,287		
Budgeted Transfer	(2,078,827)												(2,078,827)	
Beginning Fund Balance	27,168												27,168	
													Fund Balance	
													324,628	

Bond Budget Status Worksheet
5/31/2019

Total Resources

Source	Notes	Amounts
Bond	Original Bond Amount	\$14,200,000
Matching Funds	Oregon State Grant	\$4,000,000
Bond Premium		\$1,923,680
Loan Proceeds	Approved Loan	\$1,999,800
Rebate from Energy Trust	Rebate on LED lights put in existing Gym	\$14,939
Interest	Interest on Bond Funds	\$406,180
Other Funding Sources	CET Funds as available / Capital Resources	\$47,421
Return of funds - City of Yamhill	Funds remaining from Off-Site Water Project	\$147,000
Facilities Grant - ODE		\$61,606
	Total	\$22,800,626

Total Projects

Elementary School		Paid To Date	Committed	Total Project
Self Contracted Construction	Abatement / Exterior Lead Paint and Replace	778,303	8,643	786,946
Owner Costs	FFE, Hazardous Abatement, Move-In Logistics	162,061		162,061
Turner Projects	HVAC and Electrical	2,200,423		2,200,423
Total Elementary School		\$3,140,787	\$8,643	\$3,149,430

Intermediate School		Paid To Date	Committed	Total Project
Self Contracted Construction	Roof Repairs / Flat Roof Section Just Gym Section	59,240	13,803	73,043
Self Contracted Construction	Intermediate Annex Roof and Breezeway	-	89,973	89,973
Total Intermediate School		\$59,240	\$103,776	\$163,016

High School (Including Site Work)		Paid To Date	Committed	Total Project
Self Contracted Construction	HS Gym Lights, Locker Rooms, Gym Floor, Access Control/Security	235,569	6,303	241,872
Owner Costs	Demo, FFE, Hazardous Abatement, Move-In Logistics (includes: Gym Curtain, Desks, Network Equipment, YCHS Exterior Maint (Wood); Painting Existing Gym, Welding Hoods	671,582	375	671,957
City of Yamhill	Offsite Water Line	616,438	-	616,438
Test Port	Heinz Mechanical	2,500	-	2,500
Interior Painting Gym Dome	Built Out items Only - Holland Painting	46,600	-	46,600
Interior Painting Gym Dome	Weight Room - Holland Painting	940	-	940
Coil Doors Installation	Interior Technology	3,904	-	3,904
Concession Stand Work	Parts for Installation of Countertops for Coil Door Install	796	-	796
Glass on Interior Doors	Culver Windows (Glass Installation in Gym Doors)	975	-	975
Signs for Gym Dome	Donated materials as of 1/23/2019	-	-	-
Weight Room Floor / Installation	Donated materials as of 1/23/2019	-	-	-
Mats for Gym Walls (end of court)		2,320	-	2,320
Projects in Progress				-
<i>Contingency for CTE Building</i>	ie electric work for sound system	-	10,000	10,000
<i>Gym Dome Floor Installation</i>	Wood Floor Installation (T&T Contractors Inc)	25,000	28,000	53,000
<i>Gym Dome Floor Sealant</i>	Lobby / Under Bleachers (No Locker or Weight Room)	23,253	1,224	24,477
<i>Basketball Hoops and Wall Pads</i>	4 practice hoops/2 game hoops	7,075	38,212	45,287
<i>Volleyball Systems</i>	2 Nets / Referee Stand	-	5,893	5,893
<i>Sound Systems</i>	Current bids being reviewed	-	41,339	41,339
<i>Bleachers</i>		-	91,685	91,685
<i>Scoreboard (2 without installation)</i>	Includes cages	-	13,548	13,548
Turner Scope of Work through GMP 8		14,207,066	180,749	14,387,815
Total High School (Inc Site Work)		\$15,844,018	\$417,327	\$16,261,346

District Wide		Paid To Date	Committed	Total Project
Turner Construction Company	Pre-construction Services	82,048	-	82,048
Fees and Permits		92,713	-	92,713
OH! Architect (Pre-Design)		168,000	-	168,000
OH PLANNING+DESIGN ARCHITECTURE		2,084,028	-	2,084,028
M MARINO CONSULTING PC		394,832	-	394,832
Site Surveying		60,671	-	60,671
Printing and Publications		4,360	-	4,360
Community Coordination		800	-	800
Legal Counsel		29,706	-	29,706
Testing & Inspection		33,840	-	33,840
Bond and Investment Costs	Bond Closing Fees	160,895	-	160,895
Total District Wide		\$3,111,893	\$0	\$3,111,893
Total All Projects		\$22,155,939	\$529,747	\$22,685,685

Total Resources	\$22,800,626
Total Expenditures	\$22,685,685
Funds	\$114,941

**YAMHILL CARLTON SCHOOL DISTRICT
FOOD SERVICE**

LUNCH PROGRAM

FREE/REDUCED ELIGIBILITY **YCHS = 36.6%** **YCIS = 40.6%** **YCES = 40.2%** **DISTRICT = 39.2%**

2018-2019

		Total				YCHS				YCIS				YCES				Days	Per Day
		Total	Paid	Free	Reduced	Total	Paid	Free	Reduced	Total	Paid	Free	Reduced	Total	Paid	Free	Reduced		
September	2018	6,660	2,641	3,218	801	1,487	591	720	176	2,524	1,030	1,251	243	2,649	1,020	1,247	382	19	351
October	2018	7,532	3,196	3,372	964	1,721	759	727	235	2,610	1,162	1,177	271	3,201	1,275	1,468	458	20	377
November	2018	6,283	2,757	2,780	746	1,427	656	595	176	2,124	987	927	210	2,732	1,114	1,258	360	16	393
December	2018	5,728	2,555	2,511	662	1,318	614	547	157	1,993	946	847	200	2,417	995	1,117	305	15	382
January	2019	6,769	2,852	3,053	864	1,558	703	653	202	2,240	1,025	965	250	2,971	1,124	1,435	412	18	376
February	2019	5,914	2,471	2,666	777	1,418	617	611	190	1,931	869	848	214	2,565	985	1,207	373	16	370
March	2019	5,898	2,490	2,595	813	1,381	551	634	196	1,931	864	834	233	2,586	1,075	1,127	384	16	369
April	2019	8,255	3,301	3,741	1,213	1,923	715	905	303	2,722	1,145	1,226	351	3,610	1,441	1,610	559	22	375
May	2019	7,554	3,007	3,416	1,131	1,680	615	760	305	2,408	1,010	1,088	310	3,466	1,382	1,568	516	21	360
June	2019	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total		60,593	25,270	27,352	7,971	13,913	5,821	6,152	1,940	20,483	9,038	9,163	2,282	26,197	10,411	12,037	3,749	163	372
Per Day		371.74	155.03	167.80	48.90														
% of sales			41.7%	45.1%	13.2%	Free and Reduced % of Meals Sold						58.3%		Student Count		957.00			

2017-2018

		Total				YCHS				YCIS				YCES				Days	Per Day			
		Total	Paid	Free	Reduced	Total	Paid	Free	Reduced	Total	Paid	Free	Reduced	Total	Paid	Free	Reduced					
September	2017	7,952	2,723	3,932	1,297	1,713	538	897	278	3,165	1,089	1,622	454	3,074	1,096	1,413	565	19	419			
October	2017	9,131	3,414	4,194	1,523	1,860	648	912	300	3,553	1,410	1,665	478	3,718	1,356	1,617	745	21	435			
November	2017	7,091	2,835	3,150	1,106	1,449	580	645	224	2,752	1,146	1,275	331	2,890	1,109	1,230	551	16	443			
December	2017	5,820	2,347	2,533	940	1,125	421	513	191	2,226	930	1,001	295	2,469	996	1,019	454	13	448			
January	2018	8,406	3,278	3,663	1,465	1,655	626	745	284	3,142	1,279	1,426	437	3,609	1,373	1,492	744	20	420			
February	2018	7,832	3,027	3,442	1,363	1,507	526	698	283	2,913	1,204	1,289	420	3,412	1,297	1,455	660	18	435			
March	2018	7,286	2,795	3,260	1,231	1,443	478	702	263	2,590	1,111	1,109	370	3,253	1,206	1,449	598	17	429			
April	2018	8,987	3,445	3,990	1,552	1,707	561	804	342	3,186	1,350	1,386	450	4,094	1,534	1,800	760	21	428			
May	2018	8,547	3,258	3,859	1,430	1,607	490	804	313	2,902	1,206	1,306	390	4,038	1,562	1,749	727	21	407			
June	2018	3,420	1,368	1,505	547	661	231	312	118	1,284	561	559	164	1,475	576	634	265	9	380			
Total		74,472	28,490	33,528	12,454	14,727	5,099	7,032	2,596	27,713	11,286	12,638	3,789	32,032	12,105	13,858	6,069	175	426			
Per Day		425.6	162.8	191.6	71.2																	
Change		(53.8)	(7.8)	(23.8)	(22.3)	Free and Reduced % of Meals Sold				61.7%				Student Count				953.75				(54)
% change		-12.6%	-4.8%	-12.4%	-31.3%																	

**YAMHILL CARLTON SCHOOL DISTRICT
FOOD SERVICE**

BREAKFAST PROGRAM

2018-2019																				
		Total				YCHS				YCIS				YCES						
		Total	Paid	Free	Reduced	Total	Paid	Free	Reduced	Total	Paid	Free	Reduced	Total	Paid	Free	Reduced	Days	Per Day	
September	2018	2,549	850	1,379	320	319	94	205	20	763	274	393	96	1,467	482	781	204	19	134	
October	2018	2,918	985	1,540	393	456	175	211	70	788	280	423	85	1,674	530	906	238	20	146	
November	2018	2,567	926	1,307	334	376	139	183	54	721	281	365	75	1,470	506	759	205	16	160	
December	2018	2,178	723	1,147	308	341	117	176	48	645	259	304	82	1,192	347	667	178	15	145	
January	2019	2,592	876	1,352	364	406	155	198	53	639	270	302	67	1,547	451	852	244	18	144	
February	2019	2,299	775	1,205	319	356	112	184	60	570	246	275	49	1,373	417	746	210	16	144	
March	2019	2,457	894	1,193	370	459	157	222	80	643	297	286	60	1,355	440	685	230	16	154	
April	2019	3,743	1,278	1,900	565	807	226	436	145	957	377	464	116	1,979	675	1,000	304	22	170	
May	2019	3,419	1,146	1,757	516	688	202	368	118	794	340	355	99	1,937	604	1,034	299	21	163	
June	2019	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Total		24,722	8,453	12,780	3,489	4,208	1,377	2,183	648	6,520	2,624	3,167	729	13,994	4,452	7,430	2,112	163	152	
Per Day		151.7	51.9	78.4	21.4															
% of sales			34.2%	51.7%	14.1%	Free and Reduced % of Meals Sold				65.8%										
2017-2018																				
		Total				YCHS				YCIS				YCES						
		Total	Paid	Free	Reduced	Total	Paid	Free	Reduced	Total	Paid	Free	Reduced	Total	Paid	Free	Reduced	Days	Per Day	
September	2017	3,484	975	1,970	539	546	127	325	94	1,182	298	739	145	1,756	550	906	300	19	183	
October	2017	4,425	1,387	2,382	656	551	135	326	90	1,526	503	864	159	2,348	749	1,192	407	21	211	
November	2017	3,191	1,059	1,632	500	432	163	206	63	1,071	311	627	133	1,688	585	799	304	16	199	
December	2017	2,507	760	1,298	449	323	105	155	63	849	242	494	113	1,335	413	649	273	13	193	
January	2018	3,648	1,080	1,871	697	440	134	234	72	1,141	340	618	183	2,067	606	1,019	442	20	182	
February	2018	3,398	1,003	1,750	645	409	123	225	61	1,092	348	564	180	1,897	532	961	404	18	189	
March	2018	3,261	906	1,703	652	390	118	216	56	1,020	325	515	180	1,851	463	972	416	17	192	
April	2018	4,192	1,227	2,189	776	538	147	328	63	1,258	378	672	208	2,396	702	1,189	505	21	200	
May	2018	3,956	1,179	2,076	701	507	140	325	42	1,250	405	656	189	2,199	634	1,095	470	21	188	
June	2018	1,547	450	819	278	177	37	127	13	473	160	236	77	897	253	456	188	9	172	
Total		33,609	10,026	17,690	5,893	4,313	1,229	2,467	617	10,862	3,310	5,985	1,567	18,434	5,487	9,238	3,709	175	192	
Per Day		192.1	57.3	101.1	33.7															
Change		(40.4)	(5.4)	(22.7)	(12.3)															(40)
% change		-21.0%	-9.5%	-22.4%	-36.4%	Free and Reduced % of Meals Sold				70.2%										

(40)

YC Superintendent's Report 6/13/19

Welcome to the last meeting of the year. I appreciate everyone's hard work and dedication to helping our student's grow during the 2018-2019 school year. A special thank you to Cindy Schubert for filling at the high school for the school year. I wish Lauren Berg and Shiloh Ficek good fortune as they move on to the next phase of her careers. Tim Pfeiffer is retiring from the board and we will miss his good sense and willingness to help the hard work get done.

New and Reelected Board Members – I would like to offer my congratulations to Dr. Susan Fitzgerald on her reelection to the school board. Welcome and congratulations to Megan Gomez, who was elected to replace retiring board member, Tim Pfeiffer.

SBHC – The YC School Based Health Center is closing. After years of trying to keep the site open the Yamhill County Health Department is going to move the facility to a different school district. Over the course of its history at least five different medical providers have tried to establish a viable SBHC center, unfortunately none were able to develop a large enough patient base to sustain their practice. Yamhill County will continue to fund a .5 FTE mental health counselor at the high school despite the loss.

Graduation and Promotion – Congratulations to the high school and intermediate school teams for great ceremonies marking students' life transitions. These are important moments for both students and communities. I appreciate the effort that is put in to make these events special.

Gym Construction – The floor is being painted, the sound system, bleachers, and scoreboards have been ordered, and students are now using the weight room.

Continuous School Improvement Plan (CDIP) – I have been spending quite a bit of time refining the CDIP. Once it is complete, we will have some funding released to the school district for targeted improvement of underperforming students in various subgroups. The CDIP will also be used to apply for funds from the future school improvement funds that are projected to be available for the 2019-2020 school year.

New Management Hires – We interviewed for a new high school assistant principal and athletic director during the week. We had a good pool of twenty-six that were narrowed to 5 out of district and 1 in district candidates through paper screening. The hiring team interviewed the finalists and is working on a selection. The next task will be to hire a Food Service Manager for the district.

Summer – Starting in July the school district office will be closed on Fridays. Principals will be off and will return August 1st.

Yamhill Carlton School District



JCI Northwest Team
June 13, 2019

Project Goals

- ☐ Improve Safety, Security and Comfort of Learning Environments
 - ☐ Reduce Utility and Operational Costs
 - ☐ Address Deferred Maintenance Backlog
 - ☐ Leverage SB1149 and Energy Trust of Oregon Incentives (many LED lighting incentives are expected to be off the table to start 2020).
 - ☐ Modernize Aging Systems at YCSD Intermediate School (IS)
 - ☐ HVAC and Lighting Classroom work completes before start of school.
- Heating system ON by Oct.1 – Project completes January 2020.

Performance Contracting: The Holistic Approach

Benefits:

- ☐ **Risk is transferred** from the school district to Johnson Controls for ensuring savings materialize
- ☐ Maximize efficiency and achieve deep retrofits
- ☐ Bundle short-term and long-term investments
- ☐ **No out-of-pocket costs for the school district required**, except to fund expanded scope
- ☐ Maximize grants and incentives
- ☐ Implement more work faster
- ☐ Standardize equipment
- ☐ **Open Book Pricing Structure**
- ☐ Address deferred maintenance
- ☐ Improve accountability
- ☐ Create local economic benefits
- ☐ Focus on lifecycle value
- ☐ **Guaranteed Performance and financial benefits**

Project Highlights

- ❑ Project Investment: \$2.223M or \$3.280M
- ❑ Three Year Measurement & Verification
- ❑ Indicative Finance Rates: 20 Years @ 3.35%, 25 years @ 3.65%
- ❑ Projected Energy Efficiency Rebates: \$23,589 (Lighting rebates from ETO Existing Building Program for Campus Buildings)
- ❑ Leverage SB1149 funds



Option 1 & 2 - Facility Improvement Measures

- ☐ LED Lighting Upgrade
- ☐ Central Propane Tank Installation with piping to all buildings
- ☐ Replacement of Burners at *IS, HS, HS Gym and HS Cafeteria
- ☐ Replacement of DHW heaters at IS, HS, and HS Cafeteria
- ☐ Tie-in HS Gym Laundry unit to new propane tank
- ☐ Replacement of valves in (24) fan-coil units at IS
- ☐ *Reuse existing automation systems at all schools (no standardization)

Note: asterisk items limited to Option 1

Boiler & Burners – Option 2

- ☐ New Steam boiler at YCSD IS and burner replacement for other three buildings
 - ☐ Replace existing steam boiler with propane-fired **steam boiler**
 - ☐ 1 new steam boiler at Intermediate School
 - ☐ Replace existing condensate tank with new
 - ☐ Water softener for boiler system
 - ☐ Reuse existing steam piping system and steam FCUs
 - ☐ Replace existing boiler burner with propane-fired **burner**
 - ☐ 1 steam boiler **burner** at HS main building
 - ☐ 1 hot water boiler **burner** at HS old gym building
 - ☐ 1 hot water boiler **burner** at Cafeteria

☐ Control Upgrade

☐ New centralized BAS to control following buildings

YCSD ES	YCSD IS	YCSD HS
YCSD Old Gym	YCSD Cafeteria	YCSD Office

☐ New heating valve and actuator for 24 FCUs heating loop at IS

☐ VFDs on HVU-1 supply/return fans at Cafeteria building

☐ Demand Control Ventilation

☐ Adding CO2 sensors to FCUs to control OSA at IS, HS, Old Gym and Cafeteria

☐ Modify existing 6 unit ventilators at IS and 3 unit ventilators at HS

Facility Improvement Measures Matrix by Option

Option	Facility	LED Lighting & controls	Central Propane System at Main Campus	New Steam Boiler	New Boiler Burner	New DHW	New Condensing Hot Water Boilers with piping and 19 hot water FCUs and 5 heating water coils	Reuse existing control system and ONLY replace 24 heating valves at IS building	Control Upgrade -- Centralized DDC
1 - \$2.223M	ES								
	IS								
	HS								
	Old Gym								
	Cafeteria								
	District Office								
	Misc.								
2 - \$3.280M	ES								
	IS								
	HS								
	Old Gym								
	Cafeteria								
	District Office								
	Misc.								

Option 1 – Base \$2.173M + \$50,000 owner contingency. Self –funded plan

Opt 1- Financial Proforma - Base Option 20 Year term - \$ 2.173 M self funded + \$50k Owner Contingency; \$69 k SB1149 ; 20 Years @ 3.35%, 3 years M&V									
Year	Savings			Rebates	Total Savings	SB 1149	Loan Payment	Performance Management M&V	Balance
	Utility Savings	Operational Savings	Total						
Install	\$ 35,589	\$ -	\$ 35,589	\$ 23,589	\$ 59,178	\$ -		\$ -	\$ 59,178
1	\$ 59,071	\$ 9,716	\$ 68,788	\$ -	\$ 68,788	\$ -	\$ 120,973	\$ 6,993	\$ (59,178)
2	\$ 64,870	\$ 10,008	\$ 74,878	\$ -	\$ 74,878	\$ -	\$ 67,675	\$ 7,203	\$ -
3	\$ 71,074	\$ 10,308	\$ 81,382	\$ -	\$ 81,382	\$ -	\$ 73,964	\$ 7,419	\$ -
4	\$ 77,710	\$ 10,617	\$ 88,328	\$ -	\$ 88,328	\$ 23,000	\$ 111,328	\$ -	\$ -
5	\$ 84,806	\$ 10,936	\$ 95,742	\$ -	\$ 95,742	\$ 23,000	\$ 118,742	\$ -	\$ -
6	\$ 92,393	\$ 11,264	\$ 103,656	\$ -	\$ 103,656	\$ 23,000	\$ 126,656	\$ -	\$ -
7	\$ 100,501	\$ 11,602	\$ 112,103	\$ -	\$ 112,103		\$ 112,103	\$ -	\$ -
8	\$ 109,165	\$ 11,950	\$ 121,115	\$ -	\$ 121,115		\$ 121,115	\$ -	\$ -
9	\$ 118,421	\$ 12,308	\$ 130,729	\$ -	\$ 130,729		\$ 130,729	\$ -	\$ -
10	\$ 128,308	\$ 12,678	\$ 140,986	\$ -	\$ 140,986		\$ 140,986	\$ -	\$ -
11	\$ 138,867	\$ 13,058	\$ 151,925	\$ -	\$ 151,925		\$ 151,925	\$ -	\$ -
12	\$ 150,141	\$ 13,450	\$ 163,591	\$ -	\$ 163,591		\$ 163,591	\$ -	\$ -
13	\$ 162,177	\$ 13,853	\$ 176,030	\$ -	\$ 176,030		\$ 176,030	\$ -	\$ -
14	\$ 175,024	\$ 14,269	\$ 189,293	\$ -	\$ 189,293		\$ 189,293	\$ -	\$ -
15	\$ 188,735	\$ 14,697	\$ 203,432	\$ -	\$ 203,432		\$ 203,432	\$ -	\$ -
16	\$ 203,367	\$ 15,138	\$ 218,504	\$ -	\$ 218,504		\$ 218,504	\$ -	\$ -
17	\$ 218,978	\$ 15,592	\$ 234,569	\$ -	\$ 234,569		\$ 234,569	\$ -	\$ -
18	\$ 235,632	\$ 16,060	\$ 251,691	\$ -	\$ 251,691		\$ 251,691	\$ -	\$ -
19	\$ 253,396	\$ 16,541	\$ 269,938	\$ -	\$ 269,938		\$ 269,938	\$ -	\$ -
20	\$ 272,344	\$ 17,038	\$ 289,382	\$ -	\$ 289,382		\$ 287,923	\$ -	\$ 1,458
Total	\$ 2,940,570	\$ 261,081	\$ 3,201,650	\$ 23,589	\$ 3,225,239	\$ 69,000	\$ 3,271,167	\$ 21,614	\$ 1,458

Option 2 – \$3.22M + \$60,000 owner contingency. \$7,500 annual capital contribution. Plan includes new Steam Boiler and full Direct Digital Controls

Opt 2- Financial Proforma - New steam boiler at IS Option 25 Year term - \$ 3.220 M + \$60k Owner Contingency; \$7,500 annual capital contribution for 25 years; \$69 k SB1149; 25 Years @ 3.65%, 3 years M&V										
Year	Savings			Rebates	Total Savings	SB 1149	Annual Capital Contribution	Loan Payment	Performance Management M&V	Balance
	Utility Savings	Operational Savings	Total							
Install	\$ 37,779	\$ -	\$ 37,779	\$ 23,589	\$ 61,368	\$ -	\$ -	\$ -	\$ -	\$ 61,368
1	\$ 65,311	\$ 21,304	\$ 86,615	\$ -	\$ 86,615	\$ -	\$ 7,500	\$ 147,526	\$ 7,957	\$ (61,368)
2	\$ 70,838	\$ 21,943	\$ 92,781	\$ -	\$ 92,781	\$ -	\$ 7,500	\$ 92,086	\$ 8,195	\$ -
3	\$ 76,725	\$ 22,601	\$ 99,326	\$ -	\$ 99,326	\$ -	\$ 7,500	\$ 98,385	\$ 8,441	\$ -
4	\$ 82,992	\$ 23,279	\$ 106,271	\$ -	\$ 106,271	\$ 23,000	\$ 7,500	\$ 136,771	\$ -	\$ -
5	\$ 89,664	\$ 23,978	\$ 113,642	\$ -	\$ 113,642	\$ 23,000	\$ 7,500	\$ 144,142	\$ -	\$ -
6	\$ 96,765	\$ 24,697	\$ 121,462	\$ -	\$ 121,462	\$ 23,000	\$ 7,500	\$ 151,962	\$ -	\$ -
7	\$ 104,320	\$ 25,438	\$ 129,758	\$ -	\$ 129,758	\$ -	\$ 7,500	\$ 137,258	\$ -	\$ -
8	\$ 112,359	\$ 26,201	\$ 138,560	\$ -	\$ 138,560	\$ -	\$ 7,500	\$ 146,060	\$ -	\$ -
9	\$ 120,911	\$ 26,987	\$ 147,898	\$ -	\$ 147,898	\$ -	\$ 7,500	\$ 155,398	\$ -	\$ -
10	\$ 130,006	\$ 27,797	\$ 157,802	\$ -	\$ 157,802	\$ -	\$ 7,500	\$ 165,302	\$ -	\$ -
11	\$ 139,677	\$ 28,631	\$ 168,308	\$ -	\$ 168,308	\$ -	\$ 7,500	\$ 175,808	\$ -	\$ -
12	\$ 149,961	\$ 29,489	\$ 179,451	\$ -	\$ 179,451	\$ -	\$ 7,500	\$ 186,951	\$ -	\$ -
13	\$ 160,894	\$ 30,374	\$ 191,268	\$ -	\$ 191,268	\$ -	\$ 7,500	\$ 198,768	\$ -	\$ -
14	\$ 172,516	\$ 31,285	\$ 203,801	\$ -	\$ 203,801	\$ -	\$ 7,500	\$ 211,301	\$ -	\$ -
15	\$ 184,868	\$ 32,224	\$ 217,092	\$ -	\$ 217,092	\$ -	\$ 7,500	\$ 224,592	\$ -	\$ -
16	\$ 197,995	\$ 33,191	\$ 231,186	\$ -	\$ 231,186	\$ -	\$ 7,500	\$ 238,686	\$ -	\$ -
17	\$ 211,945	\$ 34,186	\$ 246,131	\$ -	\$ 246,131	\$ -	\$ 7,500	\$ 253,631	\$ -	\$ -
18	\$ 226,766	\$ 35,212	\$ 261,978	\$ -	\$ 261,978	\$ -	\$ 7,500	\$ 269,478	\$ -	\$ -
19	\$ 242,513	\$ 36,268	\$ 278,781	\$ -	\$ 278,781	\$ -	\$ 7,500	\$ 286,281	\$ -	\$ -
20	\$ 259,240	\$ 37,356	\$ 296,597	\$ -	\$ 296,597	\$ -	\$ 7,500	\$ 304,097	\$ -	\$ -
21	\$ 277,009	\$ 38,477	\$ 315,486	\$ -	\$ 315,486	\$ -	\$ 7,500	\$ 322,986	\$ -	\$ -
22	\$ 295,881	\$ 39,631	\$ 335,513	\$ -	\$ 335,513	\$ -	\$ 7,500	\$ 343,013	\$ -	\$ -
23	\$ 315,925	\$ 40,820	\$ 356,745	\$ -	\$ 356,745	\$ -	\$ 7,500	\$ 364,245	\$ -	\$ -
24	\$ 337,210	\$ 42,045	\$ 379,255	\$ -	\$ 379,255	\$ -	\$ 7,500	\$ 386,755	\$ -	\$ -
25	\$ 359,812	\$ 43,306	\$ 403,119	\$ -	\$ 403,119	\$ -	\$ 7,500	\$ 374,827	\$ -	\$ 35,791
Total	\$ 4,519,883	\$ 776,721	\$ 5,296,604	\$ 23,589	\$ 5,320,193	\$ 69,000	\$ 187,500	\$ 5,516,308	\$ 24,594	\$ 35,791

Utility Rates Escalation Values - Preliminary

Contract Escalation:

- ☐ Electricity Escalation: 3.5%
- ☐ Fuel Oil Escalation Avoidance: 6.1%
- ☐ Propane: 2.5%
- ☐ O&M Escalation: 3%

Note: In some cases actual rates may be used instead of contract escalations

Next Step – Co-Op Purchasing Contracting Process (Sourcewell)

Empower Administration to Negotiate Contract and Financing:

- ☐ Finish Financing process (RFP, Term-sheet and Contract Closing)
- ☐ Finish and Sign Performance Contract
- ☐ Implement Project

Discussion



David Nellis

Johnson Controls – Performance
Infrastructure

Milwaukie, Oregon

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503-858-4757

REPORT TO THE SCHOOL BOARD

Board Meeting of June 13, 2019

Agenda Section: New Business

SUBJECT: **Adopt a resolution allowing the Administration to negotiate and approve an Energy Savings Performance Contract (ESPC) for the General Fund (Buildings) up to and not to exceed \$3,280,000. Pursuant to Oregon Law (ORS.279A.205) authorization of cooperative procurements and Authorizing the Business Manager to negotiate and execute the same; and establish a Reserve for the Energy Savings Performance Contract.**

Prepared By: Tami Zigler, Business Manager

Authorized By: Charan Cline, Superintendent

Approved By: Added by the Executive Secretary following approval

RECOMMENDATION:

On June 7, 2019, Johnson Controls Inc. presented a base plan along with a plan that included additional energy saving options to the incoming Superintendent, the Business Manager and The Facilities lead. The base plan (Option 1) addressed only essential energy efficiency related to SB1149 funds. Option 2 included additional work that offered lighting and other energy efficiency upgrades at all 3 schools. The staff recommends the School District should proceed with the selection of a Project plan that best addresses the needs of the District and associated an Energy Savings Performance Contract with Johnson Controls, Inc. (JCI), authorizing the Business Manager to Execute an Energy Savings Performance Contract and establish a reserve in accordance with the said agreement.

HISTORY / BACKGROUND:

In January 2019, the District met with Johnson Controls Inc. (JCI) to perform a feasibility study of 3 school buildings. Since that time and under the guidance of District staff, JCI has developed a potential energy efficiency project.

JCI presented the results of the feasibility analysis at an Administrative team meeting. This analysis identified an estimated \$2.223-\$3.28 million Energy Efficiency / Infrastructure project, leveraging future available SB1149 funds along with Energy Trust of Oregon incentives to maximize the project scope and benefits.

The Investment Grade Audit/Engineering Agreement provided a more detailed analysis of the proposed project that included engineering design and importantly construction costs. From that audit, 2 potential energy savings plans have been presented to the District for their determination on which plan best serves their needs.

Deliverables will include an Energy Savings Performance Contract with a Guaranteed Maximum Price, Scope of work and Guaranteed Performance.

ATTACHMENTS:

PowerPoint - Project Overview

SCHOOL BOARD RESOLUTION # 2019-08

ADOPT A RESOLUTION APPROVING AN ENERGY SAVINGS PERFORMANCE CONTRACT WITH JOHNSON CONTROLS, INC. (JCI)

WHEREAS, the Yamhill Carlton School District desires to enter into an Energy Savings Performance Contract for Energy Efficiency and Infrastructure pursuant to and

WHEREAS, The Yamhill Carlton School District desires to retain JCI to perform the work specified in the ESPC Rev 15 and

WHEREAS, The Yamhill Carlton School District is authorized and empowered **Pursuant to Oregon Law (ORS.279A.205) authorization of cooperative procurements** and the Yamhill Carlton School District has complied with all requirements of said laws; and

NOW, THEREFORE, LET IT BE RESOLVED that the School Board of Yamhill Carlton School District hereby finds and determines the following:

1. The above recitals are true and correct.
2. This resolution is effective immediately upon adoption.
3. School Board authorizes the Business Manger to negotiate and execute an Energy Savings Performance Contract at a dollar amount no greater than \$3.28M **Pursuant to Oregon Law (ORS.279A.205) authorization of cooperative procurements** and enter into required third-party financing agreement using Tax-Exempt Lease Purchase.

PASSED AND ADOPTED by the School Board on this 13th of June by the following votes:

YES:

NO:

ABSENT:

ABSTAIN:

Jami Egland, Board Chair

Charan Cline, Superintendent

ATTEST:

Executive Secretary

**Yamhill Carlton School District
Resolution # 2019-09**

ADOPTING THE BUDGET

BE IT RESOLVED THAT THE Board of Directors of the Yamhill Carlton School District hereby adopts the budget for the fiscal year 2019-2020 in the total of \$23,620,619 now on file at the Yamhill Carlton District Office located at 120 N. Larch Place, Yamhill, OR 97148.

MAKING APPROPRIATIONS

BE IT RESOLVED that the amounts for the fiscal year beginning July 1, 2019 and for the purposes shown below are hereby appropriated.

GENERAL FUND

Instruction	6,551,385
Support Services	4,479,428
Transfers	185,029
Debt Service	-
Contingency	425,000
Total General fund	11,640,842

SPECIAL REVENUE FUNDS

Instruction	1,266,167
Support Services	175,900
Community Services	310,360
Total Special Revenue Funds	1,752,427

DEBT SERVICE FUND

Debt Service	5,357,850
Total Debt Service Funds	5,357,850

CONSTRUCTION PROJECT FUND

Support Services	-
Building & Acquisition	2,688,848
Debt Service	2,136,152
Contingency	-
Total Construction Project Fund	4,825,000

TRUST AND AGENCY FUNDS

Instruction	2,000
Reserved for Next Year	42,500
Total Trust & Agency Fund	44,500

TOTAL APPROPRIATIONS, All Funds	23,578,119
Total Unappropriated and Reserve Amounts	42,500
TOTAL ADOPTED BUDGET	23,620,619

IMPOSING THE TAX

BE IT RESOLVED that the following ad valorem property taxes are hereby imposed upon the assessed value of all taxable property within the district for tax year 2019-2020:

- (1) At the rate of \$4.7818 per \$1000 of assessed value for permanent rate tax
- (2) In the amount of \$1,549,504 for debt service on general obligation bonds

CATERGORIZING THE TAX

BE IT RESOLVED that the taxes imposed are hereby categorized for purposes of Article XI section 11b as:

Subject to the Education Limitation

Permanent Rate Tax \$4.7818/per \$1000

Excluded from Limitation

General Obligation Bond Debt Service \$1,549,504

The above resolution statements were approved and declared adopted on the 13th day of June 2019.

X

Jami Egland, Board Chair

X

Charan Cline, Superintendent

RESOLUTION 2019-07

YAMHILL CARLTON SCHOOL DISTRICT
RESOLUTION TO AUTHORIZE BUDGET RE-APPROPRIATION
2018-2019 BUDGET

Appropriation Details

General Fund – Increase appropriations to transfer funds and decrease contingency.

The Food Service Program underwent a significant decrease in meals being served during the 2018-2019 fiscal year. Although it was closely monitored, in order to maintain the level of nutrition services for our students, the program was not self-sustaining and requires a transfer of \$45,000 from General Fund into Fund 250.

PERS UAL revenue calculations into Fund 302 were based on projected salary. In order to maintain minimal increases in future years, the District will transfer funds into the PERS UAL fund in the amount of \$100,000.

Bond Construction in Fund 405. Transfer funds to cover additional bond projects in the amount of \$100,000.

BE IT RESOLVED, that for the fiscal year beginning July 1, 2018, the budget transfers shown below, are hereby appropriated as indicated within the funds listed:

GENERAL FUND

<u>Expenditure Function</u>	<u>Adopted Budget</u>	<u>Supplemental Budget</u>	<u>Adjusted Budget</u>
Instruction	\$ 6,026,486	0	\$ 6,026,486
Support Services	4,379,524	0	4,379,524
Transfers	215,964	245,000	460,964
Debt Service	0	0	0
Contingency	<u>400,000</u>	<u>(245,000)</u>	<u>155,000</u>
Total	<u>\$ 11,021,974</u>	<u>0</u>	<u>\$ 11,021,974</u>

ADOPTED by the Board of Directors of the Yamhill Carlton School District this 13th day of June 2019.

Jami Egland, Chair

Charan Cline, Superintendent

Social Studies Curriculum Adoption

The YC social studies teachers are excited to present an innovative, ODE approved, highly ranked digital resource program: Active Classroom.

Some of the benefits of this program include:

- supports the learning strategies that we already teach throughout content areas, specifically with high-needs groups
- vocabulary development through in-text dictionaries, specifically a “picture dictionary”
- text annotation features, including personalized colors and labels
- built-in differentiated grouping functions
- leveled readings
- activities for multiple learning preferences (simulations, music, video, debate, essays, primary source evaluations, etc.)
- foreign language translation and support tools
- develops high level, critical thinking skills
- Includes student data tracking

In addition, it is built around using interactive technology, rather than adapted for it, and it builds 21st century technological skills. It is also highly recommended by our ELD specialist Cassie Andresen because of the foreign language supports. It is uniquely fit to meet some of our greatest curricular challenges in the social studies program: the need for active learning, the need for a variety of learning supports, and the need for high quality, state approved, leveled texts that promote a variety of perspectives on current topics.

CONTRACT AGREEMENT
2019-20 thru 2020-21

Between

**OREGON SCHOOL EMPLOYEES
ASSOCIATION, CHAPTER 171**

And

**YAMHILL CARLTON SCHOOL
DISTRICT NO. 1
YAMHILL COUNTY, OREGON**

TABLE OF CONTENTS

1		
2	ARTICLE 1 - Recognition.....	2
3	ARTICLE 2 - Dues Deduction	2
4	ARTICLE 3 - Successor Agreement.....	3
5	ARTICLE 4 - Association Rights	3
6	ARTICLE 5 – District Rights	3
7	ARTICLE 6 - Personnel Records.....	4
8	ARTICLE 7 - Compensation	4
9	ARTICLE 8 - School Closures	6
10	ARTICLE 9 - Hours of Work	7
11	ARTICLE 10 - Holidays.....	7
12	ARTICLE 11 - Vacations	8
13	ARTICLE 12 – Paid Leave.....	8
14	ARTICLE 13 - Unpaid Leave.....	10
15	ARTICLE 14 - Employment and Assignment.....	10
16	ARTICLE 15 - Reduction in Force/Seniority	11
17	ARTICLE 16 - Grievance Procedure.....	14
18	ARTICLE 17 - Separability	17
19	ARTICLE 18 - Funding.....	17
20	ARTICLE 19 - No Strike Provision.....	17
21	ARTICLE 20 - Evaluations	17
22	ARTICLE 21 – Fringe Benefits.....	17
23	ARTICLE 22 - Just Cause	19
24	ARTICLE 23 – Wages Placement Schedule	19
25	ARTICLE 24 - Classes and Workshops	20
26	TERMS OF AGREEMENT	21
27	SIGNATURE PAGE.....	22
28	Appendix A Classification Groups	A
29	Appendix B 2019-20 Wage Schedule.....	B
30	Appendix C 2020-21 Wage Schedule.....	C

ARTICLE 1 - Recognition

- 1.1 The District recognizes the Association as the sole and exclusive collective bargaining representative for all employees who work in all regular full and part-time classified positions. Supervisors, confidential employees and substitute employees are excluded from the bargaining unit.
- 1.2 There shall be two signed copies of the final agreement for the purpose of records. One shall be retained by the District and one by the Association. Within one month of ratification of this agreement by both parties, the Board agrees to post the new Classified Collective Bargaining Agreement on the District Website.
- 1.3 A substitute employee shall be defined as a person who replaces a regular employee for a period not to exceed 120 calendar days. If it becomes necessary for a substitute position to exceed 120 calendar days, or at the time it is apparent that the assignment will exceed 120 calendar days, the position shall become a temporary position.
- 1.4 A temporary employee shall be defined as a person hired for a grant-funded position, seasonal work or the extended absence of a regular employee for a period in excess of 120 calendar days and not more than one (1) year. The temporary employee shall become a member of the bargaining unit and shall have all the privileges and benefits of membership except layoff and recall rights. Temporary employees do not accrue seniority; however, when a temporary employee is hired into a regular position where there is not a break in employment, time spent as a temporary employee shall be credited toward seniority.
- An Instructional Assistant working on a Conditional Contract with Yamhill Carlton School District is considered a temporary employee for purposes of contract language. These contracts exist to allow the District to employ staff members to work with students who have a medical or behavioral need for a one on one assistant. Contracts are renewed on a yearly basis and employment may be terminated any time the student withdraws from school or moves to another district.
- 1.5 The rate of pay for a substitute or temporary employee will be at least the lowest step of the classification for which the substitute or temporary employee is hired.

ARTICLE 2 - Dues Deduction

- 2.1 The District agrees to deduct from the wages of each Association member the dues of the Association. Authorization shall be in writing by each employee on the form provided by the Association.
- The Association agrees to hold the District harmless against any and all claims, suits and judgments brought against the District as a result of the provision of this article.

65 2.2 The District agrees to transmit the dues deducted with a check-off list to the state office of
66 the Oregon School Employees Association by the 15th of the month following payroll
67 deduction.

68 **ARTICLE 3 - Successor Agreement**

69 3.1 This agreement shall not be modified in whole or in part by the parties except by an
70 instrument in writing duly executed by both parties. Notice of intent to negotiate a
71 successor agreement shall be given to the District by February 1, 2021.

72 **ARTICLE 4 - Association Rights**

73 4.1 The local Association or the committees of the local Association may, when not in regular
74 or scheduled use, and with the permission of the Superintendent or Principal be allowed
75 facilities in which to meet.

76 The Association may be allowed use of such office equipment when needed to provide
77 duplication material to the members. All supplies must be paid for by the Association and
78 clearance to use the equipment must be given to the Superintendent or Principal.

79 4.2 The District will provide each employee in the bargaining unit an accounting of the
80 employee's accumulation of sick leave prior to October 31st of each school year.

81 **ARTICLE 5 – District Rights**

82 5.1 It is recognized that the Board of Directors has, and will continue to retain, the rights and
83 responsibilities to operate and manage the school system and its programs, facilities and
84 educational activities of its employees.

85 5.2 Without limiting the generality of the foregoing 5.1, it is expressly recognized that the
86 Board's operational and managerial rights include:

87 • The right to determine location of the schools and other facilities of the school system,
88 including the right to establish new facilities and to relocate or close facilities;

89 • The determination of the financial policies of the District, including the general
90 accounting procedures, inventory of supplies and equipment procedures and public
91 relations;

92 • The determination of the management, supervisory, or administrative organization of
93 each school or facility in the system, and the decisions to promote the employees to
94 supervisory, management or administrative positions;

- 95 • The maintenance of discipline, control and use of the school system, property and
96 facilities;
- 97 • The determination of the safety, health and property protection measures where legal
98 responsibility of the Board or another governmental agency is involved;
- 99 • The right to enforce the rules and regulations now in effect and to establish new rules and
100 regulations from time to time not in conflict with this Agreement;
- 101 • The direction and arrangement of all working forces in the system, including the right to
102 hire, suspend, discharge, discipline or transfer employees;
- 103 • The creation, combination, modification or elimination of any classified position;
- 104 • The determination of the size of the work force, the allocation and assignment of work to
105 employees, the establishment of quality standards and evaluation of employee
106 performance.
- 107 5.3 The foregoing enumerations of the functions of the Board shall not be considered to
108 exclude other functions of the Board not specifically set forth; the Board retains all
109 functions and rights to act not specifically nullified by this agreement.

110 **ARTICLE 6 – Personnel Records**

- 111 6.1 The personnel records of any employee in the bargaining unit shall be maintained in the
112 District's personnel office. Such personnel records shall not contain any information of a
113 critical nature that does not bear the employee's signature or initials indicating that the
114 employee has been shown the material. An employee shall have the right to attach a written
115 statement of explanation to any material. If the employee refuses to sign or initial such
116 statements, then the supervisor or administrator, and a witness will then sign the statement
117 which then is placed into the employee's file.
- 118 6.2 The District agrees that it is an employee's right under law to inspect his or her personnel
119 file.
- 120 6.3 Material placed in the personnel records of an employee without conformity with the
121 provision of this agreement will not be used by the Board in any subsequent evaluation or
122 disciplinary procedure involving the employee.

123 **ARTICLE 7 - Compensation**

- 124 7.1 Wages for classified employees shall be the same as indicated on the attached Wage
125 Schedules.

126 7.2 Pay day shall be the 15th day of each month. When the 15th falls on a weekend the pay day
127 will be the Friday preceding. Monthly contract payments shall be paid as stated below:

128 12 Month employees – Twelve equal payments, July to June.
129 11 Month employees (Aug 1 to June 30) – Twelve equal payments, August to June with
130 two checks received in June.
131 9, 10, 10+ Month employees – Twelve equal payments, September to August with three
132 checks received in June.

133 7.3 Physical examination and hepatitis B shots that are mandated by the District for each
134 employee will be paid for by the District.

135 7.4 Costs associated with fingerprinting and/or background checks for District employees who
136 move from one position to another within the District will be paid by the District if they
137 are required. Costs for fingerprinting and/or background checks for new classified
138 employees will be paid by the employee. All drug, alcohol or other tests, including pre-
139 employment screenings, required by the District will be paid for by the District.

140 7.5 An employee who substitutes for an absent employee will move up to the wage level of the
141 absent employee but will remain on their current step provided:
142 1. The rate of pay of the absent employee is higher; and
143 2. The time substituted totals at least one full day of that position's time.

144 7.6 Any employee who performs supervision at school functions as authorized by the principal
145 shall be compensated at the same rate of pay per hour as defined in the current certified
146 contract.

147 7.7 When committees are formed requiring substantial time commitments, the Administration
148 in consultation with the Association shall review the committees' objectives, timelines, and
149 whether or not the committee shall be voluntary or compensated at the extra duty rate.
150 Committees requiring substantial time commitments shall be compensated at the extra duty
151 rate as defined in the certified contract. The definition of a substantial time commitment
152 shall be committee assignments, which meet the following criteria:

153 1. Meeting times are consistently outside the normal working hours,
154 2. Release time is not provided,
155 3. The committee meets for an extended period of time.
156

157 7.8 Upon retirement an employee will be paid the following lump sum amounts based upon
158 the number of full time equivalent years of service accumulated in the District:

159 10-14 years: \$500 15-19 years: \$1000 20 or more years: \$1500

160 7.9 In the event of the absence of a certified staff member who supervises IA's the District will
161 ensure a certified person is assigned to cover for the absent staff member.

- 7.10 Employees who are eligible for step advancement will make such movement on July 1st of each year covered by this agreement. An employee shall work at least 70% of the contract's days for that position in any given year to qualify for the step/year advancement.

ARTICLE 8 - School Closures

- 8.1 The following guidelines are to be used in cases where school is cancelled or delayed due to inclement weather or other emergencies:

If school is delayed:

In the event of a late start, all employees report to work at their regular times, if it is safe to do so. If an employee is unable to report at the regular time, they are to report before the students arrive. Employees must notify their building Administrator if they are going to be delayed arriving to school. The Building Administrator will be responsible for making arrangements for making up any missed time.

If an employee is delayed beyond the student arrival time or cannot make it to work at all because of road conditions the employee must call their building level secretary to report the absence in the substitute management system as Unpaid, Vacation, or Personal leave.

If school is closed:

Instructional Assistants, All Secretaries, and Food Service Workers:

Do not report to work and do not call the substitute management system to report an absence as the day may be rescheduled later in the school year if we are closed for more than the two days the state allows us.

Maintenance, Groundskeepers: Must report to work at the regular time, if not able to make it to work they must call the Facilities Director. If unable to come in on more than two snow days (the amount allowed by the State without make-up days) leave will need to be used to cover any additional absences. Employees who are required to work will be granted comp time for the hours worked.

Custodian I: Do not report to work unless the Facilities Director calls you to come in.

- 8.2 For school closure other than inclement weather, employees will be paid for a regular day if school is closed after they have worked at least half of their regular workday and are sent

home early. If school is closed after they have arrived at work but before they have worked half a day, they will be paid for half a day. Those who do not come in for any work time will not be compensated. In emergency/safety situations, the District may require specified employees to work.

Any time loss experienced by an employee due to school closure, for purposes other than inclement weather, may be made up at a time mutually agreeable by the District and the employee, except when the District extends the school year to make up the time.

ARTICLE 9 - Hours of Work

9.1 Each employee will have a break not to exceed 15 minutes for every 4 hours of work. An employee working more than 5 hours per day shall have in addition to the break, ½ hour unpaid, uninterrupted lunch break. An employee working more than 7 hours per day shall have an additional 15-minute break. Breaks are not accumulative.

9.2 The workweek shall be Sunday through Saturday.

9.3 An employee called back to work or called into work on a scheduled day off shall be guaranteed a minimum of 2 hours at the rate of time and a half of that employee's rate of pay.

9.4 An employee in the bargaining unit shall not be required to work in addition to 40 hours per week without compensation of time and a half of that employee's rate of pay or the time and a half equivalent in compensatory time off.

1. The District will have the option of using part-time employees for work beyond 40 hours a week.

2. Any overtime worked must have prior approval of the principal or superintendent for the specific overtime hours to be worked.

ARTICLE 10 - Holidays

10.1 The following will be paid holidays for 12 month classified employees in the bargaining unit: New Year's Day, President's Day, Memorial Day, Independence Day, Labor Day, Veteran's Day, Thanksgiving Day and the day after, December 24th and December 25th. All other employees in the Association will be paid for the following 5 holidays: Labor Day, Veteran's Day, Thanksgiving Day, President's Day and Memorial Day. Employees, who work the scheduled workday before and after July 4th as part of their regular contracted schedule, will also receive Independence Day as a paid holiday.

10.2 When a holiday falls on a Saturday the preceding Friday will be the holiday. When a holiday falls on Sunday the following Monday will be the holiday.

- 10.3 An employee will be compensated for the holiday as though he/she worked their regular schedule for the day. An employee who is required by the administration to work on any of the above named holidays shall receive the overtime rate for all hours worked in addition to his/her regular holiday pay.

ARTICLE 11 - Vacations

- 11.1 All employees on a 12-month schedule shall be entitled to two weeks of paid vacation annually. No vacation shall be used in the first six months of employment with the District. An employee shall be granted one (1) additional week of vacation for service beyond five (5) years, and one (1) additional week of vacation after fifteen (15) years of District employment. Vacation leave shall be credited to the employee at the beginning of each fiscal year. The maximum vacation period shall be four (4) weeks. An employee may be allowed to carry over five (5) days of vacation from one year to the next. Vacations shall be scheduled and approved by the supervisor, who will make reasonable effort to accommodate all requests.

Vacation requests longer than 3 days shall be submitted at least 10 working days in advance and all other vacation leave requests will only require 3 days notice.

ARTICLE 12 – Paid Leave

- 12.1 Sick leave is defined as absence from duty because of an employee's illness or injury. The District will allow each employee in the Association ten (10) days sick leave per school year or one (1) day per month employed, whichever is greater, in accordance with ORS 332.507. Sick leave shall be credited to the employee's account at the beginning of the fiscal year, and use of the leave shall be prorated based on the hours worked. Employees hired after the start of the fiscal year will receive sick leave at the rate of one (1) day per month employed for the first year, prorated on hours worked. The sick leave will be front loaded upon hire.

The District will comply with the Oregon Family Leave Act (OFLA) and the Family Medical Leave Act (FMLA). When applicable accrued sick leave will run concurrently with leave taken in accordance with these laws. The district will allow classified employees to use accumulated paid sick leave for any approved FMLA or OFLA leave.

Paid sick leave may be used to care for members of the employee's immediate family who are ill. Immediate family members are defined as the employee's spouse, same-gender domestic partner, biological child, adopted child, stepchild, foster child, same-gender domestic partner's child, parent, adoptive parent, stepparent, foster parent, parent-in-law, same-gender domestic partner's parent, grandparent, grandchild, and any individual with whom an employee has or had an in loco parentis relationship. Persons "in loco parentis" are those with day-to-day responsibilities to care for or financially support a child, or who had such responsibility for the employee when the employee was a child.

272 12.2 For the purposes of determining and computing times for leaves of absence, a day of leave
 273 shall be the amount of time in an employee's regular day or work. All leave shall be taken
 274 in 15-minute increments.

275 12.3 Bereavement leave with full pay will be granted for each death in the immediate family
 276 during the school year according to the following schedule:

277 a. Death of a spouse – 2 weeks or 10 working days, whichever is less,
 278 b. Death of a mother, father, son or daughter – 1 week or 5 working days.
 279 c. Death of a brother, sister, grandparent or grandchild – 3 working days.
 280 d. Death of a mother-in-law or father-in-law – 2 working days.
 281 e. Death of an aunt, uncle, brother-in-law or sister-in-law – 1 working day.
 282 f. Death of a friend – 1 working day.
 283 * Each day must be taken in increments of at least one-half of that person's scheduled day.
 284 E & F are limited to 3 days per year.

285 The District will comply with FMLA/OFLA laws applicable to bereavement leave.

286 12.4 Three (3) days paid leave will be granted for personal, legal, or family business that the
 287 employee is unable to attend to after regular school hours. Personal leave is subject to prior
 288 approval by the administration and requests for such leave must be made in writing at least
 289 three school days in advance. Employees eligible for vacation days must use all vacation
 290 days before they use personal days.

291 Such days may not be used for extending the following school holiday breaks; Labor Day,
 292 Thanksgiving Break, Winter Break, Spring Break or Memorial Day. At the discretion of
 293 the Superintendent, exceptions may be granted.

294 Classified employees who do not use their personal leave days will be paid out at their
 295 regular hourly rate for their personal leave balance remaining at the end of each fiscal year.

296 12.5 Two (2) days paid professional leave will be granted for attending conferences, workshops
 297 or in-service activities. Professional leave is subject to approval by the administration and
 298 requests for such leave must be made in writing at least three (3) school days in advance.

299 12.6 An employee on maternity leave will be allowed to use accumulated sick leave for that
 300 portion of the leave for which his/her doctor certifies that he/she was physically disabled
 301 and unable to perform her duties due to pregnancy or childbearing.

302 12.7 An employee shall be granted leave with pay for service upon a jury, provided that upon
 303 being excused from jury service during any day, the employee shall return to complete
 304 his/her assignment for the remainder of the employee's regular work day.

305 Example: the employee's regular workday is eight (8) hours. He/she serves four (4) hours
 306 on jury duty, so he/she would be required to work the remaining four (4) hours at school

307 that day. Each employee will ask for payment for time; any payment for such service,
308 other than mileage, will be turned over to the District by the employee.

309 12.8 Each Classified staff member will be allowed to contribute up to sixteen (16) hours of his
310 or her own accrued sick leave days per year to any other classified employee. The receiving
311 employee must have exhausted all of his or her own paid leave before receiving contributed
312 sick leave from a classified employee and may not receive more than forty (40) total
313 donated sick leave hours in one school year.

314 **ARTICLE 13 - Unpaid Leave**

315 13.1 With Board approval the District will grant leaves of absence without pay for up to one
316 year.

317 13.2 An employee on Board approved leave without pay shall, be returned to a position in their
318 classification at the end of the leave.

319 13.3 The District will comply with FMLA and OFLA specifically in relation to allowing
320 employees who have exhausted their paid leave to use unpaid leave until FMLA and OFLA
321 protected time is exhausted. They will also be able to maintain their group medical
322 coverage at their own cost subject to COBRA laws and restrictions. The employee must
323 request this action be taken.

324 13.4 Employees who have exhausted their sick leave and do not qualify for FMLA or OFLA
325 leave due to their length of service or FTE shall be allowed leave without pay until the
326 condition that placed them on sick leave is remedied or for a period not exceeding one year,
327 whichever is less. The employee must provide the District with a written statement and
328 documentation from their treating physician. The documentation must state when the
329 employee is expected to return to work.

330 13.5 If an employee has expended their personal leave, two (2) days of unpaid leave not
331 otherwise covered by other District leave policies may be granted with prior approval by
332 the Superintendent.

333 **ARTICLE 14 - Employment and Assignment**

334 14.1 New employees will be placed on probationary status for the first 80 working days of
335 employment. During this time they will have an opportunity to demonstrate their
336 competence for a particular job. At the end of the probationary period the supervisor may
337 perform an evaluation. If their performance is not satisfactory the District may consider
338 reassignment or termination.

339 14.2 Reclassification of personnel is a District right and is the responsibility of the
340 Superintendent. A request for reclassification or job description change may be submitted,
341 through the Association, by any classified employee. The Superintendent shall approve or

342 deny the change within ten (10) working days and notify, in writing, the employee and the
343 Association of the decision.

344 14.3 If an employee's job description is changed, the employee's wage shall be subject to
345 renegotiation. The Superintendent shall notify the Association President of any change in
346 job description.

347 14.4 The District shall provide each classified employee represented by the provisions of this
348 contract with a job description that outlines the major duties and responsibilities of each
349 employee in the unit. This job description shall be given to the employee upon
350 employment, or as soon as it is available. The District will also provide a calendar of
351 workdays. Days marked off on the calendar shall indicate regular work days.

352 14.5 All classified bargaining unit jobs will be posted both internally and externally
353 simultaneously. Any qualified bargaining unit in-house candidate who applies will be
354 granted an interview.

355 14.6 When an employee is promoted or reclassified to a higher paying position, the employee
356 shall be moved to the step on the new wage schedule as he/she held in the former position.

357 14.7 When an employee transfers to a lower paying position the employee shall be placed on
358 the same step (on corresponding years) on the new wage schedule as he/she held in the
359 former position.

360 14.8 Number of years of service will be based on date of hire in all regular full time (6 hours
361 per day or more) and part time classified positions. Extra duty or substitute positions will
362 not be considered in determining year of service for placement on the wage schedule.

363 14.9 When a reduction in the number of contract days for Classified staff members is being
364 considered, the Administration agrees to consult with all parties involved prior to making
365 the final decision.

366 14.10 The District will notify our local OSEA president each time a new classified employee is
367 hired or ends employment.

368 **ARTICLE 15 - Reduction in Force/Seniority**

369 15.1 Layoff

370 Layoff is defined as the complete elimination of a specific position or as a permanent
371 reduction of more than one (1) hour per day.

372 The District shall determine when a layoff is necessary and which job assignments will be
373 affected. When the Board has formally determined a layoff is necessary, it will notify the

Association in writing at least thirty (30) workdays prior to the layoff, except in the case of an emergency.

Seniority shall be defined as the length of continuous service for the District (any of the buildings) from the original date of hire within the bargaining unit. Seniority shall not accumulate while an employee is on an unpaid leave of 30 or more calendar days.

Classifications are defined as the individual job titles listed on the salary schedule in the appendices. Classification groups include classifications (job titles) that are similar and related in nature and generally progress upwards in terms of job responsibilities and wages.

The District will use the following procedures to implement a layoff:

1. Layoff will occur by classification, with the least senior employee in the affected classification being laid off. In unique circumstances the District may retain an employee with less seniority than one being laid off when the District can demonstrate that the less senior employee possesses specialized skills necessary to the performance of the job and that the more senior employee does not possess those specialized skills. Persons being considered for layoff, that have worked in more than one job classification, shall be considered for all positions in which they performed.

2. Employees identified for layoff who have worked in a different classification shall have the ability to bump back into that classification provided they have greater seniority than another employee currently working in that classification. In these circumstances, the bumping employee must still possess the skills and competence necessary to perform the tasks of the former classification. Employees identified for layoff in a classification which is included in a classification group, may bump downward into a lower classification within that group provided they have greater seniority than another employee currently working in the lower classification. In these circumstances, the bumping employee must possess the skills necessary to perform the tasks of the lower classification. A skills test will be agreed upon by the District and the Association.

3. If two or more employees have equal seniority and skill sets, a drawing will be conducted in conjunction with OSEA to determine the senior employee for the layoff process.

15.2 Recall

Recall from a layoff shall be in reverse order of layoff within a classification for a period of up to twenty-seven (27) months. Employees shall be notified by certified mail at the

410 last address of record on file with the District when a position becomes open for which
411 they are qualified.

412 A laid off employee shall be considered laid off until reinstated in the District or the twenty-
413 seven (27) month period elapses. If an employee fails to respond within ten (10) calendar
414 days of notification to a written offer of a position made by the District or if the employee
415 submits a written resignation, then that person's name shall be taken off the recall list. All
416 benefits, including seniority, to which an employee was entitled at the time of his/her
417 layoff, will be restored upon his/her return to active employment.

418 The Board shall not fill a bargaining unit position for which an employee laid off under
419 this Article is qualified without first offering the position to a qualified employee who is
420 on the recall list.

421 An employee will not forfeit his/her rights to recall should he/she take a job within the
422 District in a lower paying position. Employees who were full time prior to layoff who
423 accept a part time position with the District shall remain on the recall list for recall to full
424 time employment until the end of the twenty-seven (27) month recall period. An employee
425 on layoff shall not forfeit his/her recall rights if he/she refuses an offer of employment that
426 is less than his/her former compensation level unless the position is within the same
427 classification group.

428 15.3 Subject to the rules and regulations of the insurance provider and at the expense of the
429 employee, a laid off employee shall be allowed at his/her discretion to continue under all
430 or any part of the District insurance programs by directly paying the premiums while he/she
431 is on the layoff list. Employees who are laid off may remain in the District's group
432 insurance programs at their own expense for a maximum of eighteen (18) months subject
433 to OEGB and COBRA regulations. Premiums for such coverage must be paid directly to
434 OEGB. The parties agree that the District shall be held harmless from all damage or injury
435 incurred by the termination of insurance coverage due to payment not being received in
436 time.

437 This provision is contingent upon insurance carrier regulations.

438 15.4 For seniority purposes, employees who are laid off and subsequently reinstated within
439 twenty-seven (27) months shall retain cumulative seniority for all period of work except
440 for the period of layoff.

ARTICLE 16 - Grievance Procedure

16.1 Definitions:

- A. "Contract Grievance" shall mean a complaint by an employee or group of employees that there has been to his/her/them a violation of inequitable application of any provision of the contract.
- B. "Aggrieved" is the person or persons who has the contract grievance and is presenting the complaint, also referred to as the complainant.
- C. The "Party in Interest" is either the person or persons making the complaint or the person or persons against who the complaint is made.
- D. "Consultant" is the one who advises either party in interest.
- E. "Representative" is the one who may speak for and/or advise a party in interest.
- F. "Immediate Supervisor" is the one who has direct administrative or supervisory responsibilities over the aggrieved in the area of grievance as stated in School Board Policy.
- G. "Days" – The term "days" when used in this article shall, except where otherwise indicated, mean the aggrieved working days.
- H. "Persons Officially Involved" means the Superintendent, his/her representative and/or consultant, the aggrieved, his/her representative and/or consultant, and witnesses.
- I. "Association" – the Oregon School Employees Association, Chapter 171.

16.2 General Procedures

- A. These procedures should be processed as rapidly as possible, the number of days indicated for settlement or appeal at each level should be considered a maximum. The time limits can be extended by written mutual consent of the parties involved at any level of the procedures.
- B. All parties should attempt to complete the procedures by the end of the school year. The parties shall make good faith effort to shorten the number of days provided at the various steps in order to finish by the end of the school year and avoid, if possible, carrying the process into the summer vacation period or the following school year.
- C. All parties in interest have a right to consultants or representatives of their own choosing at each level of these grievance procedures.
- D. There shall be no restraint, interferences, discrimination, or reprisal exerted on any employee choosing to use these procedures for resolution of contract grievances.
- E. Failure at any level of these procedures by the aggrieved to appeal a contract grievance to the next level within the specified time limits shall be deemed to be acceptance of the decision rendered at that level. Failure at any level of this procedure to communicate the decision in writing on a contract grievance within the specified time limits shall permit the aggrieved to proceed to the next level.
- F. All documents, communications, and records of a contract grievance will be filed in the District office separately from the personnel files. References to the records, such as a summary, should be placed in the appropriate personnel file(s).

- 483 G. Every effort will be made by all parties to avoid interruption of classroom and/or
484 any other school sponsored activities.
- 485 H. Every effort will be made by all parties to avoid the unnecessary involvement of
486 students in the grievance procedure.
- 487 I. All parties in interest will process contract grievances after the regular work day or
488 at other times, which do not interfere with assigned duties.
- 489 J. Each contract grievance shall be initiated within ten (10) days after the occurrence
490 of the cause for the complaint; however, if the aggrieved did not become aware of
491 the occurrence until after the date, he/she must initiate action within the ten (10)
492 days following his/her first knowledge of the cause, in failing to thus initiate action
493 he/she may be considered to not have a reasonable grievance.
- 494 K. Financial Responsibility: Each party shall pay any and all costs incurred by said
495 party. Costs for the services of any arbitrator, including per diem expenses, if any,
496 and actual necessary travel, subsistence expenses and the cost of the hearing room
497 shall be borne equally by the District and the Association.
- 498 L. The grievance procedure will not be used when the aggrieved has resorted to the
499 judicial process.

500 16.3 Level One – Informal and Formal Grievance Level

501 The aggrieved will first discuss his/her contract grievance with his/her principal or
502 immediate supervisor, either individually or through the Association representative, or
503 accompanied by a representative, with the objective of solving the matter informally.

504 If the aggrieved is not satisfied with the disposition of his/her contract grievance, he/she
505 may file a written contract grievance with the immediate supervisor within ten (10) days
506 following the act or condition, which is the basis of his/her complaint. The complainant
507 shall set forth the grounds upon which the complaint is based and the reasons why the
508 aggrieved considered the decision unacceptable. The supervisor shall communicate his/her
509 decision in writing within five (5) days to the aggrieved.

510 16.4 Level Two

511 If the aggrieved is not satisfied with the disposition of the grievance at Level One, he/she
512 may appeal the grievance to the Superintendent within ten (10) days of receipt of the
513 supervisor's decision. The complainant shall set forth the grounds upon which the
514 complaint is based and the reasons why the aggrieved considered the decision
515 unacceptable.

516 Within five (5) days of the receipt of the appeal, the Superintendent will notify all official
517 parties of a hearing to be held within ten (10) days of the receipt of the appeal. The
518 Superintendent shall hear arguments of the Principal / Supervisor and the aggrieved.

519 Attendance at the hearing shall be restricted to persons officially involved. Parties in
520 interest may elect to call witnesses who shall appear individually at the hearing.

521 Within five (5) days of the hearing, the Superintendent shall communicate to the aggrieved
522 and all of the parties officially present at the hearing, his/her written decision that shall
523 include supporting reasons therefore.

524 16.5 Level Three

525 If the aggrieved is not satisfied with the decision of the Superintendent he/she may file a
526 written appeal through the Superintendent to the School Board within ten (10) days from
527 the receipt of the Superintendent's decision. The complainant shall set forth the grounds
528 upon which the complaint is based and the reasons why the aggrieved considered the
529 decision unacceptable.

530 Within five (5) days of the receipt of the appeal, the School Board will notify all official
531 parties of a hearing to be held within ten (10) days of the receipt of the appeal. The Board
532 of Directors shall hear arguments of the Superintendent and the aggrieved. The hearing
533 before the School Board shall be closed unless the aggrieved requests it to be public.

534 Within five (5) days following the hearing, the School Board of Directors shall render a
535 decision in writing to all official parties.

536 16.6 Level Four

537 If the aggrieved person is not satisfied with the School Board's decision he/she may, within
538 ten (10) days request in writing that the Association submit the grievance to arbitration.
539 The complainant shall set forth the grounds upon which the complaint is based and the
540 reasons why the aggrieved considered the decision unacceptable.

541 If the Association determines that the contract grievance has merit it may submit the
542 grievance to arbitration within ten (10) days of receipt of the School Board's decision. The
543 Association shall notify the Superintendent of its intent in writing.

544 Within ten (10) days of such written notice the Board and Association shall attempt to
545 agree upon a mutually acceptable arbitrator. If the parties are unable to agree upon an
546 arbitrator, a request for a list of arbitrators may be made to the Employment Relations
547 Board. The parties shall then be bound by the rules and procedures of the Employment
548 Relations Board.

549 The arbitrator so selected shall confer with the representatives of the Board and the
550 Association and hold hearings promptly and shall issue a decision not later than thirty (30)
551 days from the date of the close of the hearing, or if oral hearings have been waived, then
552 from the date that the final statements and proofs on the issues were submitted to the
553 arbitrator. The arbitrator's decision shall be in writing and shall set forth the findings of
554 fact, reasoning, and conclusions on the issues submitted. The arbitrator shall be without
555 power or authority to make any decisions, which require the commission of an act
556 prohibited by law. The decision of the arbitrator shall be submitted to the District and the
557 Association and shall be final and binding on all parties.

558 **ARTICLE 17 - Separability**

559 17.1 If any portion or provision of this contract is held to be illegal or invalid by operation of
560 law, or if compliance with or enforcement of any provision should be restrained by law,
561 the remainder of the agreement shall not be affected. Upon request by either party,
562 negotiation may be reopened on the item only to arrive at a mutually satisfactory
563 replacement for such portion or provision.

564 **ARTICLE 18 - Funding**

565 18.1 The parties recognize that revenue needed to fund the compensation proved by this
566 agreement must be approved by established budget procedures.

567 All such compensation is therefore contingent upon sources of revenue. The district cannot
568 and does not guarantee any level of employment in the bargaining unit covered by this
569 agreement.

570 **ARTICLE 19 - No Strike Provision**

571 19.1 During the term of the agreement neither the Association nor any persons acting on its
572 behalf will cause, authorize, support or take part in a strike. (A strike is defined as a
573 concerted failure to report for duty or willful absence of an employee from his/her position
574 or stoppage of work in whole or in part from the full, faithful and proper performance of
575 the employee's duties for any purpose whatsoever.)

576 19.2 The District agrees not to lock out any classified employees for the life of this agreement.
577 However, where the Board/District closes school classified will not work.

578 **ARTICLE 20 - Evaluations**

579 20.1 Each employee shall be evaluated in writing at least once per work year. Evaluations shall
580 be based upon the employee's job description and his/her performance on the job in relation
581 to the skills needed. The written evaluation shall be given to the employee for signature.
582 However, the signature does not necessarily mean agreement with the evaluation. The
583 employee may attach a response to the evaluation and have it placed in their personnel file.

584 **ARTICLE 21 – Fringe Benefits**

585 21.1 Oregon Educators Benefit Board

586 The benefit program(s) identified shall be provided only in accordance with the
587 underwriting rules and regulations set forth by the carrier(s) in the policy/policies retained

588 by the policyholder. If there is a substantial change in plan design by the OEBB the parties
589 will enter into interim negotiations pursuant to ORS 243.698.

590 It is understood and agreed that any employee eligible for insurance coverage under any
591 plan offered by OEBB, but who does not meet the requirement for eligibility under this
592 contract, will not be eligible to receive any District contribution. Furthermore, by enrolling
593 in any of the plans any employee who is ineligible for the District contribution agrees to a
594 payroll deduction for the full premiums of selected plans including any administrative fees.

595 District contribution of funds may only be used towards the purchase and /or fees of
596 primary Medical, Dental, or Vision Insurance. No part of the District contribution may be
597 used towards administrative fees imposed by OEBB for any other coverage not listed above
598 or any other costs associated with the insurance programs(s) beyond the negotiated
599 contribution. No “unused employer contribution” funds may be used toward other
600 coverage and/or paid as cash.

601 21.2 Insurance carriers and levels of coverage shall be selected by mutual agreement between
602 the District and the Association. Any participation requirements of OEBB and the carrier
603 must be complied with.

604 21.3 Beginning with the September pay period (for October Premiums) the maximum monthly
605 District contribution towards primary medical, dental, and vision insurance premiums will
606 \$1350 per employee. Any cost exceeding this amount will be borne by employees through
607 payroll deduction.

608 If the employee’s medical plan selection is an OEBB offered HSA plan the difference
609 between the premium cost and the District CAP will be contributed monthly to the
610 employee’s HSA account not to exceed the annual limits allowed by the IRS for HSA
611 contribution. The employee may open an HSA account with any District approved
612 vendor
613

614 The anniversary period for insurance coverage is October 1 through September 30.
615 Employees receiving medical, dental and vision insurance will be covered from October
616 1 of the new school year. Employees hired during the school year will be covered the
617 first of the month following receipt of their first paycheck.

618 21.4 Full time employment is defined as 30 or more hours per week. Employees working 20
619 hours per week through 29 hours per week will receive one-half of the full time benefit.
620 Employees working less than 20 hours per week on a regular basis will not receive medical
621 benefits.

622 21.5 Changes in insurance coverage may be made once each year and must be selected during
623 the OEBB open enrollment period. Coverage adjustments resulting from additions to a
624 family may be made at the time specified in the policy with the insurance providers.

625 21.6 Employees eligible for a District insurance contribution, but who choose not to obtain
626 insurance coverage, may “opt out” in accordance with OEBB terms and regulations.

627 Employees choosing to “opt out” must declare that intention within the first seven (7) days
628 in September. The employee must at that time provide proof of other group coverage and
629 verify by OEBB process they are waiving the OEBB insurance benefit. If an eligible
630 employee chooses to “opt out” or waive his/her insurance coverage, that waiver shall be
631 effective until the next open enrollment period. An employee can reinstate the insurance
632 benefit and forfeit future benefit stipends should there be a “major life event” as defined
633 by OEBB in accordance with the rules and regulations.

634 An eligible employee who “opts out” of the District insurance benefit by meeting the above
635 requirements shall receive a monthly stipend of \$400 in lieu of the contractual insurance
636 coverage unless it is no longer allowed by legislative rule or OEBB mandate. Employees
637 eligible for half benefit (employees working 20 hours per week through 29 hours per week)
638 will be eligible to participate at a half benefit rate. The stipend will be considered taxable
639 income under section 125 benefits.

640 21.7 For classified employees who terminate prior to completing their contract, insurance
641 benefits will end on the month following their last paycheck. For the classified employees
642 terminating and completing their contract, benefits will end as follows:

643 10 Month employees – benefits terminate on September 30

644 11 Month employees – benefits terminate on August 31

645 12 Month employees – benefits terminate on July 31

646 **ARTICLE 22 - Just Cause**

647 22.1 No member of the bargaining unit will be disciplined or dismissed except for just cause.
648 However, this just cause provision does not apply to retention or non-retention in extra-
649 duty positions.

650 22.2 No classified employee shall be formally disciplined without first being informed of the
651 charges, given the opportunity to have representation present and given an opportunity to
652 meet with the charging party and to respond to those charges. The employee’s response
653 may be verbal or in writing. After a decision is finalized, the employees and the
654 Association will be given written notification thereof.

655 **ARTICLE 23 – Wages Placement Schedule**

656 23.1 For the 2019-20 thru 2020-21, school years, the wage schedules shall be as stated in
657 Appendices B and C. Column advances will become effective July 1st of each year.
658 Employees will advance according to the wage tables, with column movement by column

659 headings (one column over each year for the first 5 steps and longevity column movement
660 after steps 10 and 15).

661 23.2 Years of experience in another District will be considered by the administration upon hiring
662 and placement of a new employee on the schedule. In placing new employee the District
663 will consult with the Association on any placement above a level 6 if based on experience
664 outside of a school district.

665 **ARTICLE 24 - Classes and Workshops**

666 24.1 Classified employees may request to take classes/workshops to be paid for by the District.
667 Any request must:

- 668 A. be specifically related to the job and responsibilities of the employee;
- 669 B. have written approval of the principal and Superintendent;
- 670 C. be subject to the availability of funds.

671 No travel expenses will be paid for these classes/workshops and no pay will be provided
672 for time spent except those hours, which may fall within the employee's regular work
673 schedule on that day.

674 When an employee is asked by the District to attend a class or workshop, he/she is eligible
675 to receive travel reimbursement and pay for the hours spent at the session, including their
676 travel time to and from the class or workshop location. The employee must document the
677 extra hours on their monthly time sheet in order to be paid for them.

TERMS OF AGREEMENT

This is a 2 year agreement that covers the 2019-20 and 2020-21 school years. For 2019-20 there is a 5% wage increase to the Custodian 1 Classification Group, a 4% wage increase to the Lead Secretary Classification Group and a 2% wage increase to all other groups. For 2020-21 there is a 5% wage increase to the Custodian 1 Classification Group, a 4% wage increase to the Lead Secretary Classification Group and a 1.5% wage increase to all other groups. Salary schedules are included in the Appendices of this agreement.

The District contribution amount to insurance will be \$1350 for the 2019-20 and 2020-21 school years. It is the District's goal to keep all bargaining groups at the same contribution amount. Therefore when one bargaining group's insurance contribution amount is raised the contribution amount would raise simultaneously for classified employees.

All "past practice" or memorandums of understanding in existence at the time of signing this agreement that are not expressly included in this agreement are considered null and void once this contract is signed.

SIGNATURE PAGE

**THIS AGREEMENT ENTERED INTO THIS ____ DAY OF _____ 2019,
BY AND BETWEEN OSEA CHAPTER #171, HEREIN CALLED THE
“ASSOCIATION.” AND THE YAMHILL CARLTON SCHOOL DISTRICT NO. 1,
YAMHILL COUNTY , OREGON, HEREIN CALLED THE “DISTRICT.” THIS
AGREEMENT SHALL BE IN EFFECT FOR A TWO(2) YEAR PERIOD FROM JULY 1,
2019 TO JUNE 30, 2021.**

**NOW, THEREFORE, THE PARTIES HERETO AGREE TO BE BOUND BY THE
CONVENANTS SET FORTH ON THIS PAGE AND IN THE PRIOR ATTACHED
PAGES.**

**INWITNESS WHEREOF, THE PARTIES HERE AFFIX THEIR SIGNATURES AS OF
THE DATE FIRST HEREIN ABOVE WRITTEN.**

Signed:

**Susan Dehm, President
Oregon School Employees Association
Chapter 171**

Date

**Jami Egland, School Board Chair
Yamhill Carlton School District No. 1**

Date

**Charan Cline, Superintendent
Yamhill Carlton School District No. 1**

Date

Appendix A – Classification Groups

Instructional Assistant	Secretarial	Food Service	Custodial	Maintenance
Instructional Assistant I / ELL Instructional Assistant	Secretary (Attendance, Student Body/Athletics, Alliance, Registrar)	Kitchen Helper	Custodian I	Maintenance / Custodial / Grounds
Instructional Assistant II (Behavior / Life Skills)	Lead Secretary	Cook		Building Maintenance
Library Assistant				Building Maintenance Specialized
SLPA – Speech Assistant				

2019-2020
OSEA Salary Schedule

<u>Classification</u>	<u>1 year</u>	<u>2 years</u>	<u>3 years</u>	<u>4 years</u>	<u>5 years</u>	<u>6 to 10</u>	<u>11 to 15</u>	<u>16 to 20</u>
Instructional Assistants and ELL Specialists	\$ 13.47	\$ 13.86	\$ 14.31	\$ 14.72	\$ 15.17	\$ 16.09	\$ 17.92	\$ 18.45
Instructional Assistant II	\$ 13.99	\$ 14.39	\$ 14.85	\$ 15.28	\$ 15.74	\$ 16.70	\$ 18.60	\$ 19.15
SLPA- Speech Asst	\$ 18.87	\$ 19.45	\$ 20.01	\$ 20.61	\$ 21.24	\$ 22.51	\$ 24.25	\$ 24.58
Library Assistants	\$ 14.03	\$ 14.43	\$ 14.86	\$ 15.33	\$ 15.78	\$ 16.74	\$ 18.64	\$ 19.21
Secretary	\$ 14.58	\$ 15.00	\$ 15.46	\$ 15.92	\$ 16.40	\$ 17.41	\$ 19.42	\$ 19.99
Lead Secretary	\$ 15.45	\$ 15.91	\$ 16.40	\$ 16.86	\$ 17.42	\$ 18.47	\$ 20.57	\$ 21.17
Custodian I	\$ 12.83	\$ 13.22	\$ 13.64	\$ 14.02	\$ 14.45	\$ 15.35	\$ 17.12	\$ 17.63
Maint/Cust/Grounds	\$ 15.78	\$ 16.19	\$ 16.73	\$ 17.24	\$ 17.74	\$ 18.28	\$ 21.00	\$ 21.63
Bldg Maintenance	\$ 17.73	\$ 18.25	\$ 18.83	\$ 19.37	\$ 20.07	\$ 21.13	\$ 23.61	\$ 24.33
Bldg Maint-Specialized	\$ 20.77	\$ 21.39	\$ 22.03	\$ 22.71	\$ 23.61	\$ 24.79	\$ 27.75	\$ 28.60
Kitchen Helpers	\$ 11.54	\$ 11.86	\$ 12.23	\$ 12.62	\$ 12.95	\$ 14.16	\$ 15.33	\$ 15.78
Cook	\$ 13.47	\$ 13.86	\$ 14.31	\$ 14.72	\$ 15.17	\$ 16.09	\$ 17.92	\$ 18.45

2020-2021
OSEA Salary Schedule

<u>Classification</u>	<u>1 year</u>	<u>2 years</u>	<u>3 years</u>	<u>4 years</u>	<u>5 years</u>	<u>6 to 10</u>	<u>11 to 15</u>	<u>16 to 20</u>
Instructional Assistants and ELL Specialists	\$ 13.67	\$ 14.07	\$ 14.52	\$ 14.94	\$ 15.40	\$ 16.33	\$ 18.19	\$ 18.73
Instructional Assistant II	\$ 14.20	\$ 14.61	\$ 15.07	\$ 15.51	\$ 15.98	\$ 16.95	\$ 18.88	\$ 19.44
SLPA- Speech Asst	\$ 19.15	\$ 19.74	\$ 20.31	\$ 20.92	\$ 21.56	\$ 22.85	\$ 24.61	\$ 24.95
Library Assistants	\$ 14.24	\$ 14.65	\$ 15.08	\$ 15.56	\$ 16.02	\$ 16.99	\$ 18.92	\$ 19.50
Secretary	\$ 14.80	\$ 15.23	\$ 15.69	\$ 16.16	\$ 16.65	\$ 17.67	\$ 19.71	\$ 20.29
Lead Secretary	\$ 16.07	\$ 16.55	\$ 17.06	\$ 17.53	\$ 18.12	\$ 19.21	\$ 21.39	\$ 22.02
Custodian I	\$ 13.47	\$ 13.88	\$ 14.32	\$ 14.72	\$ 15.17	\$ 16.12	\$ 17.98	\$ 18.51
Maint/Cust/Grounds	\$ 16.02	\$ 16.43	\$ 16.98	\$ 17.50	\$ 18.01	\$ 18.55	\$ 21.32	\$ 21.95
Bldg Maintenance	\$ 18.00	\$ 18.52	\$ 19.11	\$ 19.66	\$ 20.37	\$ 21.45	\$ 23.96	\$ 24.69
Bldg Maint-Specialized	\$ 21.08	\$ 21.71	\$ 22.36	\$ 23.05	\$ 23.96	\$ 25.16	\$ 28.17	\$ 29.03
Kitchen Helpers	\$ 11.71	\$ 12.04	\$ 12.41	\$ 12.81	\$ 13.14	\$ 14.37	\$ 15.56	\$ 16.02
Cook	\$ 13.67	\$ 14.07	\$ 14.52	\$ 14.94	\$ 15.40	\$ 16.33	\$ 18.19	\$ 18.73

Meal Price Recommendations for 2019-2020

\$3.10 paid YCIS/YCHS Student Lunch (increase of \$.10)

\$2.90 paid YCES Student Lunch (increase of \$.10)

\$1.75 paid Breakfast (increase of \$.65)

\$4.00 paid Adult Lunch (no change)

\$2.50 paid Adult Breakfast (increased \$1.40) – No adult breakfast have been sold in last 2 years