



YAMHILL CARLTON SCHOOL DISTRICT

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

BOARD OF DIRECTORS

REGULAR SESSION AGENDA

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

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

Password: sW66uH

Monday, November 10, 2025

Regular Session: 6:00pm

AGENDA

I. Call to Order Regular Session

II. Flag Salute

III. Individuals, Delegations, Recognitions, and Communications

- A. YCHS - Student Body - Verbal Report
- B. YCHS - Student Spotlight
- C. YCHS - Tanner Smith & Richard Ceder - Verbal Report
- D. YCIS - Amanda Dallas & Chad Tollefson - Verbal Report
- E. YCES - Morgan Bishop - Verbal Report

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

IV. Review of Agenda (Action Item)

V. Regular Session – Consent Agenda (Action Item)

- A. Approval of Board of Directors Minutes
 - 1. Regular Session Minutes: 10/14/25
 - 2. Work Session Minutes: 10/28/25
- B. Personnel
- C. Enrollment
- D. Surplus

VI. Announcements and Reports

- A. Superintendent's Report – Clint Raever – Verbal Report
- B. District Facilities Report – Ian Barr – Verbal Report
- C. Financials & List of Bills for October 2025 – Melanie Neece (Action Item)

VII. New Business

- A. Superintendent Evaluation Tool for the 25-26 School Year Discussion
- B. Approve Superintendent Evaluation Timeline for the 25-26 School Year (Action Item)
- C. First Read of Policies:
 - 1. Student Transportation in Private Vehicle (EEAE)
 - 2. Use of Private Vehicles for District Business (EEBB)
- D. New AR Policy:
 - 1. Proof of Vehicle Liability Insurance (EEAE-AR)

VIII. Board of Directors Comments

IX. 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.



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

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Password: sW66uH

Tuesday, October 14, 2025

Regular Session: 6:00pm

Board Members Present: Susan FitzGerald, Buzz Ready, Erin Galyean, JaJetta Dumdi, Chris Zook

DO/Administration Present: Clint Raever, John Horne, Melanie Neece, Mary Brown, Ian Barr, Richard Ceder, Tanner Smith, Morgan Bishop, Amanda Dallas, Chad Tollefson

Others Present: Bett Patt-McKinney, Michelle Partin, Lucas Partin, Chyna Hayward, Kimberly Navarro, Luke O'Halloran

MINUTES

Meeting Recording

I. Call to Order Regular Session

S.FitzGerald called the meeting to order at 6:00pm.

II. Flag Salute

III. Individuals, Delegations, Recognitions, and Communications

A. YCHS - Student Body - Verbal Report

-L.Partin reported.

-The boys' soccer team has a shot at State this year.

-Last year, both the boys' and girls' soccer teams did not get any red cards which is very rare. Only four teams in Oregon did not get any.

-The leadership team was busy this month with homecoming. The theme was Night on the Bayou and the decorations were awesome. They had 25 less students attend than last year, but that was expected since the football game was delayed by thirty minutes due to a lighting delay in the first quarter.

-They had a lot of student participation during spirit week.

-They are now moving onto service projects and the canned food drive is coming up.

-They are also working on having greeting groups to greet students as they walk in the door every day.

-The OASC conference is coming up and they will be leading a workshop there this year. Last year they won the Gold Council Leadership Award.

B. YCIS - Student Spotlight

-The student who planned to present tonight is ill. Tina and Chyna Hayward presented in her place.

-They provided an update on the implementation of Social-Emotional Learning and Growth Mindset initiatives at YCIS. (see attached presentation)

-The SEL program includes Wayfinder, Tiger Time small group interventions, and growth mindset classes.

-The integration of SEL and Growth Mindset at YCIS is cultivating stronger social skills, emotional awareness, and respectful relationships, all of which are foundational for student success both inside and outside the classroom.

-Progress is monitored with assessments through Wayfinder. The students completed an assessment at the beginning of the year and they will have a few more assessments throughout the year.

C. YCHS - Tanner Smith & Richard Ceder - Verbal Report

-T.Smith and R.Ceder presented a PowerPoint that included on-track rates, students of the month, attendance recognition, and upcoming events.

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- They shared their strategies for helping students who are failing classes and how J term will be immensely helpful in getting their grades up.
- They had the first study table for athletes and only six had to attend.
- The Big Lars Foundation reached out to R.Ceder and would like to help support the school's athletic program. R.Ceder will be meeting with them in the coming weeks to work out the details.
- T.Smith shared information about the ELEOT tool (Effective Learning Environments Observation Tool). This tool allows the evaluations of the learning environment and not just the teachers. They used the tool during their walkthroughs of all three schools. The next step is to go back and work with staff on how to use the tool.
- C.Raeever stated that through this process they will be able to identify the teachers who have a high rate of student engagement and then have other teachers observe them.

D. YCIS - Amanda Dallas & Chad Tollefson - Verbal Report

- A.Dallas provided an update on recent and upcoming events at YCIS including celebrating Custodian Appreciation Day, sports updates, student leadership, the harvest festival, and fall conferences. (see attached report and flyers)
- The Fall Festival will be held on October 24th. They will have trick or treating, food trucks, pumpkin decorating, and a haunted hallway.
- Fall conferences will be held the 30th and the 31st of October. The 30th will be an open house set up and the 31th will be by appointment.
- A.Dallas reviewed the fall benchmark data for DIBELS and iReady. The reason there is a lot of red is because they are tested based on end of the year standards. They are doing targeted interventions during Tiger Time.
- They are using Wayfinder and not DESSA this year. One nice thing about Wayfinder is that it uses the same assessment as the lessons so lessons can be chosen based on the areas with the lower scores.
- Regarding MTSS, the team has decided to continue to focus on SEL both with the adults and the students.
- They are just beginning the GATE meetings. So far, they have only done 4th and 5th grade meetings.

E. YCES - Morgan Bishop - Verbal Report

- M.Bishop provided an update on recent and upcoming events at YCES including celebrating Custodian Appreciation Day, improving attendance, Tiger Run, Halloween activities, and in-service day. (see attached report and flyers)
- One of the priorities this year is to improve attendance. Fallen Hepp, the STEAM teacher joined an attendance cohort through the WESD where she is looking at data and getting ideas to improve the systems for attendance.
- During the in-service day, they had a professional development class ran by the staff that attended the EL academy over the summer. Staff learned and practiced how to use AI effectively.
- M.Bishop reviewed the fall benchmark data for Dibels and iReady. Kindergarten always looks rough because they've never taken the test before and it is a whole new process for them to learn.
- The board expressed their concern about the 3rd grade group. M.Bishop stated Beth Patt-McKinney is the new reading teacher. She is starting a new intervention curriculum for the second dose of interventions.

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IV. Review of Agenda (Action Item)

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

V. Regular Session – Consent Agenda (Action Item)

- A. Approval of Board of Directors Minutes
 - 1. Regular Session Minutes: 9/16/25
- B. Personnel

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C. Enrollment

D. Donations

-J.Dumdi noticed that the Alliance numbers have dropped quite a bit from last month. John stated that the numbers fluctuate a lot during the first month and they expected the number to be close to what it currently is.

-E.Galyean asked if the high school is still looking into an online option. T.Smith stated they are still looking into it, with the possibility of a hybrid option. It is a big undertaking to start this type of program and everyone needs to be on board. C.Raever stated that right now the biggest concern is whether or not the district can afford to start that type of program.

-J.Dumdi motioned to approve the agenda as presented. B.Ready seconded. All in favor. Motion carried.

VI. Announcements and Reports

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

-C.Raever provided an update on several topics, including the fall newsletter, InTouch software implementation, instructional rounds, the Wide Open Spaces conference, and the fall regional OASE meeting.

-T.Smith did an exceptional job representing the district on the WESD panel that allowed him to share how the district uses the Oregon Data Suite to support the MTSS system.

-C.Raever shared the Oregon assessment data that was just released. (see attached) The board discussed the data, challenges with the state assessment, and the need for better alignment between state assessments and local assessments.

-C.Raever recognized Shelly Ready, who is leaving the district after 16 years of serving in multiple roles in the district. They have hired her replacement, Holly Perin-Haviland, as her replacement. She has 20 years of school finance experience.

B. District Facilities Report – Ian Barr – Verbal Report

-I.Barr provided an update of the facilities work being done.

-They have been working on getting fall spraying done.

-They are making progress on the HVAC units at the elementary school.

-They will be replacing the sprinkler valves at the elementary school.

-The loading dock door was replaced today at the intermediate school. They will be able to use it again for what it is actually designed for.

-He is going to start working on the courtyard drains before the heavy rains come.

-Fertilizing at the high school will be done this week.

-They finally got the booster pump back for the irrigation system.

-He is excited to be coaching middle school wrestling that will start on the 20th.

C. Financials & List of Bills for September 2025 – Melanie Neece (Action Item)

-M.Neece reviewed the financials and list of bills.

-J.Dumdi appreciated the note about the government shutdown. Once the audit is over, M.Neece will run some figures and a couple scenarios to share with the board.

-E.Galyean motioned to accept the Financial Report and List of Bills for September 2025 as presented.

J.Dumdi seconded. All in favor. Motion passes.

VII. New Business

A. Division 22 Report

-C.Raever reviewed the Division 22 report. This is a yearly report that is sent to ODE that shows the district's compliance with the laws that govern K-12. The OARs for each category list all the items needed to be in compliance.

-In 2024-2025, the only item the district was not in compliance with was Career Education.
-The district will quickly come into compliance due to new software now being used for career exploration. The high school is now using CIS (Career Information System). For the intermediate school, they are using Wayfinder which has a career exploration curriculum. For the elementary school, this is done through SEL classes, to help them build their soft skills.
-The next step is to submit the report to ODE, as well as the district's plan and estimated timeline for completion.

B. 2024-2025 Integrated Plan Annual Report

-C.Raever explained the Integrated Programs Report. (see board packet)
-C.Tollefson reviewed the report with the board. He outlined the three narrative questions required for the annual report, focusing on local performance growth targets, improved academic achievement, and increased sense of safety and well-being.
-ODE gives the goals and the targets and then asks the district to show their efforts in accomplishing them.
-C.Tollefson asked if there was any public comment in regards to this report. M.Brown replied there was not.

C. Adopt New Policies:

1. Personal Electronic Devices (JFCEB)
2. Request for Personal Electronic Devices Exception (JFCEB-AR)

-C.Raever stated the only addition since the first read of the policy was a line stating to refer to the student handbook for disciplinary action.
-E.Galyean motioned to adopt policies JFCEB and JFCEB-AR as presented. J.Dumdi seconded. All in favor. Motion passed.

VIII. Board of Directors Comments

The board agreed to schedule a work session for November 18th.

IX. Adjournment

S.FitzGerald adjourned the meeting at 7:59pm.



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Tuesday, October 28, 2025

Work Session: 6:00pm

Board Members Present: Erin Galyean, Buzz Ready, JaJetta Dumdi, Chris Zook

District Office Members Present: Clint Raever, Mary Brown

Others Present: Kyle Laier, Carol Fenstermacher

MINUTES

Meeting Recording

I. Call to Order Work Session

E.Galyean called the meeting to order at 6:00pm.

II. Flag Salute

III. Polling Results

-K.Laier and C.Fenstermacher shared a pre-bond presentation that included the results of the September polling. (see attached PowerPoint).

-The presentation included timeline phases, community polling results, building community support, and legal and ethical guidelines.

-They emphasized the need for the district to enhance communication and engagement with the community through events and outreach efforts. The board discussed the best ways to do this and what those efforts would look like.

-E.Galyean mentioned that the OSBA Bonds and Ballots conference will be on February 6th. M.Brown will send out the information to the board.

IV. Superintendent Goals Update

-C.Raever provided an update on his goals (see attached document).

-Each of the five goals has a target, indicators, a timeline for completion, and the status.

-All goals are in progress except for goal 4 target 3. This is establishing the Superintendent Office Hours. He is struggling to find a set time due to his fluctuating schedule.

-The artifacts to show his progress include a visitation and monthly in-person log, emails, PD survey, admin agenda plan, monthly principal meetings, calendars, and more.

V. Adjournment

E.Galyean adjourned the meeting at 8:06pm.

Yamhill Carlton School District

Human Resources

Board Report

November 10, 2025



New Hires

Amaya Vacheron, YCES Instructional Assistant - Life Skills
Holly Haviland, YCSD Payroll/Accounts Payable Specialist
Ian Barr, YCIS Wrestling Coach

Resign/Retire/Term Employees

Nikita Williams, YCSD Music or Art Teacher

Current Employees: Position Changes

None

Open Positions For 2025-2026

YCIS/YCHS Instructional Assistant - Behavior
YCSD Music or Art Teacher

Yamhill Carlton School District Enrollment Report

November

2025

District Enrollment for 2025-26 School Year

	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
YCES	275	279	274							
YCIS	380	375	373							
YCHS	281	273	271							
Alliance	168	150	153							
Total	1,104	1,077	1,071	-	-	-	-	-	-	-
24/25 Total	1,094	1,086	1,090	1,087	1,089	1,077	1,065	1,067	1,068	1,062
23/24 Total	1,101	1,101	1,093	1,090	1,088	1,080	1,083	1,087	1,098	1,094
22/23 Total	1,118	1,110	1,108	1,098	1,098	1,103	1,098	1,102	1,106	1,096
21/22 Total	1,029	1,028	1,038	1,032	1,029	1,028	1,023	1,023	1,022	1,016
20/21 Total	1,067	1,064	1,064	1,063	1,054	1,038	1,048	1,039	1,028	1,043
19/20 Total	1,060	1,067	1,065	1,060	1,053	1,043	1,034	1,045	1,045	1,044

YCES Enrollment for 2025-26 School Year

	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
Kindergarten	68	69	68							
1st Grade	55	58	55							
2nd Grade	75	75	74							
3rd Grade	77	77	77							
25/26 Total	275	279	274	-	-	-	-	-	-	-
24/25 Total	274	273	274	271	274	273	269	271	269	269
23/24 Total	284	284	282	279	280	282	285	288	290	291
22/23 Total	301	297	299	299	297	297	298	304	306	307
21/22 Total	265	269	271	264	273	274	270	268	268	266
20/21 Total	231	229	230	228	225	221	225	223	223	223
19/20 Total	362	365	366	361	363	361	358	364	367	366

YCIS Enrollment for 2025-26 School Year

	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
4th Grade	78	79	78							
5th Grade	72	71	72							
6th Grade	96	94	94							
7th Grade	54	54	53							
8th Grade	80	77	76							
25/26 Total	380	375	373	-	-	-	-	-	-	-
24/25 Total	367	367	370	370	369	362	367	368	368	369
23/24 Total	348	344	345	345	345	348	352	355	361	360
22/23 Total	332	329	330	325	322	328	322	321	325	324
21/22 Total	343	342	347	349	351	348	343	347	349	345
20/21 Total	291	287	276	276	272	273	282	291	282	282
19/20 Total	308	312	311	313	307	303	303	307	307	307

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

YCHS Enrollment for 2025-26 School Year

	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
9th Grade	83	78	76							
10th Grade	68	66	66							
11th Grade	64	64	62							
12th Grade	66	65	67							
Transition	-	-								
25/26 Total	281	273	271	-	-	-	-	-	-	-
24/25 Total	281	278	275	274	273	272	265	265	267	261
23/24 Total	289	292	283	283	281	271	269	268	270	270
22/23 Total	293	290	288	284	290	285	286	285	284	278
21/22 Total	284	283	285	285	278	281	281	278	276	277
20/21 Total	290	290	292	290	290	290	291	291	276	291
19/20 Total	299	300	298	295	295	290	286	287	284	284

Alliance Academy Enrollment 2025-26

	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
Kindergarten	10	9	9							
1st Grade	25	24	26							
2nd Grade	14	14	14							
3rd Grade	19	19	20							
4th Grade	16	15	15							
5th Grade	32	26	26							
6th Grade	12	13	13							
7th Grade	16	15	15							
8th Grade	14	9	9							
9th Grade	8	4	4							
10th Grade	2	2	2							
11th Grade	-	-	-							
12th Grade	-	-	-							
25/26 Total	168	150	153	-	-	-	-	-	-	-
24/25 Total	172	168	171	172	173	170	164	163	164	163
23/24 Total	180	181	183	183	182	179	177	176	177	173
22/23 Total	192	194	191	190	189	193	192	192	191	187
21/22 Total	137	134	135	134	127	125	129	130	129	128
20/21 Total	255	258	266	269	267	254	250	234	247	247
19/20 Total	91	91	91	92	89	90	88	88	88	88

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



Surplus November 2025

YCHS two broken chairs



YAMHILL CARLTON SCHOOL DISTRICT

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Date: November 5, 2025

To: Yamhill Carlton School District Board of Directors

From: Melanie Neece, Director of Fiscal Services

Subject: October 2025 - Financial Statements and Summary

Board Members,

Please find attached the financial statements for the 2025-26 fiscal year through October 31, 2025.

General Fund Status - We estimate our **General Fund Ending Fund Balance** to be approximately **\$1.2 million**. Of this total, approximately \$55,900 is the unappropriated ending fund balance, with the remainder reflecting our estimated Non-Resolution Fund Balance, which includes contingencies.

Financial Statements Overview

The attached statements include activity for the following funds: 100 General Fund, 200 Restricted – Special Revenue Funds, 300 Debt Service Fund, 400 Capital Projects Fund, 700 Trust and Agency Funds, and Balance Sheet Accounts for all funds.

The Statement of Revenues and Expenditures shows the Budget vs. Actuals for the period and projects through the fiscal year-end. An appropriations summary for all funds is also included. I have not projected revenues or expenditures for 200-700 funds, as they are generally limited by the revenue collected and are designated for specific uses.

Check and Investment Activity

The district issued checks **62506-62602**, totaling **\$271,857.28**, for the period ending October 31, 2025. The LGIP investment pool earned dividends of **\$25,626.82**. The monthly distribution yield rate has dropped slightly from **4.60% to 4.57%**. These funds are posted under revenue code 1510 on page 2 of the financial summary.

Government Shutdown - Potential Funding Impacts

Federal funding delays are expected to temporarily affect Oregon Department of Education (ODE) reimbursements, particularly for programs such as Child Nutrition (CNP), Title, and IDEA grants. We are monitoring the situation closely and coordinating with ODE to minimize impacts. At this time, the issue appears to be a delay in the timing of reimbursements rather than a reduction in funding.

However, Oregon schools are facing a real possibility of midyear budget cuts that are currently projected at 2.5% - 5% statewide due to reduced state revenue from new federal tax policies and rising unemployment.

The next Oregon Department of Education (ODE) revenue forecast, is scheduled for release on **November 19**, and is expected to further clarify and potentially deepen the projected impact, prompting education leaders to urge lawmakers to use the \$1.2 billion Education Stability Fund to prevent layoffs and program cuts similar to the 2008 recession.

Please let me know if you have any questions or concerns regarding these statements.

Thank you.

Yamhill-Carlton SD
Statement of Revenues Budget Vs. Actual
For the Fiscal Year 2025-2026
As of 10/31/2025

	Adopted 2025-26 Budget	Actual YTD Rev. 10/31/2025	Projected 11/1/2025 Thru 6/30/2026	Total Estimated 2025-26	(Over)/Under Budget	Actuals 2024-25 6/30/2025	Budget 2024-25
Resources - Revenues							
SSF Funding							
1111 Current Year Property Taxes	\$ 4,580,000	\$ -	4,580,000	\$ 4,580,000	\$ -	4,416,789	4,285,000
1112 Prior Year's Property Taxes	-	39,452	-	\$ 39,452	(39,452)	74,360	60,000
1114 In Lieu of Property Taxes	-	-	-	\$ -	-	335	-
1190 Interest on Tax Collections	-	6,877	-	\$ 6,877	(6,877)	16,528	10,000
3101 State School Support Funds	9,426,877	3,850,866	5,576,011	\$ 9,426,877	-	8,687,756	8,792,799
3103 Common Schools	-	-	-	\$ -	-	161,386	149,455
3199 State Other Unrestricted Grants	-	-	-	\$ -	-	49,807	50,000
3299 State Grants	-	-	-	\$ -	-	56,941	-
							0
Total SSF Funding	14,006,877	3,897,195	10,156,011	14,053,206	(46,329)	13,463,903	13,347,254
Other School Support Funding							
4519 Federal Edu Jobs Funding	-	-	-	-	-	-	-
4500 Federal SFSF	-	-	-	-	-	-	-
Total Other School Support							
Total SSF Revenue	14,006,877	3,897,195	10,156,011	14,053,206	(46,329)	13,463,903	13,347,254
Non State School Support Formula Sources							
Local Sources							
1300 Tuition	244,180	50	244,130	244,180	-	240,590	176,920
1411 Transportation Fees	-	-	-	-	-	9,540	-
1510 Earnings on Investments	100,000	110,200	(10,200)	100,000	-	394,114	40,000
1710 Athletic Fees	46,500	19,339	27,161	46,500	-	51,041	52,525
1910 Rentals	-	-	-	-	-	-	-
1960 Recovery of Prior Year Exp	-	-	-	-	-	-	-
1980 Fees Charged to Grants	55,194	-	55,194	55,194	-	63,445	56,044
1990 Miscellaneous Local Revenue	40,000	33,124	6,876	40,000	-	46,913	27,575
Total Non Formula Local Sources	485,874	162,713	323,161	485,874	-	805,644	353,064
Intermediate Sources							
2000 Intermediate Resources	190,000	-	190,000	190,000	-	201,828	200,000
Other Sources							
5300 Sale of Fixed Assets	-	-	-	-	-	30,250	-
5400 Beginning Fund Balance	3,430,946	-	3,612,106	3,612,106	(181,160)	3,518,892	3,040,000
Total Non SSF Revenue	4,106,820	162,713	4,125,267	4,259,121	(181,160)	4,556,613	3,593,064
Total Resources	\$ 18,113,697	\$ 4,059,908	\$ 14,281,278	\$ 18,312,327	\$ (227,489)	\$ 18,020,516	\$ 16,940,318
		Less Estimated Requirements (pg 3)		\$ (17,110,465)			
		Estimated Ending Fund Balance		\$ 1,201,862			

Expenditure Functions	Adopted 2025-26 Budget	Actual YTD Exp. 10/31/2025	Projected 11/1/2025 Thru 6/30/2026	Total Estimated 2025-26	(Over)/ Under Budget	% Committed	Total Actuals 6/30/2025	2024-25 Budget
Instruction								
1111 K-5 Elementary Programs	\$ 1,660,979	\$ 268,259	1,296,972	\$ 1,565,231	\$ 95,748	94.24%	\$ 1,391,462	\$ 1,767,207
1113 K-5 Elementary Extracurricular	6,011.00	409	5,569.87	5,978.56	32.44	99.46%	\$ 3,690	\$ 3,710
1121 Intermediate Programs	1,735,338.00	297,836	1,377,043.21	1,674,878.93	60,459.07	96.52%	\$ 1,512,094	\$ 1,446,800
1122 Intermediate Extracurricular	94,220.00	19,935	36,176.58	56,111.85	38,108.15	59.55%	\$ 46,357	\$ 87,955
1131 High School Programs	1,873,750.00	325,315	1,458,235.18	1,783,550.34	90,199.66	95.19%	\$ 1,592,832	\$ 1,714,011
1132 High School Extracurricular	388,479.00	89,811	232,597.36	322,407.94	66,071.06	82.99%	\$ 297,892	\$ 358,939
1210 Programs for Talented and Gifted	2,000.00	9	8.99	17.98	1,982.02	0.90%	\$ 337	\$ 2,000
1220 Programs for Students w/Severe Disabilities	1,784,280.00	253,652	1,442,177.31	1,695,829.54	88,450.46	95.04%	\$ 1,391,922	\$ 1,556,293
1250 Special Education	524,097.00	112,702	411,395.43	524,097.00	-	100.00%	\$ 466,342	\$ 481,600
1280 Alternative Programs Credit Recovery	58,143.00	3,119	37,433.05	40,551.99	17,591.01	69.75%	\$ 45,554	\$ 65,315
1281 Alternative Programs	16,000.00	13,859	-	13,858.65	2,141.35	86.62%	\$ 30,128	\$ 44,500
1285 District Alt Programs - Alliance Academy	831,158.00	139,378	529,977.54	669,355.65	161,802.35	80.53%	\$ 686,996	\$ 853,062
1291 English Language Learner ORS 366.079	135,121.00	17,868	115,117.09	132,985.28	2,135.72	98.42%	\$ 122,668	\$ 124,638
1400 Summer Programs High School	26,090.00	-	8,022.85	8,022.85	18,067.15	30.75%	\$ 2,404	\$ 7,817
1410 Summer Programs Elementary	2,208.00	1,984	-	1,983.93	224.07	0.00%	\$ 1,642	\$ 2,155
Total Instruction	9,137,874	1,544,135	6,950,727	8,494,862	643,012	92.96%	7,592,320	8,516,002
Support Services								
2110 Attendance & Social Work	73,226	15,522	57,703	73,226	0	100.00%	82,041	68,306
2120 Guidance Services	17,000	39,682	(28,701)	10,981	6,019		295,303	12,750
2130 Health Services	331,186	5,023	326,163	331,186	0		45,331	291,767
2140 Psychological Services	51,200	-	-	-	51,200	0.00%	-	51,200
2150 Speech Pathology Audiology Services	70,404	11,690	58,715	70,404	(0)		66,987	65,410
2190 Student Support Services Direction	122,187	39,850	82,337	122,187	(0)	0.00%	119,485	111,073
2210 Improvement of Instruction Services	26,550	1,275	-	1,275	25,275		1,148	25,690
2220 Educational Media/Library Services	105,692	17,899	87,775	105,674	18	99.98%	98,495	93,804
2310 Board of Education Services	138,309	107,218	21,889	129,107	9,202	93.35%	89,530	117,101
2320 Executive Administration/Superintendent	436,314	135,113	301,201	436,314	0	100.00%	372,957	371,996
2410 Office of the Principal Services	1,171,944	372,471	774,472	1,146,944	25,000		1,031,550	1,087,135
2520 Fiscal Services	340,588	191,960	148,628	340,588	(0)	100.00%	324,891	329,717
2540 Operation & Maintenance of Plant Services	2,063,743	737,662	1,114,606	1,852,268	211,475	89.75%	1,731,463	1,929,145
2550 Student Transportation Services	875,000	225,214	649,786	875,000	(0)	100.00%	863,393	850,393
2573 Internal Services	0	-	0	0	0	10.00%	0	0
2640 Staff Services/Human Resources	231,127	86,464	124,633	211,097	20,030	91.33%	207,766	217,191
2660 Technology Services	336,320	142,580	181,740	324,320	12,000	96.43%	327,411	339,525
2700 Supplemental Retirement Program	-	-	-	-	-	#DIV/0!	0	0
Total Support Services	6,390,790	2,129,623	3,900,948	6,030,571	360,219	94.36%	5,657,751	5,962,203
Other Requirements								
5200 Transfers to Other Funds	585,033	585,033	-	585,033	-	100.00%	911,557	1,002,147
5300 Apportionments	0	-	-	-	0	0.00%	0	0
6000 Contingency	2,000,000	-	2,000,000	2,000,000	-	100.00%	-	1,459,966
7000 Unappropriated Ending Fund Balance	0	-	0	0	0	10.00%	0	0
Total Other Requirements	2,585,033	585,033	2,000,000	2,585,033	0	100.00%	911,557	2,462,113
Total Requirements	\$ 18,113,697	\$ 4,258,791	\$ 12,851,675	\$ 17,110,465	\$ 1,003,232	94.45%	\$ 14,161,627	\$ 16,940,318

Yamhill-Carlton
Statement of Revenues/Expenditures Budget Vs. Actual
For the Fiscal Year 2025-2026
As of 10/31/2025

	Adopted 2025-26 Budget	Actual YTD Rev./Exp. 10/31/2025	Encumbered as of 11/1/2025	Total Est. Incl. Encum. as of 11/1/2025	(Over)/Under Budget	Actuals 6/30/2025	2024-25 Budget
REVENUE							
1510 Investment Earnings	\$ -	\$ 425	\$ (425)	\$ -	\$ -	826	\$ -
1610 Food Services	\$ 12,500	\$ 2,840	\$ 9,660	\$ 12,500	\$ -	23,192	\$ 75,000
1620 Investment Earnings							\$ 1,000
1700 Extracurricular	\$ 203,000	\$ 5,575	\$ 197,425	\$ 203,000	\$ -		\$ 203,000
1920 Contributions or Donations	-	-	-	-	-	-	10,062
1990 Miscellaneous Local Revenue	122,500	52,294	70,206	122,500	-	222,276	8,575
1991 Pre School Tuition	-	-	-	-	-	-	-
2199 Other Intermediate Resources	3,000	-	3,000	3,000	-	-	-
2200 Restricted Intermediate Revenue							4,813
3102 Restricted SSF High Cost Disability	250,000						3,000
3200 Restricted State Grant	3,500		250,000	250,000		3,722	11,060
3202 Restricted State Farm to School	1,670,595	38,983	3,500	3,500		2,250	3,500
3299 Restricted State Grants-In-Aid	694,409	29,820	1,631,612	1,670,595		1,873,378	1,927,766
4500 Restricted Federal thru State			664,589	694,409		795,468	304,534
4501 Restricted Federal							228,185
4510 Restricted Federal JPTA							198,035
4511 Restricted Federal Breakfast	30,000					23,268	65,000
4910 Restricted Federal Commodities	260,826	460,333	30,000	30,000		393,957	31,000
5200 Transfers	507,715	-	(199,507)	260,826		532,806	484,547
5400 Beginning Fund Balance			\$ 507,715	507,715			512,938
TOTAL REVENUE	3,758,045	590,270	3,167,775	3,758,045	-	3,871,143	4,072,015

EXPENDITURES							
Instruction							
1111 Elementary	315,702	76,397	239,305	315,702	-	415,778	383,584
1113 Elementary Extracurricular	51,000	3,848	47,152	51,000	(0)	52,595	51,000
1121 Intermediate	230,264	72,534	157,730	230,264	0	185,981	279,970
1122 Intermediate Extracurricular	211,965	995	139,810	140,805	71,160	57,996	211,965
1131 High School Programs	281,074	52,821	87,812	140,633	140,441	195,153	310,606
1132 High School Extracurricular	318,458	29,394	170,693	200,087	118,371	183,376	321,796
1220 Students w/Severe Disabilities	170,012	17,578	79,304	96,881	73,131	323,362	168,645
1250 Students with Disabilities	167,907	36,429	131,478	167,907	0	151,609	213,471
1272 Title I Services	205,373	32,629	168,993	201,622	3,751	209,960	222,046
1260 Early Intervention Services	-	-	0	0	(0)	-	0
1285 Alternative Programs	15,000	116	1,084	1,200	13,800	12,303	10,000
1290 Other Programs	250,000	57,631	192,359	249,990	10	-	0
1400 Summer Programs	28,138	5,167	9,920	15,087	13,051	28,383	52,937
Total Instruction	2,244,893	385,539	1,425,640	1,811,178	433,715	1,816,496	2,226,021

Yamhill-Carlton
Statement of Revenues/Expenditures Budget Vs. Actual
For the Fiscal Year 2025-2026
As of 10/31/2025

	Adopted 2025-26 Budget	Actual YTD Rev./Exp. 10/31/2025	Encumbered as of 11/1/2025	Total Est. Incl. Encum. as of 11/1/2025	(Over)/Under Budget	Actuals 6/30/2025	2024-25 Budget
Support Services							
2110 Attendance & Social Work	-	-	-	-	-	-	0
2115 Attendance & Social Work	-	4,000	-	4,000	(4,000)	4,000	4,000
2120 Guidance Services	291,654	52,900	238,763	291,663	(9)	263,556	258,171
2130 Health Services	-	-	-	-	-	-	0
2150 Health Services	-	-	-	-	-	446	446
2160 Other Student Treatment Services	-	-	-	-	-	-	0
2190 Student Support Services Direction	-	-	-	-	-	-	0
2210 Student Support Services Direction	-	-	-	-	-	-	0
2220 Instructional Support Services	-	-	2,139	2,139	(2,139)	12,479	9,844
2230 EHS	3,227	-	0	0	(0)	0	0
2240 Instructional Support Services	55,772	-	3,227	3,227	-	3,227	3,227
2300 General Administration	-	-	24,537	24,537	31,235	14,437	32,816
2310 Board of Directors	45,237	6,731	0	0	(0)	-	0
2410 School Administration	204,223	66,901	38,506	45,237	-	62,893	84,744
2520 Fiscal Services	125,194	41,214	137,324	204,225	(2)	200,004	185,701
2540 Maintenance Operations	126,684	47,960	83,980	125,194	0	62,576	113,108
2550 Transportation	35	-	37,299	85,260	41,424	269,051	399,773
2600 Technology & Records Management	-	-	472	472	(437)	472	35
2640 Staff Management	65,000	9,113	-	-	-	-	65,000
2700 Supplemental Retirement Programs	73,250	1,050	55,887	65,000	-	29,745	0
3100 Enterprise and Community	522,876	105,704	7,451	8,501	64,749	8,501	73,250
3130 Supplemental Retirement Programs	-	-	348,618	454,332	68,554	460,645	614,681
Total Support Services	1,513,152	335,573	978,202	1,313,776	199,376	1,392,031	1,200
5200 Transits	-	-	-	-	-	0	0
5300 Transfers	-	-	-	-	-	0	0
7000 Unappropriated Ending Fund Balance	-	-	-	-	-	0	0
TOTAL EXPENDITURES	\$ 3,758,045	\$ 721,112	\$ 2,403,842	\$ 3,124,954	\$ 633,091	\$ 3,208,527	\$ 4,072,015

Yamhill-Carlton
Statement of Revenues/Expenditures Budget Vs. Actual
For the Fiscal Year 2025-2026
As of 10/31/2025

	Adopted 2025-26 Budget	Actual YTD Rev./Exp. 10/31/2025	Encumbered as of 11/1/2025	Total Est. Incl. Encum. as of 11/1/2025	(Over)/Under Budget	Actuals 6/30/2025	2024-25 Budget
REVENUE							
1111 Current Year Taxes	\$ 948,450	\$ -	\$ 948,450	\$ 948,450	\$ -	998,290	\$ 916,426
1112 Prior Year Taxes	15,000	14,696	\$ 304	\$ 15,000	\$ -	20,116	22,994
1190 Interest on Property Tax	2,500	2,317	\$ 183	\$ 2,500	\$ -	3,208	4,930
1970 Services Provided to Other Funds	-	-	-	-	\$ -	-	1,169,235
1990 Miscellaneous Revenue	1,539,466	331,570	\$ 1,207,896	\$ 1,539,466	\$ -	1,170,130	18,500
5200 Transfers	124,700	124,700	-	\$ 124,700	\$ -	117,600	117,600
5400 Beginning Fund Balance	758,705	-	\$ 758,705	\$ 758,705	\$ -	928,991	922,752
TOTAL REVENUE	3,388,821	473,283	2,915,538	3,388,821	-	3,238,335	3,172,437
EXPENDITURES							
5110 Principal/Interest	3,388,821	290,773	3,098,048	3,388,821	-	2,410,006	3,172,437
5200 Transits	-	-	-	-	-	-	-
5300 Transfers	-	-	-	-	-	-	-
7000 Unappropriated Ending Fund Balance	-	-	-	-	-	-	-
TOTAL EXPENDITURES	3,388,821	290,773	3,098,048	3,388,821	\$ -	\$ 2,410,006	\$ 3,172,437

Yamhill-Carlton SD
Statement of Revenues/Expenditures Budget Vs. Actual
For the Fiscal Year 2025-2026
As of 10/31/2025

Source	Adopted 2025-26 Budget	Actual YTD Rev./Exp. 10/31/2025	Encumbered as of 11/1/2025	Total Est. Incl. Encum. as of 11/1/2025	(Over)/Under Budget	Actuals 6/30/2025	2024-25 Budget
REVENUE							
1130 Construction Excise Tax Revenue	\$ 150,000	\$ 51,068	\$ 98,933	\$ 150,000	\$ -	\$ 210,075	\$ 100,000
1510 Investment Earnings	-	-	-	-	-	-	-
1990 Miscellaneous Local Revenue	19,992	3,313	\$ 16,679	19,992	-	18,983	19,600
5200 Transfers from Other Funds	-	-	-	-	-	400,000	-
5400 Beginning Fund Balance	1,739,000	-	\$ 1,739,000	1,739,000	-	1,254,844	703,800
TOTAL REVENUE	1,908,992	54,381	1,854,611	1,908,992	-	1,883,903	823,400
EXPENDITURES							
Facility Acquisition and Construction							
2540 Building Acquisition	914,000	34,500	879,500	914,000	-	26,651	385,000
4150 Building Construction/Improvement	994,992	-	994,992	994,992	-	8,756	438,400
Total Facility Acquisition	1,908,992	34,500	1,874,492	1,908,992	-	35,407	823,400
6100 Contingency	-	-	-	-	-	0	0
7000 Unappropriated Ending Fund Balance	-	-	-	-	-	0	0
TOTAL EXPENDITURES	\$ 1,908,992	\$ 34,500	\$ 1,874,492	\$ 1,908,992	\$ -	\$ 35,407	\$ 823,400

Yamhill-Carlton SD
Statement of Revenues/Expenditures Budget Vs. Actual
For the Fiscal Year 2025-2026
As of 10/31/2025

Source	Adopted 2025-26 Budget	Actual YTD Rev./Exp. 10/31/2025	Encumbered as of 11/1/2025	Total Est. Incl. Encum. as of 11/1/2025	(Over)/Under Budget	Actuals 6/30/2025	2024-25 Budget
REVENUE							
1510 Investment Earnings	2,400	\$ -	\$ 2,400	\$ 2,400	\$ -	\$ -	\$ 2,400
1920 Contributions or Donations	6,500	-	6,500	6,500	-	-	6,500
1990 Miscellaneous Local Revenue	-	-	-	-	-	-	-
5200 Transfers from Other Funds	-	-	-	-	-	-	-
5400 Beginning Fund Balance	55,000	-	55,000	55,000	-	55,362	55,000
TOTAL REVENUE	63,900	-	63,900	63,900	-	55,362	63,900
EXPENDITURES							
Instruction							
1300 Tuition	8,000	-	8,000	8,000	-	2,000	8,000
Total Instruction	8,000	-	8,000	8,000	-	2,000	8,000
5200 Transits	-	-	-	-	-	0	0
5300 Transfers	-	-	-	-	-	0	0
6000 Unforeseen Expenditures	-	-	-	-	-	0	0
7000 Unappropriated Ending Fund Balance	55,900	-	55,900	55,900	-	-	55,900
TOTAL EXPENDITURES	63,900	\$ -	\$ 63,900	\$ 63,900	\$ -	\$ 2,000	\$ 63,900

Yamhill-Carlton SD
Statement of Expenditures Budget Vs. Actual
For the Fiscal Year 2025-2026
As of 10/31/2025

Expenditure by Object	Adopted 2025-26 Budget	Actual YTD Exp. 10/31/2025	Projected 11/1/2025 Thru 6/30/2025	Total Estimated 2025-26	(Over)/ Under Budget	% Committed	Total Actuals 6/30/2025	2024-25 Budget
100 General Fund								
01 Salaries	\$ 7,631,319	\$ 1,579,109	5,660,846	\$ 7,239,956	\$ 391,363	94.87%	\$ 6,564,617	\$ 6,985,784
02 Associated Payroll Cost	4,046,906	790,143	2,832,043	3,622,185	424,721	89.51%	\$ 3,242,133	\$ 3,622,291
03 Purchased Services	2,800,503	653,518	1,907,243	2,560,761	239,742	91.44%	\$ 2,549,267	\$ 2,787,933
04 Supplies	496,625	294,584	88,520	383,104	113,521	77.14%	\$ 494,429	\$ 640,938
05 Capital Outlay	148,722	8,659	23,737	32,396	116,326	21.78%	\$ 18,749	\$ 86,072
06 Other Objects	404,589	347,745	56,855	404,600	(11)	100.00%	\$ 382,085	\$ 355,188
07 Transfers	585,033	585,033	-	585,033	-	100.00%	\$ 911,557	\$ 1,002,147
08 Other Uses of Funds (Reserves)	2,000,000	-	2,000,000	2,000,000	-	100.00%	-	1,459,966
Total 100 General Fund	18,113,697	4,258,791	12,569,244	16,828,035	1,285,662	92.90%	14,162,838	16,940,318
200 Special Revenue Funds								
01 Salaries	1,297,329	242,500	1,054,789	1,297,288	41	100.00%	\$ 1,296,341	\$ 1,186,725
02 Associated Payroll Cost	880,563	165,314	592,275	757,588	122,975	86.03%	\$ 685,499	\$ 796,772
03 Purchased Services	282,647	17,258	212,195	229,454	53,193	81.18%	\$ 275,977	\$ 339,956
04 Supplies	1,155,563	246,287	342,550	588,837	566,726	50.96%	\$ 698,082	\$ 1,369,951
05 Capital Outlay	91,649	47,960	4,324	52,285	39,364	57.05%	\$ 179,533	\$ 314,699
06 Other Objects	58,694	1,793	57,117	58,910	(216)	100.37%	\$ 73,096	\$ 63,913
07 Transfers	0	0	0	0	(0)	100.00%	\$ 0	\$ 0
08 Other Uses of Funds (Reserves)	0	0	0	0	(0)	100.00%	0	0
Total 200 General Funds	3,766,445	721,112	2,263,250	2,984,362	782,083	79.24%	3,208,528	4,072,016
300 Debt Services Funds								
06 Other Objects	\$ 2,508,186	\$ 290,773	2,217,413	2,508,186	-	0.00%	\$ 2,410,006	\$ 2,411,206
08 Other Uses of Funds (Reserves)	880,635	-	-	-	880,635	0.00%	-	761,231
Total 300 Debt Services Funds	3,388,821	290,773	2,217,413	2,508,186	880,635	74.01%	2,410,006	3,172,437
400 Capital Projects Funds								
03 Purchased Services	\$ -	\$ 34,500	-	34,500	(34,500)	0.00%	\$ 1,893	\$ 1
05 Capital Outlay	\$ 1,898,992	-	1,898,992	1,898,992	-	0.00%	\$ 25,000	\$ 813,400
06 Other Objects	10,000	-	10,000	10,000	-	0.00%	8,515	10,000
Total 400 Capital Projects Funds	1,908,992	34,500	1,908,992	1,943,492	(34,500)	101.81%	35,407	823,401
700 Trust Funds								
03 Purchased Services	\$ 8,000	-	8,000	8,000	-	0.00%	\$ 2,000	\$ 8,000
08 Other Uses of Funds (Reserves)	55,900	-	-	-	55,900	0.00%	-	55,900
Total 700 Trust Funds	63,900	-	8,000	8,000	55,900	12.52%	2,000	63,900
Total Requirements	\$ 27,241,855	\$ 5,305,176	\$ 18,966,899	\$ 24,272,075	\$ 2,969,780	\$ 4	\$ 19,818,779	\$ 25,072,072

Yamhill-Carlton SD
BALANCE SHEET ALL ACCOUNTS
October 31, 2025

ASSETS

Cash in Bank (AP) - Checking	378,279	
Cash in the Bank (Student Body) - Checking	496,326	***
Petty Cash - Café	50	
Cash w/Fiscal Agents	589,287	
Cafeteria Account	3,503	
Investments LGIP	6,029,258	
Taxes Receivable	219,968	
Account Receivable - GASB	4,950	
Interfund Accounts Receivable	-	
Intergovernmental A/R Prior Year	1,125	
Intergovernmental Accounts Receivable	-	
Inventories for Nutrition Services	11,288	
Prepaid Expenses	33,935	
ASB Fund Balance	(251,928)	**
Total Current Assets	\$ 7,516,041	

LIABILITIES AND NET EQUITY

Liabilities:		
Accounts Payable	2,693	
Salaries Payable	-	
Payroll Federal Deductions Payable	-	
Payroll State Deductions Payable	933	
FICA / Medicare Withholding	-	
PERS Payable	(41,377)	
Payroll Volunteer Deduction Payable	1,215	
Payroll Direct Deposit Payable	-	
Employer Paid Benefit	(134,245)	
W/C Liberty NW	16,750	
W/C OR Assessment	(450)	
Deferred Property Tax Revenues	(235,985)	
Payroll Flex Plan Payable	-	
Deposit Payable	-	
Total Liabilities	\$ (390,465)	
Total Assets - Liabilities	\$ 7,125,576	
Net Equity	\$ 7,125,576	*
Rounded	Variance	-

* Financials without Audit Adjustments

Note: The totals tie out correctly, and negative balances represent timing or accrual adjustments that will resolve with the final audit.

Yamhill-Carlton SD
For the Fiscal Year 2025-2026
As of 10/31/2025

Appropriations		Adopted Budget	Working Budget	YTD	Encumbrance	YTD + Enc	Adopted Budget less YTD + Enc
General Fund	100						
Instruction	1000	9,137,874	9,137,874	1,544,135.01	6,427,728.98	7,971,863.99	1,166,010.01
Support Services	2000	6,390,790	6,390,790	2,129,622.54	3,800,626.17	5,930,248.71	460,541.29
	4000	-	-	-	-	-	-
Transfers	5200	585,033	585,033	585,033.00	-	585,033.00	-
		16,113,697	16,113,697	4,258,790.55	10,228,355.15	14,487,145.70	1,626,551.30
Apportionments	5300	-	-	-	-	-	-
Contingency	6000	2,000,000	2,000,000	-	-	-	2,000,000.00
		18,113,697	18,113,697	4,258,790.55	10,228,355.15	14,487,145.70	3,626,551.30
	7000	-	-	-	-	-	-
General Fund		18,113,697	18,113,697	4,258,791	10,228,355	14,487,146	3,626,551
Restricted Revenue Func	200						
Instruction	1000	2,244,893	2,244,893	385,538.66	907,090.04	1,292,628.70	952,264.30
Support Services	2000	990,276	998,676	229,869.24	430,652.06	660,521.30	329,754.70
Community Services	3000	522,876	522,876	105,704.23	348,617.50	454,321.73	68,554.27
Transfers	5200	-	-	-	-	-	-
		3,758,045	3,766,445	721,112.13	1,686,359.60	2,407,471.73	1,350,573.27
Apportionments	5300	-	-	-	-	-	-
Contingency	6000	-	-	-	-	-	-
		3,758,045	3,766,445	721,112.13	1,686,359.60	2,407,471.73	1,350,573.27
	7000	-	-	-	-	-	-
Restricted Revenue Fund		3,758,045	3,766,445	721,112	1,686,360	2,407,472	1,350,573
Debt Services Fund	400						
Debt Services	5100	3,388,821	3,388,821	290,772.91	2,040,153.00	2,330,925.91	1,057,895.09
		3,388,821	3,388,821	290,772.91	2,040,153.00	2,330,925.91	1,057,895.09
Apportionments	5300	-	-	-	-	-	-
Contingency	6000	-	-	-	-	-	-
		3,388,821	3,388,821	290,772.91	2,040,153.00	2,330,925.91	1,057,895.09
	7000	-	-	-	-	-	-
Debt Services Fund		3,388,821	3,388,821	290,773	2,040,153	2,330,926	1,057,895
Capital Projects Fund	400						
Instruction	1000	-	-	-	-	-	-
Support Services	2000	914,000	914,000	34,500.00	-	34,500.00	879,500.00
Facilities Acquisitions	4000	994,992	994,992	-	-	-	994,992.00
Transfers	5200	-	-	-	-	-	-
		1,908,992	1,908,992	34,500.00	-	34,500.00	1,874,492.00
Apportionments	5300	-	-	-	-	-	-
Contingency	6000	-	-	-	-	-	-
		1,908,992	1,908,992	34,500.00	-	34,500.00	1,874,492.00
	7000	-	-	-	-	-	-
Capital Projects Fund		1,908,992	1,908,992	34,500	-	34,500	1,874,492
Trust and Agency Funds	700						
Instruction	1000	8,000	8,000	-	-	-	8,000.00
Transfers	5200	-	-	-	-	-	-
		8,000	8,000	-	-	-	8,000.00
Apportionments	5300	-	-	-	-	-	-
Contingency	6000	-	-	-	-	-	-
		8,000	8,000	-	-	-	8,000.00
	7000	55,900	55,900	-	-	-	55,900.00
Trust and Agency Funds		63,900	63,900	-	-	-	63,900
All Funds							
Instruction	1000	11,390,767	11,390,767	1,929,673.67	7,334,819.02	9,264,492.69	2,126,274.31
Support Services	2000	8,295,066	8,303,466	2,393,992	4,231,278	6,625,270.01	1,669,795.99
Community Services	3000	522,876	522,876	105,704.23	348,617.50	454,321.73	68,554.27
Facilities Acquisitions	4000	994,992	994,992	-	-	-	994,992.00
Debt Services	5100	3,388,821	3,388,821	290,772.91	2,040,153.00	2,330,925.91	1,057,895.09
Transfers	5200	585,033	585,033	585,033.00	-	585,033.00	-
		25,177,555	25,185,955	5,305,175.59	13,954,867.75	19,260,043.34	5,917,511.66
Apportionments	5300	-	-	-	-	-	-
Contingency	6000	2,000,000	2,000,000	-	-	-	2,000,000.00
		27,177,555	27,185,955	5,305,175.59	13,954,867.75	19,260,043.34	7,917,511.66
Unappropriated & Reser	7000	55,900	55,900	-	-	-	55,900.00
All Funds		27,233,455	27,241,855	5,305,175.59	13,954,867.75	19,260,043.34	7,973,411.66

Yamhill-Carlton School District No. 1

Reprint Check Listing

Fiscal Year: 2025-2026

Criteria:

Bank Account: COLUMBIA BANK 2403

From Check: To Check:

From Date: 10/01/2025

To Date: 10/31/2025

From Voucher:

To Voucher:

To Clear Date:

Types: ☒ Expense ☒ Manual ☐ Payroll ☐ Payroll Deductions ☒ Other Disbursements

* Indicates gap in check sequence

Check Number	Date	Payee	Amount	Voucher	Status	Type	Cleared?	Clear Date	Void Date
62506	10/03/2025	CHILDREN'S HEALTH MARKET, THE	\$32,555.52	1103	Printed	Expense	☐		
62507	10/03/2025	COSA	\$300.00	1103	Printed	Expense	☒	10/31/2025	
62508	10/03/2025	DAVISON AUTO PARTS	\$82.09	1103	Printed	Expense	☒	10/31/2025	
62509	10/03/2025	FLASHALERT NEWSWIRE	\$291.80	1103	Printed	Expense	☒	10/31/2025	
62510	10/03/2025	GOODHEART-WILCOX PUBLISHER	\$32,329.35	1103	Printed	Expense	☒	10/31/2025	
62511	10/03/2025	HOUGHTON MIFFLIN HARCOURT	\$220.05	1103	Printed	Expense	☒	10/31/2025	
62512	10/03/2025	InTouch Receipting	\$8,525.00	1103	Printed	Expense	☒	10/31/2025	
62513	10/03/2025	LOWE'S COMPANIES INC.	\$133.84	1103	Printed	Expense	☒	10/31/2025	
62514	10/03/2025	MARLIN BRETHOWER	\$547.20	1103	Printed	Expense	☒	10/31/2025	
62515	10/03/2025	OREGON EQUIPMENT SALES LLC	\$72.96	1103	Printed	Expense	☒	10/31/2025	
62516	10/03/2025	RODDA PAINT CO	\$136.84	1103	Printed	Expense	☒	10/31/2025	
62517	10/03/2025	UNITED RENTALS (NORTH AMERICA) INC	\$198.90	1103	Printed	Expense	☒	10/31/2025	
62518	10/03/2025	WILLAMETTE HVAC	\$1,217.25	1103	Printed	Expense	☒	10/31/2025	
62519	10/03/2025	YAMHILL COUNTY HEALTH & HUMAN SERVICES	\$12,005.40	1103	Printed	Expense	☒	10/31/2025	
62520	10/03/2025	PHENOM FLOORING LLC	\$13,655.00	1105	Printed	Expense	☒	10/31/2025	
62521	10/06/2025	PETTY CASH - YAMHILL HIGH SCHOOL	\$50.00	1106	Printed	Expense	☒	10/31/2025	
62522	10/06/2025	Petty Cash- YCIS	\$200.00	1107	Printed	Expense	☒	10/31/2025	
* 62524	10/14/2025	AGParts Worldwide, Inc.	\$598.00	1116	Printed	Expense	☒	10/31/2025	
62525	10/14/2025	BSN SPORTS LLC	\$263.19	1116	Printed	Expense	☒	10/31/2025	
62526	10/14/2025	CITY OF CARLTON	\$4,877.66	1116	Printed	Expense	☒	10/31/2025	
62527	10/14/2025	CITY OF YAMHILL	\$18,022.42	1116	Printed	Expense	☒	10/31/2025	
62528	10/14/2025	E. L. ACHIEVE, INC.	\$2,640.00	1116	Printed	Expense	☒	10/31/2025	

Yamhill-Carlton School District No. 1

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Types: ☒ Expense ☒ Manual ☐ Payroll ☐ Payroll Deductions ☒ Other Disbursements

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Check Number	Date	Payee	Amount	Voucher	Status	Type	Cleared?	Clear Date	Void Date
62529	10/14/2025	ESTES INDUSTRIES, LLC	\$99.99	1116	Printed	Expense	☒	10/31/2025	
62530	10/14/2025	IRON MOUNTAIN INCORPORATED	\$422.56	1116	Printed	Expense	☒	10/31/2025	
62531	10/14/2025	LAWRENCE COMPANY	\$100.00	1116	Printed	Expense	☒	10/31/2025	
62532	10/14/2025	LES SCHWAB TIRE CENTER	\$931.84	1116	Printed	Expense	☒	10/31/2025	
62533	10/14/2025	LOWE'S COMPANIES INC.	\$294.62	1116	Printed	Expense	☒	10/31/2025	
62534	10/14/2025	OACA	\$75.00	1116	Printed	Expense	☒	10/31/2025	
62535	10/14/2025	OADA	\$140.00	1116	Printed	Expense	☐		
62536	10/14/2025	OREGON EQUIPMENT SALES LLC	\$0.36	1116	Printed	Expense	☒	10/31/2025	
62537	10/14/2025	RECOLOGY WESTERN OREGON GARBAGE	\$1,584.27	1116	Printed	Expense	☒	10/31/2025	
62538	10/14/2025	SALEM FOOTBALL OFFICIALS	\$1,486.00	1116	Printed	Expense	☐		
62539	10/14/2025	SCHOOL LIFE	\$589.42	1116	Printed	Expense	☒	10/31/2025	
62540	10/14/2025	SWINGSETMALL.COM	\$110.10	1116	Printed	Expense	☒	10/31/2025	
62541	10/14/2025	VISIBLE BODY	\$862.50	1116	Printed	Expense	☐		
* 62544	10/17/2025	Comercial Bank Lockbox-PTSolutions	\$80.10	1128	Printed	Expense	☒	10/31/2025	
62545	10/17/2025	LOWE'S COMPANIES INC.	\$37.96	1128	Printed	Expense	☒	10/31/2025	
62546	10/17/2025	MCMINNVILLE GAS INC.	\$10,597.99	1128	Printed	Expense	☒	10/31/2025	
62547	10/17/2025	OREGON LIBRARY ASSOCIATION	\$85.00	1128	Printed	Expense	☒	10/31/2025	
62548	10/17/2025	PORTLAND GENERAL ELECTRIC	\$16,561.29	1128	Printed	Expense	☒	10/31/2025	
62549	10/17/2025	SALEM GARAGE DOOR	\$450.00	1128	Printed	Expense	☒	10/31/2025	
62550	10/17/2025	SNO SITES	\$500.00	1128	Printed	Expense	☒	10/31/2025	
62551	10/17/2025	SYSCO FOOD SERVICES	\$8,485.90	1128	Printed	Expense	☒	10/31/2025	
62552	10/17/2025	ZIPLY FIBER	\$3,491.43	1128	Printed	Expense	☒	10/31/2025	

Yamhill-Carlton School District No. 1

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Check Number	Date	Payee	Amount	Voucher	Status	Type	Cleared?	Clear Date	Void Date
* 62554	10/24/2025	Advanced Commerical Communications, LLC	\$3,582.95	1133	Printed	Expense	☐		
62555	10/24/2025	ARMOR ZONE ATHLETICS LLC	\$4,860.00	1133	Printed	Expense	☐		
62556	10/24/2025	BROCKMAN PAINTING	\$2,000.00	1133	Printed	Expense	☒	10/31/2025	
62557	10/24/2025	CLACKAMAS ESD	\$1,274.67	1133	Printed	Expense	☐		
62558	10/24/2025	Clear Trails CPAs, LLC	\$13,600.00	1133	Printed	Expense	☐		
62559	10/24/2025	Collins, Austin Hunter Saunders	\$234.00	1133	Printed	Expense	☐		
62560	10/24/2025	ELMIRA HIGH SCHOOL	\$120.00	1133	Printed	Expense	☐		
62561	10/24/2025	Joshua Ellis	\$349.31	1133	Printed	Expense	☐		
62562	10/24/2025	KAPCO-KENT ADHESIVE PRODUCTS	\$285.62	1133	Printed	Expense	☐		
62563	10/24/2025	KATHERINE BONNER	\$155.47	1133	Printed	Expense	☐		
62564	10/24/2025	LEARNING WITHOUT TEARS	\$110.00	1133	Printed	Expense	☐		
62565	10/24/2025	LES SCHWAB TIRE CENTER	\$35.98	1133	Printed	Expense	☐		
62566	10/24/2025	MCMINNVILLE GAS INC.	\$1,038.63	1133	Printed	Expense	☐		
62567	10/24/2025	MIAPLAZA, INC.	\$400.00	1133	Printed	Expense	☐		
62568	10/24/2025	MICHELLE MATSON	\$181.25	1133	Printed	Expense	☐		
62569	10/24/2025	MOLLY PEASE	\$265.00	1133	Printed	Expense	☐		
62570	10/24/2025	NICOLE OGLE	\$280.00	1133	Printed	Expense	☐		
62571	10/24/2025	OREGON WRESTLING CLASSIC	\$500.00	1133	Printed	Expense	☐		
62572	10/24/2025	PARKER BALDWIN	\$1,438.68	1133	Printed	Expense	☐		
62573	10/24/2025	Peter Casasanto	\$550.00	1133	Printed	Expense	☐		
62574	10/24/2025	RAINBOW RESOURCE CENTER, INC	\$1,691.04	1133	Printed	Expense	☐		
62575	10/24/2025	RAINIER SCHOOL DISTRICT	\$400.00	1133	Printed	Expense	☐		

Yamhill-Carlton School District No. 1

Reprint Check Listing

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* Indicates gap in check sequence

Check Number	Date	Payee	Amount	Voucher	Status	Type	Cleared?	Clear Date	Void Date
62576	10/24/2025	REBEKAH D SMITS	\$210.00	1133	Printed	Expense	☐		
62577	10/24/2025	ROBERTS, CASSANDRA	\$189.95	1133	Printed	Expense	☐		
62578	10/24/2025	SALEM FOOTBALL OFFICIALS	\$1,865.99	1133	Printed	Expense	☒	10/31/2025	
62579	10/24/2025	SHAYANNA RAYNE SACKETT	\$425.00	1133	Printed	Expense	☐		
62580	10/24/2025	STEPHANI DEL RIO	\$760.00	1133	Printed	Expense	☐		
62581	10/24/2025	STRUCTURED COMMUNICATIONS SYSTEMS INC	\$8,659.44	1133	Printed	Expense	☐		
62582	10/24/2025	SYSCO FOOD SERVICES	\$11,345.53	1133	Printed	Expense	☐		
62583	10/24/2025	T AND E GENERAL STORE	\$10.00	1133	Printed	Expense	☐		
62584	10/24/2025	UNITED RENTALS (NORTH AMERICA) INC	\$198.90	1133	Printed	Expense	☐		
62585	10/24/2025	WADDELL ELECTRIC	\$1,902.14	1133	Printed	Expense	☐		
62586	10/24/2025	WARDS NATURAL SCIENCE	\$781.06	1133	Printed	Expense	☐		
62587	10/24/2025	WILLAMETTE HVAC	\$7,572.79	1133	Printed	Expense	☐		
* 62589	10/31/2025	Civics Learning Project	\$300.00	1147	Printed	Expense	☐		
62590	10/31/2025	COASTAL RANGE LEAGUE	\$2,000.00	1147	Printed	Expense	☐		
62591	10/31/2025	LINFIELD UNIVERSITY	\$218.00	1147	Printed	Expense	☐		
62592	10/31/2025	LOWE'S COMPANIES INC.	\$120.93	1147	Printed	Expense	☐		
62593	10/31/2025	MARLIN BRETHOWER	\$416.00	1147	Printed	Expense	☐		
62594	10/31/2025	OFFICE DEPOT, INC	\$120.39	1147	Printed	Expense	☐		
62595	10/31/2025	OSAA	\$4,200.00	1147	Printed	Expense	☐		
62596	10/31/2025	SAFEGUARD FIRE EXTINGUISHER	\$824.15	1147	Printed	Expense	☐		
62597	10/31/2025	SALEM GARAGE DOOR	\$1,797.64	1147	Printed	Expense	☐		
62598	10/31/2025	SIMPLOT AB RETAIL INC	\$1,200.00	1147	Printed	Expense	☐		

Yamhill-Carlton School District No. 1

Reprint Check Listing

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From Date: 10/01/2025 To Date: 10/31/2025

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* Indicates gap in check sequence

Check Number	Date	Payee	Amount	Voucher	Status	Type	Cleared?	Clear Date	Void Date
62599	10/31/2025	SYSCO FOOD SERVICES	\$3,218.41	1147	Printed	Expense	☐		
62600	10/31/2025	VORTEX DOORS, LLC	\$1,900.80	1147	Printed	Expense	☐		
62601	10/31/2025	Wennerstrom, Amber	\$353.36	1147	Printed	Expense	☐		
62602	10/31/2025	YAMHILL COUNTY HEALTH & HUMAN SERVICES	\$12,005.40	1147	Printed	Expense	☐		
Total Amount:			\$271,857.28						

Yamhill-Carlton School District No. 1

Reprint Check Listing

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From Clear Date:

Types: ☒ Expense ☒ Manual ☐ Payroll ☐ Payroll Deductions ☒ Other Disbursements

Other Disbursements

Date	BankName	Account	Amount	Memo	Clear Date
10/16/2025	COLUMBIA BANK	2403	5,086.38	Direct Voucher Posting	10/31/2025
10/24/2025	COLUMBIA BANK	2403	(205,672.91)	LGIP 4556 to Cking 2403 Conf 4310504	10/31/2025
10/27/2025	COLUMBIA BANK	2403	41,214.19	Direct Voucher Posting	10/31/2025
10/27/2025	COLUMBIA BANK	2403	1,062.59	Direct Voucher Posting	10/31/2025
10/31/2025	COLUMBIA BANK	2403	1,773.45	Direct Voucher Posting	10/31/2025
10/31/2025	COLUMBIA BANK	2403	516.64	Direct Voucher Posting	10/31/2025
10/15/2025	COLUMBIA BANK	2403	637.30	Direct Voucher Posting	10/31/2025
10/27/2025	COLUMBIA BANK	2403	40,515.94	Direct Voucher Posting	10/31/2025
10/29/2025	COLUMBIA BANK	2403	1,797.13	Direct Voucher Posting	10/31/2025
10/28/2025	COLUMBIA BANK	2403	1,191.66	Direct Voucher Posting	10/31/2025
10/29/2025	COLUMBIA BANK	2403	141,162.08	Direct Voucher Posting	10/31/2025
10/17/2025	COLUMBIA BANK	2403	18,005.27	Direct Voucher Posting	10/31/2025
10/29/2025	COLUMBIA BANK	2403	728.22	Direct Voucher Posting	10/31/2025
10/31/2025	COLUMBIA BANK	2403	7,526.08	Direct Voucher Posting	10/31/2025
10/31/2025	COLUMBIA BANK	2403	6,471.55	Direct Voucher Posting	10/31/2025
10/14/2025	COLUMBIA BANK	2403	33,042.52	Direct Voucher Posting	10/31/2025
10/6/2025	COLUMBIA BANK	2403	(250,550.00)	LGIP 4556 to Cking 2403 Conf 4297253	10/31/2025
10/27/2025	COLUMBIA BANK	2403	12.14	Direct Voucher Posting	10/31/2025
10/10/2025	COLUMBIA BANK	2403	278.78	Direct Voucher Posting	10/31/2025
10/10/2025	COLUMBIA BANK	2403	91.57	Direct Voucher Posting	10/31/2025

Yamhill-Carlton School District No. 1

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Date	BankName	Account	Amount	Memo	Clear Date
10/13/2025	COLUMBIA BANK	2403	(980,000.00)	LGIP 4556 to Cking 2403 Conf 4302553	10/31/2025
10/3/2025	COLUMBIA BANK	2403	1,585.50	Direct Voucher Posting	10/31/2025
10/3/2025	COLUMBIA BANK	2403	18,892.96	Direct Voucher Posting	10/31/2025
10/16/2025	COLUMBIA BANK	2403	1,191.66	Direct Voucher Posting	10/31/2025
10/9/2025	COLUMBIA BANK	2403	146,730.83	Direct Voucher Posting	10/31/2025
10/16/2025	COLUMBIA BANK	2403	160,264.95	Direct Voucher Posting	10/31/2025
10/16/2025	COLUMBIA BANK	2403	45,167.40	Direct Voucher Posting	10/31/2025
10/14/2025	COLUMBIA BANK	2403	4,340.64	Direct Voucher Posting	10/31/2025
10/15/2025	COLUMBIA BANK	2403	8,706.63	Direct Voucher Posting	10/31/2025
10/15/2025	COLUMBIA BANK	2403	522,230.98	Direct Voucher Posting	10/31/2025
10/14/2025	COLUMBIA BANK	2403	6,091.57	Direct Voucher Posting	10/31/2025
10/15/2025	COLUMBIA BANK	2403	98.94	Direct Voucher Posting	10/31/2025

Other Disbursement Total:

(219,807.36)

Report Total Amount: \$52,049.92

End of Report



SUPERINTENDENT EVALUATION WORKBOOK

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**OREGON SCHOOL
BOARDS ASSOCIATION**

1201 Court St NE, Ste 400 | Salem, OR 97301
503-588-2800 or 800-578-6722
www.osba.org | info@osba.org



**COALITION OF OREGON
SCHOOL ADMINISTRATORS**

707 13th St SE, Suite 100 | Salem, OR 97301
503-581-3141
www.cosa.k12.or.us

rev 6/2020

June 1, 2020

Dear Oregon School Boards and Superintendents,

The research is clear — a healthy and productive relationship between a school board and its superintendent is essential to the sustained success of any school district or ESD. Simply put, when superintendents and school boards work effectively together, especially over the long term, their schools and students do better.

The role of the superintendent is critical — and together with support provided by the school board through constructive direction, guidance and evaluation of the superintendent, sets the foundation and ensures success. The evaluation of the superintendent is the responsibility of the school board. This OSBA and COSA endorsed process is intended to guide the evaluation process between the school board and their superintendent with a collaborative approach that is designed to continuously improve not only the performance of the superintendent, but also the system they lead. The evaluation of the superintendent, if done well, should provide useful feedback to the superintendent, as well as clear accountability for the superintendent and the school board.

In the 2019-20 school year, OSBA and COSA partnered to produce this co-endorsed superintendent evaluation process. The purpose of this endeavor was to bring clarity and consistency to school boards' performance expectations of superintendents and to provide guidance to boards and superintendents for an effective evaluation process based on evidence-based practices and continuous improvement. The process for developing this handbook included many opportunities for superintendents and school board members to provide input.

The responsibility for evaluating the superintendent resides with the school board; however, this process should be done in a collaborative manner. School boards may choose to work with a consultant to assist them in this process. This process should be an iterative cycle that helps guide and focus the key work in Oregon districts and supports the continuous improvement of Oregon superintendents.

Sincerely,

A handwritten signature in black ink, appearing to read 'J. Green', with a long horizontal flourish extending to the right.

Jim Green, OSBA Executive Director

A handwritten signature in black ink, appearing to read 'C. Hawkins', with a long horizontal flourish extending to the right.

Craig Hawkins, COSA Executive Director

SUPERINTENDENT EVALUATION OVERVIEW

Selecting the superintendent and evaluating their performance is one of the school board's most important responsibilities.

This workbook is designed to help boards and superintendents navigate the evaluation process together and it is intended to be collaborative and keep the board's role at the forefront.

A HIGH-QUALITY SUPERINTENDENT EVALUATION:

- develops good board/superintendent relationships
- clarifies roles
- identifies superintendent professional development opportunities
- provides a mechanism for public accountability
- provides input and feedback to the superintendent to guide continuous improvement

PERFORMANCE EVALUATIONS ARE MOST EFFECTIVE WHEN THEY ARE DESIGNED AND USED FOR:

- strengthening the board/superintendent relationship
 - reviewing past performance
 - communicating future expectations and goals
 - determining future professional development for the superintendent
 - making ongoing employment decisions (contract extension and compensation)
-

FIVE-PART EVALUATION TOOL

OSBA and COSA have developed a five-part tool for evaluating superintendents.

- **PART 1 SUPERINTENDENT PERFORMANCE STANDARDS. (Appendix A)**
These are based on the Professional Standards for Educational Leaders (PSEL, 2015) and District Level National Educational Leadership Preparation Standards (NELP, 2018) and augmented by standards jointly developed by the Coalition of Oregon School Administrators (COSA) and the Oregon School Boards Association (OSBA).
- **PART 2 SUPERINTENDENT GOALS. (Appendix B)**
This section evaluates progress toward the superintendent's goals established by the board and superintendent at the beginning of the evaluation cycle.
- **PART 3 EVIDENCE OF PERFORMANCE. (Appendix C)**
This consists of the superintendent's self-evaluation and their regular reporting to the board on progress toward standards and goals. This area may be supported by artifacts or documents specifically in those areas where the board may lack direct knowledge.

- **PART 4 FEEDBACK ON PERFORMANCE. (OPTIONAL, Appendix D)**

This consists of a targeted feedback survey (TFS)¹ of the superintendent's performance by selected staff and members of the community that have frequent, consistent interactions with the superintendent.

- **PART 5 EVALUATION SUMMARY. (Appendix E)**

This is the summary of the evaluation the board writes to share its unified message with the superintendent and the public.

School board members typically complete ratings in Parts 1 and 2 individually and should consider information gathered in Parts 3 and 4 (if used) in these ratings. The individual board member ratings are then compiled and summarized into one comprehensive evaluation. Part 5 is a written report given by the board for discussion with the superintendent and placed in the superintendent's personnel file. A summary of the evaluation is shared with the public at the conclusion of the formal evaluation cycle. It is important that the board speak with one voice that represents the consensus of the board.

HOW CAN WE EVALUATE OBJECTIVELY AND FAIRLY?

Objective and fair evaluations take into consideration policy, the superintendent's employment contract, standards, goals, articles of evidence and targeted feedback surveys. At the beginning of each evaluation cycle, the board should review the superintendent's contract and its own policy regarding superintendent evaluation. With that information, the board then determines the criteria, process and timeline so there are no surprises when the formal evaluation occurs. To be fair and objective, boards should only introduce additional criteria during the year in extenuating circumstances and should follow policy CBG for guidance on doing so. **It is the board's responsibility to ensure that policy and contractual timelines are met.**

DOCUMENTATION

The processes outlined in this workbook are more than a checklist. They require the objective consideration of evidence demonstrating the degree to which each standard has been met. This evidence can be through direct interaction and observation of the superintendent's performance or may be obtained through the superintendent's self-evaluation and/or information gained through a targeted feedback survey. Documentation may be provided by the superintendent orally, as written lists, or as specific documents. Some boards and superintendents may select an artifacts of evidence approach¹.

EVALUATION CONFERENCES AND CHECK-INS

Face-to-face conversations between the board and superintendent during the evaluation cycle are essential to an effective process. Regular reports to the board by the superintendent and check-in meetings should occur at least quarterly throughout the year. This provides the superintendent and board an opportunity to be updated on the superintendent's progress toward meeting the goals and performance standards, and to provide feedback on any concerns the board might have. This also allows the superintendent an opportunity to seek further guidance and support from the board, or provide further clarification about the progress needed to meet the targets, and make mid-year corrections on the path to achieving goals and standards. The final evaluation conference is where the board and superintendent meet to discuss the superintendent's performance and an evaluation report is presented.

¹ Described later in this workbook

SUPERINTENDENT EVALUATION AT A GLANCE

Time to start
thinking about
next year!



MARCH THROUGH AUGUST | PRE-EVALUATION

In collaboration with the superintendent, adopt all standards, goals and evaluation procedures. This includes adopting materials for Parts 1 and 2, and adopting a schedule for Parts 3 and 4 (if used).

AUGUST THROUGH MARCH* | CHECK-IN MEETINGS

Check-in meetings occur at least quarterly. These check-ins give the superintendent the opportunity to provide information related to goals and standards, and for the board to ask questions about progress and provide additional guidance and support. This also includes a final check-in in which the superintendent can present their self-evaluation. These meetings are generally conducted in executive session. This correlates to Part 3.

JANUARY THROUGH MARCH* | GATHER INFORMATION

The superintendent's self-evaluation is presented to the board. Board members rate the superintendent on Parts 1 and 2 individually, and then compile ratings and comments into a summary document. If a targeted feedback survey is used, the survey would be conducted in this phase.

MARCH* | EVALUATION RESULTS

By March 15th, or at a date specified in the superintendent's contract, the board meets with the superintendent to review the evaluation results. This meeting is conducted in executive session unless the superintendent requests the meeting be conducted in public. Generally, the board crafts a short narrative statement about the evaluation to be shared at a regular board meeting. This correlates to Part 4.

MARCH* | EVALUATION CONCLUSION

The board adopts the short narrative summary in open session. This corresponds to Part 5.

*Review the superintendent's contract and district policy for any applicable deadlines.

PERFORMANCE RATINGS

PART 1 (In Appendix A) includes eight standards with descriptors. Board members should not rate descriptors but, rather, consider them as a whole in determining the overall rating for that performance standard.

The scoring guide for each standard uses the following four categories:

4 = ACCOMPLISHED | 3 = EFFECTIVE | 2 = DEVELOPING | 1 = INEFFECTIVE

Read each standard's descriptions carefully while considering your rating and select the score that most closely matches your judgment and the evidence provided of the superintendent's work in this area.

PART 2 (In Appendix B) includes any goals that were set for the superintendent during the evaluation cycle. The superintendent's goals should be rated with the same scale. It is highly recommended that the superintendent provides a self-evaluation on their performance in the standards, goals and any other criteria determined for the evaluation cycle. This self-evaluation and any accompanying evidence provided in Part 3 shall be provided to the board prior to conducting their evaluation of the superintendent's performance.

WRITTEN COMMENTS

Written comments from individual members of the board help clarify ratings on standards and goals; however, they are not intended as direct feedback to the superintendent. They may contribute to the board's one-voice message to the superintendent that can help clarify the evaluation feedback.

The written comments may be prepared by a board member or consultant working on behalf of the board. This provides the board with the opportunity to deliver specific constructive criticism and/or accolades and provides the superintendent with useful information for continuous performance improvement. Again, the board should speak with one voice in making written comments on the final evaluation report and summary to the superintendent and the community.

PUBLIC MEETINGS LAW

A governing body such as a school board, ESD board or community college board may hold an executive session to evaluate the job performance of its chief executive officer, so long as the person being reviewed does not request an open session (ORS 192.660(2)(i)). However, the executive session for evaluation does not allow the board to discuss the superintendent's salary, conduct a general evaluation of a district goal or give directives to personnel about district goals (ORS 192.660(8)). The governing body must give advance notice of the performance evaluation to allow the person whose performance will be evaluated to choose whether to conduct the evaluation in open session or executive session.

The Attorney General's Public Records and Meetings Manual states that disclosure of the performance evaluation for the chief executive officer generally is not an unreasonable invasion of privacy, and therefore disclosable to the public even though the actual evaluation was held in executive session. This disclosure is in contrast to the disclosure of a record of discipline about a public officer, which is conditionally exempt from disclosure. OSBA and COSA recommend that a narrative summary of the performance evaluation be presented to the public after the evaluation is complete.

TIMELINE AND ACTION

1. PRE-EVALUATION (March, April or as soon as a new superintendent begins employment)

Before the new evaluation cycle begins, and prior to the completion of the district's budget, the board should review any statutes, recent legislation, policies and the superintendent's contract for any specific criteria regarding evaluation that must be followed by the board. Following that review, the board and superintendent should mutually establish the evaluation timeline, process, and criteria (goals and expectations, and standards). The board and superintendent should meet to develop a clear set of goals for the superintendent that are related to the goals for the organization for the coming year. OSBA and COSA jointly recommend the performance standards provided in this document which are based on national standards for district leaders. In some cycles it is prudent for the board to emphasize and prioritize certain standards based on previous evaluations, the tenure of the superintendent or the strategic priorities of the district.

2. CHECK-IN MEETINGS (July, October and January or quarterly, based upon when a new superintendent begins employment)

The board and the superintendent meet to discuss the superintendent's progress toward meeting the formally-adopted goals, to talk about any specific concerns related to the superintendent's performance, and to offer support to the superintendent. It is recommended that the superintendent, in the January board meeting, provides the self-evaluation (Part 3) for board members to consider when they each complete Parts 1 and 2 of the process.

3. GATHER INFORMATION (By March 15 or date specified in contract)

Compiling results from individual board members can be confusing if there are conflicting perspectives; therefore, it is best done by discussion among all board members sitting together in executive session. Some boards work with a consultant to assist in the evaluation process including facilitating the TFS and compiling individual board member ratings into one unified rating. Since the superintendent works for the board (as a whole, not its individual members), it is critical that board members recognize the importance of coming to a consensus and speaking with one voice in the evaluation. The evaluation should result in areas for celebration, in steps for professional development for the superintendent, and in a plan for informing the community about the results of the evaluation and status of the district's goals.

4. EVALUATION RESULTS (March)

OSBA and COSA recommend that a narrative summary of the performance evaluation be presented to the public after the evaluation is complete. Before the beginning of the next evaluation year, the board and superintendent should meet to begin the next cycle of goal setting and evaluation, which allows the superintendent time to plan for the ensuing year. The goals should be formally adopted by the board and made public to keep the district and community informed.

5. EVALUATION CONCLUSION

In the final year of the superintendent's contract the board must provide notice of renewal or non-renewal by March 15 or a date specified in the contract (ORS 342.513). There may also be renewal provisions in the superintendent's contract, so boards should review the contract for any additional requirements. If you have questions regarding the terms and renewal provisions in the superintendent's contract or are considering nonrenewal, we recommend that you consult with legal counsel. The superintendent evaluation process provides the board with an opportunity to share the school district's progress with the community. A short summary of the board's evaluation of the superintendent should be prepared based on the data and evidence gathered in the evaluation process.

HOW WILL AN INDIVIDUAL FILLING THE DUAL ROLES OF SUPERINTENDENT AND PRINCIPAL BE EVALUATED?

"An individual filling the dual roles of principal and superintendent is a superintendent who has some principal duties, and therefore need only be evaluated as a superintendent. Since the superintendent role supersedes the principal role and superintendents are not included under the evaluation requirements for SB 290, it is up to local school boards to determine how these individuals are evaluated." ([ODE Teacher and Administrator Evaluation and Support Systems Frequently Asked Questions](#), Revised August 2018, Question #8.)

PERTINENT OREGON REVISED STATUTES (ORS) AND OREGON ADMINISTRATIVE RULES (OAR)

ORS 192.660 Executive sessions permitted on certain matters; procedures; news media representatives' attendance; limits.

- (1) ORS 192.610 to 192.690 do not prevent the governing body of a public body from holding executive session during a regular, special or emergency meeting, after the presiding officer has identified the authorization under ORS 192.610 to 192.690 for holding the executive session.
- (2) The governing body of a public body may hold an executive session: ...
 - (i) To review and evaluate the employment-related performance of the chief executive officer of any public body, a public officer, employee or staff member who does not request an open hearing...
- (8) A governing body may not use an executive session for purposes of evaluating a chief executive officer or other officer, employee or staff member to conduct a general evaluation of an agency goal, objective or operation or any directive to personnel concerning agency goals, objectives, operations or programs.

OAR 199-040-0020 Permitted Topics for Executive Session

- (3) Compensation, including salaries and benefits, must not be discussed or negotiated during an executive session under ORS 192.660(2)(a), (b) or (i).

ORS 342.513 Renewal or nonrenewal of contracts for the following year.

- (1) Each district school board shall give written notice of the renewal or nonrenewal of the contract for the following school year by March 15 of each year to all teachers and administrators in its employ who are not contract teachers as defined in ORS 342.815 (Definitions for ORS 342.805 to 342.937). In case the district school board does not renew the contract, the material reason therefore shall, at the request of the teacher or administrator, be included in the records of the school district, and the board shall furnish a statement of the reason for nonrenewal to the teacher or administrator.
- (2) This section is not effective unless teachers or administrators notify the board in writing on or before April 15 of acceptance or rejection of the position for the following school year.

ORS 342.120(1) "Administrator" includes but is not limited to all superintendents, assistant superintendents, principals and academic program directors in public schools or education service districts who have direct responsibility for supervision or evaluation of licensed teachers and who are compensated for their services from public funds.

OREGON SCHOOL BOARDS ASSOCIATION SELECTED SAMPLE POLICY CBG

Adopted:

EVALUATION OF THE SUPERINTENDENT

The board will formally evaluate the superintendent's job performance at least once each year. The evaluation will be based on the administrative job description, any applicable standards of performance, board policy and progress in attaining any goals for the year established by the superintendent and/or the board.

Additional criteria for the evaluation, if any, will be developed at a public board meeting prior to conducting the evaluation. The superintendent will be notified of the additional criteria prior to the evaluation.

The board's discussion and conferences with and about the superintendent and their performance will be conducted in an executive session, unless the superintendent requests a session open to the public. Such an executive session will not include a general evaluation of any district goal, objective or operation. Results of the evaluation will be written and placed in the superintendent's personnel file.

At the board's discretion, it may notify the superintendent in writing of specific areas to be remedied, and the superintendent may be given an opportunity to correct the problem(s). Where the board provided written notice pursuant to the prior sentence, if the board determines the superintendent's performance remains unsatisfactory, the board may dismiss or non-renew the superintendent pursuant to board policy, the superintendent's employment contract and state law and rules. In those situations where the superintendent's employment contract includes an evaluation, dismissal or non-renewal provision, it shall take precedence over this policy.

END OF POLICY

LEGAL REFERENCE(S):

ORS 192.660(2), (8)

ORS 332.107

ORS 332.505

ORS 342.513

ORS 342.815

OAR 581-022-2405

Hanson v. Culver Sch. Dist. (FDAB 1975).

(There are no OSBA-recommended Administrative Regulations (ARs) associated with this policy. If your district has an AR for this policy, we recommend you delete it.)

POST-EVALUATION TASKS

As soon as one evaluation cycle is complete, a new one begins. It is important that the momentum from the previous cycle be maintained and that a new cycle with standards, goals and expectations begins immediately.

Based on the outcomes of the previous year's goals, as well as current and future district initiatives, the superintendent should draft goals for the next evaluation period, which the board should consider, discuss, potentially amend, and then formally adopt. This must be done in open session. These goals should be measurable and should reflect the superintendent's role in the overall vision and/or goals of the district.

The board should ensure that the standards, process, components and timeline that the board adopts are consistent with evaluation language in the superintendent's contract. This should be done prior to adopting the process and tool for the new cycle.

The board should also adopt the standards to measure the superintendent's performance, the timeline of the new evaluation cycle and determine whether a targeted feedback survey will be conducted as part of the evaluation cycle.

A critical element of the evaluation cycle is scheduling designated evaluative check-ins between the board and superintendent, which may take place in executive session if they meet legal criteria. This allows the conversation to occur candidly. These are more than just updates at board meetings; these check-ins are meant to focus specifically on the superintendent's performance throughout the year, reflecting progress on goals, performance against standards and any specific concerns the board may have.

An overall performance evaluation should never be a surprise to a superintendent or the board; evaluative check-ins throughout the year allow the superintendent to understand the board's perspective on the superintendent's performance, make any course corrections necessary, and ask for support where needed. We recommend that these check-ins occur quarterly and be embedded in the evaluation timeline adopted by the board.

TIMELINE

MAR.	APR.	MAY	JUNE	JULY	AUG.	SEPT.	OCT.	NOV.	DEC.
	JAN.	FEB.	MAR.		APR.				

PRE-EVALUATION

Adopt all standards, goals and evaluation procedures. This includes adopting materials for Parts 1 and 2, and adopting a schedule for Parts 3 and 4.

CHECK-IN MEETINGS

We recommend that these occur at least quarterly. These check-ins give the superintendent the opportunity to provide information related to goals and standards, and for the board to ask questions about progress. This also includes a final check-in in which the superintendent can present their self-evaluation. These are generally done in executive session. This correlates to Part 3.

GATHER INFORMATION

Board members rank the superintendent on Parts 1 and 2. If the board chose to have additional stakeholders fill out surveys or provide information, now is the time to conduct those surveys.

EVALUATION RESULTS

APPENDICES

APPENDIX A

PART 1

EVALUATION COMPONENT PERFORMANCE STANDARDS

INSTRUCTIONS

1. Following are descriptors of each of the eight performance standards. Each board member should rate all eight of the performance standards. Performance indicators are listed below each performance standard. These performance indicators suggest objective measures to consider. Do not rate each performance indicator separately; only rate the overall performance standard.
2. Your comments in support of your rating will be helpful during the board discussion for preparation of a summary evaluation form.
3. The board will meet in executive session to discuss the results and prepare a final summary evaluation form representing the consensus of the board.
4. The superintendent will be presented with the final summary report from the full board, not the individual evaluation forms. It is important that the board speak with one voice in evaluating the superintendent.

SUPERINTENDENT EVALUATION STANDARDS AND DESCRIPTORS

KEY:

4 = ACCOMPLISHED PERFORMANCE

Performance in this area is routinely outstanding and acts as a model for others.

3 = EFFECTIVE PERFORMANCE

Performance in this area consistently meets the standard.

2 = DEVELOPING

Performance occasionally meets the standard but is not yet consistent.

1 = INEFFECTIVE

Performance currently does not meet the standard.

Rate each of the following superintendent standards based on national standards (NELP). If you have no basis for a rating, please mark "NA" for not applicable. Support your ratings with comments for each section.

STANDARD 1

VISIONARY DISTRICT LEADERSHIP

DESCRIPTORS

- Leads a collaborative process with the board to design (or reaffirm) the district mission and vision that reflects a core set of values and priorities.
- Leads the diverse stakeholder involvement in the development (or revision) of the district's continuous improvement plan based upon the district's mission and vision.
- Implements the district's continuous improvement plan and communicates its progress.

RATING



COMMENTS

STANDARD 2

ETHICS AND PROFESSIONAL NORMS

DESCRIPTORS

- Ensures ethical decisions and cultivates professional norms and culture including equity, fairness, integrity, transparency, trust, collaboration and perseverance.
- Makes ethical and legal recommendations to the board.
- Models ethical behavior in their own conduct and cultivates ethical behavior in others.

RATING



COMMENTS

STANDARD 3

INCLUSIVE DISTRICT CULTURE

DESCRIPTORS

- Develops and maintains a supportive, equitable, culturally responsive and inclusive district culture.
- Evaluates, cultivates and advocates for equitable access to safe and nurturing schools, and the opportunities and resources necessary to support the success and well-being of each student.
- Ensures equitable, inclusive and culturally responsive instructional and behavioral support practices among teachers, administrators and staff.

RATING



COMMENTS

STANDARD 4

CULTURALLY RESPONSIVE INSTRUCTIONAL LEADERSHIP AND IMPROVEMENT

DESCRIPTORS

- Evaluates, designs, fosters and implements coherent systems of curriculum instruction, supports, assessment and instructional leadership.
- Implements coordinated systems of support, including coaching and professional development for staff.
- Manages an appropriate system of assessments, data collection and analysis that supports instructional improvements, equity, student learning and well-being, and instructional leadership.
- Ensures instruction throughout the district utilizes culturally responsive practices and all staff are trained.

RATING



COMMENTS

STANDARD 5

COMMUNICATION AND COMMUNITY RELATIONS

DESCRIPTORS

- Develops and implements effective and collaborative systems that engage multiple and diverse stakeholder groups.
- Engages and effectively communicates with diverse families, community partners and other constituencies to strengthen student learning.
- Cultivates relationships and partnerships with members of the business, civic and local government in support of their advocacy for district, school and community needs.
- Goes beyond the district and local community to advocate for students at the county, regional and/or state level.

RATING



COMMENTS

STANDARD 6

EFFECTIVE ORGANIZATIONAL MANAGEMENT

DESCRIPTORS

- Implements equitable strategies, processes and systems to recruit, hire, develop and retain high-performing personnel who demonstrate a shared commitment to student success.
- Establishes productive relationships with associations while managing labor relations and contracts effectively.
- Creates and maintains organizational structures that maximize the district's capacity to positively impact student learning.
- Creates a comprehensive system of professional development for all staff to continuously improve and increase their leadership capacity.

RATING



COMMENTS

STANDARD 7

EFFECTIVE FINANCIAL MANAGEMENT

DESCRIPTORS

- Develops a proposed budget in accordance with board priorities and district direction.
- Manages the equitable implementation of district resources aligned with the budget adopted by the board.
- Communicates the budget priorities and ensures regular updates on implementation of the budget.

RATING



COMMENTS

STANDARD 8

POLICY, GOVERNANCE AND ADVOCACY

DESCRIPTORS

- Develops relationships, leads collaborative decision-making and governance, and represents and advocates for district needs in local, county and state policy conversations.
- Cultivates a respectful and responsive relationship with the district board of education focused on achieving the shared mission and vision of the district.
- Implements, maintains and communicates district, state and national policy, laws, rules and regulations to staff, board and other appropriate stakeholders.

RATING



COMMENTS

APPENDIX B

PART 2

EVALUATION COMPONENT GOALS

INSTRUCTIONS

In addition to the performance standards, boards and superintendents may wish to develop one to three specific superintendent goals to be used in the evaluation process. These goals should be based on the superintendent's previous evaluation and/or the district's current strategic initiatives or goals. Ideally, these goals should be developed collaboratively. The superintendent's goals should reflect his/her role in achieving the overall goals of the district but are not the same as the overall district goals.

1. Each board member should rate the superintendent's performance in meeting their evaluative goals agreed to by the superintendent and the board at the beginning of the evaluation process.
2. Your comments in support of your rating will be helpful during the board discussion for preparation of a summary evaluation report.
3. The board will meet in executive session to discuss the results and prepare a final summary evaluation report representing the consensus of the board.
4. The superintendent will be presented with the final summary report from the full board, not the individual evaluations. **It is important that the board speaks with one voice in evaluating the superintendent.**

**SAMPLE
GOAL STATEMENT 1:**

PERFORMANCE INDICATORS:

(Insert indicators of success here)

1.1

1.2

1.3

1.4

1.5

SUMMARY RATING — GOAL 1: *(check one)*

4

3

2

1

N/A

COMMENTS:

APPENDIX C

PART 3

EVALUATION COMPONENT ARTIFACTS OF EVIDENCE/SELF-EVALUATION

The superintendent may be asked to provide additional information to support the board in their evaluation of the performance standards/evaluation goals. In an ideal board-superintendent relationship the board may have very little direct knowledge of the superintendent's day-to-day operations. Artifacts of evidence are intended to give the board objective information concerning specific performance standards/evaluation goals. The following table is intended to give some possible examples for each standard; this is not intended to be an exhaustive list. These artifacts may be collaboratively identified at the beginning of the evaluation cycle by the board and superintendent. Artifacts of evidence may also be used in the informal check-in process throughout the performance cycle.

STANDARD 1: VISIONARY DISTRICT LEADERSHIP

DESCRIPTORS	ARTIFACTS
<ul style="list-style-type: none">• Leads a collaborative process with the board to design (or reaffirm) the district mission and vision that reflects a core set of values and priorities.• Leads the diverse stakeholder involvement in the development (or revision) of the district's continuous improvement plan based upon the district's mission and vision.• Implements the district's continuous improvement plan and communicates its progress.	<ul style="list-style-type: none">• Evidence of how you have constructed and enacted an equity vision and mission across the district and community:<ul style="list-style-type: none">• Newspaper, school banners, website, photo, or other media• Actions communicating clear and coherent vision: newsletter, professional development, etc.• Meetings or presentations to collaborate and implement vision, mission, goals and plans• Models learning through attending professional development opportunities and applying knowledge (transparency)• Presentation of at least one plan (e.g., CIP or SIA application)• Resources are clearly aligned with the vision and strategic initiatives:<ul style="list-style-type: none">• Budget examples of how funds support the vision/strategic initiatives• Staffing patterns that reflect where there is an identified need• Data support goals that are aligned to student learning and growth• Personalized SMART goals focused on student learning and achievement that are specific enough to address short- and long-term plans

STANDARD 2: ETHICS AND PROFESSIONAL NORMS

DESCRIPTORS

- Ensures ethical decisions and cultivates professional norms and culture including equity, fairness, integrity, transparency, trust, collaboration and perseverance.
- Makes ethical and legal recommendations to the board.
- Models ethical behavior in their own conduct and cultivates ethical behavior in others.

ARTIFACTS

- Agendas and/or minutes from meetings (e.g., community planning, key communicators/advisory meetings, administrative, curriculum team, District Leadership Team, etc.) that demonstrate transparency and equitable practices
- Evidence of ability to confront conflict and build consensus
- Record of solicitation of feedback (collaboration and transparency) and evidence of reflective practice and adaptation
- Reflective journals and evidence of adaptative behavior
- Equity and inclusion plan
- Agendas and/or minutes from meetings that demonstrate collaboration with external partners

STANDARD 3: INCLUSIVE DISTRICT CULTURE

DESCRIPTORS

- Develops and maintains a supportive, equitable, culturally responsive and inclusive district culture.
- Evaluates, cultivates and advocates for equitable access to safe and nurturing schools, and the opportunities and resources necessary to support the success and well-being of each student.
- Ensures equitable, inclusive and culturally responsive instructional and behavioral support practices among teachers, administrators and staff.

ARTIFACTS

- Discipline trends (# of expulsions, days of suspension, disaggregated data by sub-groups and groups of interest, # of restraints/seclusions, etc.)
- Diversity training/awareness plan; evidence of an equity lens and implementation of the plan
- Sections in employee handbooks that demonstrate an inclusive district culture
- External reviews and audits (e.g., budget, nutrition, transportation, safety, OCR, etc.)
- Evidence that all student needs are addressed equitably
- Response to staff or public concerns/issues (documentation)
- State plans and reports (ELL, SPED, CIP, Title, etc.)
- Student learning data from a variety of sources (SBAC, benchmark/ interim assessments, etc.) to monitor progress and achievement (including disaggregated data)
- Uses data from a variety of sources to inform planning, management of resources, impact instruction and close achievement gaps (including disaggregated by sub-groups and groups of interest)
- Evidence of staff use of equitable instructional practices such as culturally responsive pedagogy and strategies

STANDARD 4: CULTURALLY RESPONSIVE INSTRUCTIONAL LEADERSHIP AND IMPROVEMENT

DESCRIPTORS

- Evaluates, designs, fosters and implements coherent systems of curriculum instruction, supports, assessment and instructional leadership.
- Implements coordinated systems of support, including coaching and professional development for staff.
- Manages an appropriate system of assessments and data collection, and analysis that supports instructional improvements, equity, student learning and well-being, and instructional leadership.
- Ensures instruction throughout the district utilizes culturally responsive practices and all staff are trained.

ARTIFACTS

- Agendas and/or minutes (e.g., community planning, key communicators/advisory meetings, administrative team, curriculum team, District Leadership Team, etc.)
- Common teacher instructional planning time (agendas, outcome date, samples, etc.)
- Comprehensive School/District Improvement Plan (CIP)
- Curriculum and/or instructional audit (documentation)
- Documentation of coaching and evaluation of administrative staff in instructional practices, curriculum and assessment
- Instruction related professional development/growth plans (with related data on student achievement)
- Models learning through attendance and application of knowledge from professional development opportunities (documentation)
- Evidence of annual review of district's mission statement and alignment to practice
- Evidence of teachers examining and using student achievement data to improve teaching/learning
- Facilitation of District Leadership Team (learning team with all levels of stakeholders from board to classified)
- Program evaluations that address areas of interest or concern (e.g., outreach, equity, behavioral supports, bullying/harassment, character education, etc.)
- Student learning data from a variety of sources (SBAC, benchmark/ interim assessments, etc.) to monitor progress and achievement
- Uses data from a variety of sources to inform planning, management of resources, impact instruction and close achievement gaps (including disaggregated by sub-groups and groups of interest)

STANDARD 5: COMMUNICATION AND COMMUNITY RELATIONS

DESCRIPTORS

- Develops and implements effective and collaborative systems that engage multiple and diverse stakeholder groups.
- Engages and effectively communicates with diverse families, community partners and other constituencies to strengthen student learning.
- Cultivates relationships and partnerships with members of the business, civic and local government in support of their advocacy for district, school and community needs.
- Goes beyond the district and local community to advocate for students at the county, regional and/or state level.

ARTIFACTS

- Evidence of participation in community/school events
- Accounts of school and district accomplishments and communications in various forms of public media (including website, newsletters, podcasts, public engagement documents, etc.)
- Administrative “calendar” – critical dates calendar (due dates, etc.) and board presentation cycle/annual reports
- Agendas and/or minutes (e.g., community planning, key communicators/advisory meetings, administrative team, curriculum team, collaborative group, stakeholder groups, District Leadership Team, etc.)
- Communication vehicles or methods that make the school vision visible to stakeholders including using technology, number of visits to website, etc.
- Formal or informal community partnership agreements and plans to support collaborative efforts to achieve district goals/priorities
- Memberships and participation with community organizations (e.g., PTA, city council, etc.)
- Participation in state, regional and national initiatives (documentation)
- Presentations to stakeholders (including civic groups, staff, parents, community groups, etc.)
- Response to public and/or stakeholder concerns/issues (documentation)
- Union collaboration (e.g., minutes, negotiations, grievances, etc.)
- Visible support for district goals and priorities from stakeholders and community leaders, such as educational foundation, civic clubs, city council, law enforcement, etc.
- An internal or external communication plan
- Schedules of staff meetings, administrative council meetings, etc.

STANDARD 6: EFFECTIVE ORGANIZATIONAL MANAGEMENT

DESCRIPTORS

ARTIFACTS

- | DESCRIPTORS | ARTIFACTS |
|--|---|
| <ul style="list-style-type: none"> • Implements equitable strategies, processes and systems to recruit, hire, develop and retain high-performing personnel who demonstrate a shared commitment to student success. • Establishes productive relationships with associations while managing labor relations and contract effectively. • Creates and maintains organizational structures that maximize the district's capacity to positively impact student learning. • Creates a comprehensive system of professional development for all staff to continuously improve and increase their leadership capacity. | <ul style="list-style-type: none"> • Staff recruitment and retention plan (including demographics to match student and community population) • Union collaboration (minutes, negotiations, grievances, etc.) • Uses data from a variety of sources to inform labor trends, negotiations and bargaining • Hiring process (guidelines, procedures, schedules, plan for retention and recruitment, mentoring, focus on diversity, etc.) • Staff attendance and retention rates • Development plans for improving the capacity of leadership at all levels • Documentation of coaching for instruction, curriculum, assessment and inclusion • Meaningful engagement of staff to improve cultural competency and equitable practice (documentation) • Staff evaluations are complete and include evidence of coaching and evaluation of administrative leaders |

STANDARD 7: EFFECTIVE FINANCIAL MANAGEMENT

DESCRIPTORS

- Develops a proposed budget in accordance with board priorities and district direction.
- Manages the equitable implementation of district resources aligned with the budget adopted by the board.
- Communicates the budget priorities and ensures regular updates on implementation of the budget.

ARTIFACTS

- District budget reflects priorities and expectations
- Economic vision that includes participation with community development groups/stakeholders
- Enrollment trend forecasts
- External reviews and audits (e.g., budget, child nutrition, transportation, safety, etc.)
- Financial plan: end-of-year budget status report, three- to five-year plan, long-range plan, etc.
- Grants received/applied for that are aligned with goals of the district, plans for sustainability
- Program evaluations that address areas of interest or concern (e.g., outreach, equity, behavioral supports, bullying/harassment, character education, etc.)
- Construction project(s) management, including timelines, budgets and implementation techniques
- Policies/procedures for management of funds and other resources to make progress or achieve district goals

STANDARD 8: POLICY, GOVERNANCE AND ADVOCACY

DESCRIPTORS

- Develops relationships, leads collaborative decision-making and governance, and represents and advocates for district needs in local, county and state policy conversations.
- Cultivates a respectful and responsive relationship with the district board of education focused on achieving the shared mission and vision of the district.
- Implements, maintains and communicates district, state and national policy, laws, rules and regulations to staff, board and other appropriate stakeholders.

ARTIFACTS

- Administrative team meeting agendas
- Board and administrative goals
- Board meeting agendas
- Timeliness of board packets
- Board policy and administrative regulation enforcement that is reflective of the vision with supporting materials
- Collaborative partners (documentation)
- Comprehensive District Improvement Plan
- External reviews and audits (e.g., budget, policy, child nutrition, transportation, safety, etc.)
- Onboarding plan for board members to understand roles and responsibilities
- Meaningful interpretive reports of student achievement data delivered in accessible language
- Notes from state officials
- Participation in state, regional, national initiatives (documentation)
- State plans and reports (ELL, SPED, CIP, Title, etc.)
- State Report Card data (including disaggregated data by sub-groups and groups of interest)
- Work with city council on city/school initiatives (documentation)
- Participation in state off-the-record meetings, legislative priority meetings, Education Leadership Coalition meetings, etc.

APPENDIX D

PART 4

EVALUATION COMPONENT TARGETED FEEDBACK SURVEY

The targeted feedback survey (TFS) is an optional component meant to give the superintendent and board additional feedback about the performance of the superintendent. The process asks a “targeted” group of stakeholders for feedback via a survey, with questions tied to superintendent performance standards and goals. The board and superintendent should develop an agreed upon list of individuals that will receive the survey. An independent party should conduct the TFS and summarize the results of the survey to report back to the board.

Suggested participants in the TFS may include district administrators, school administrators, union leaders, teacher leaders, confidential staff, families and community leaders. Multiple participants reflect the collective wisdom of groups who work closely with the superintendent. The feedback survey provides a variety of stakeholders an opportunity to share their understanding of how the top education leader for their district is performing. It is highly recommended that participants have regular interaction with the superintendent in order to give helpful feedback via the survey.

STEPS FOR CONDUCTING A TARGETED FEEDBACK SURVEY

- **STEP 1**

It is recommended that the superintendent and board work with an independent consultant to determine the questions for the feedback survey. The consultant should administer the survey and provide the results to the board. Questions should reflect the superintendent’s goals, performance standards and district priorities; these are unique to each district. If you purchase this service, OSBA will work with the board to develop questions appropriate for each group of participants, administer the survey, collect the data and provide the information to the board for consideration in their evaluation of the superintendent.

- **PART 2**

The OSBA consultant will work with your board to develop questions for the TFS. The questions will be aligned to the standards in this workbook and should reflect the expected experience of each group being surveyed. For example, classroom teachers will have a different kind of communication with and access to the superintendent than families will; it is critical that survey questions be appropriately tailored to each group. The board should mitigate barriers to accessibility for the survey, particularly with respect to language and access to technology.

- **STEP 3**

Select the participants to respond to the TFS. The participants should represent an appropriate range of constituent groups that have regular interactions with the superintendent. Responses from participants should be anonymous. The number or participants should be manageable in terms of compiling the results.

- **STEP 4**

The OSBA consultant will distribute the feedback survey electronically with an introductory section explaining the purpose of the survey and assurance that the individual survey results are completely confidential. Approximately two to three weeks should be provided for survey responses to be completed. Frequent reminders may need to be sent to the survey group about completion of the survey.

- **STEP 5**

The OSBA consultant will review the survey results with the board in executive session, highlighting areas of strength identified in the survey and noting any areas for targeted focus and/or improvement.

- **STEP 6**

The board should utilize the survey results as one source of data when evaluating the superintendent. This information should be considered along with the superintendent's self-evaluation, artifacts of evidence and board members direct experience and observation of the superintendent's performance.

APPENDIX E

PART 5

SAMPLE EVALUATION SUMMARY

Below is a sample summary of a board's evaluation of its superintendent.

The board of directors of the (name) school district has completed the annual evaluation of Superintendent (name) for (year). All (number) board members have served on the board for at least one full year and have been able to observe and be a part of the successes achieved this year.

The evaluation focused on 1) eight professional standards and 2) superintendent goals.

Regarding the eight professional standards, we determined that Superintendent (name)'s performance was exemplary in the areas of visionary leadership, communications and community relations, and effective management. In the areas of policy and governance, curriculum planning and development and labor relations, the board felt his/her performance was strong. Instructional leadership, resource management and ethical leadership all received a rating of average.

The board determined that Superintendent (name) has done an outstanding job of attaining the goal set by the board and superintendent in August of last year to update and align the elementary language arts and reading curriculum. His/her success at achieving the goal of improving staff morale and retaining professional staff was rated good. Success in meeting the third goal, raising high school math competency and performance on tests, was also rated good.

[The board and superintendent chose to distribute a targeted feedback survey to members of the staff and community for feedback on his/her performance. The results of this survey were one source of data in the consideration of the performance of the superintendent. We have received the results of that feedback, which reflects that staff morale has improved and that significant curriculum results have been achieved at the elementary level. He/she also shared with us his/her desire to further improve staff morale and focus on bringing the community together in support of the schools.]

We will be working with Superintendent (name) over the next several weeks to develop goals for the superintendent aligned with our district goals and look forward to working together to continue the success of our district.



**OREGON SCHOOL
BOARDS ASSOCIATION**

1201 Court St NE, Ste 400 | Salem, OR 97301
503-588-2800 or 800-578-6722
www.osba.org | info@osba.org



**COALITION OF OREGON
SCHOOL ADMINISTRATORS**

707 13th St SE, Suite 100 | Salem, OR 97301
503-581-3141
www.cosa.k12.or.us



2025-2026 Superintendent Evaluation Timeline

Date	ACTION
Open Session December 9th	Approve superintendent evaluation process and tool for 2025-2026 school year.
January 13th	Board and staff evaluation survey of the superintendent due to the board secretary. <i>Board secretary will compile the results (i.e., all board ratings and comments); which will then be provided to the board when they are discussing their own individual evaluations of the superintendent and developing the summative evaluation report.</i>
Executive Session <i>unless otherwise requested by the superintendent to be done in open session ORS 192.660(2)(i).</i> February 10th	<ol style="list-style-type: none">1. Superintendent presents their self-eval and/or artifacts of evidence of performance to the board.2. Superintendent exits3. Board discusses their own individual evaluations <i>(i.e., the compiled results of their own direct experience/observation of the superintendent's performance of standards and superintendent goals, if applicable). During this time, the board will also take into consideration the superintendent's self-evaluation/artifacts of evidence to develop the board's written summative evaluation report. (Speak with one voice)</i>
March 3th	Board chair presents a draft of the summative evaluation report to the superintendent. <i>Typically, at least 3-5 business days for superintendent to review.</i>
Executive Session <i>unless otherwise requested by the superintendent to be done in open session ORS 192.660(2)(i).</i> March 10th	Executive session for the superintendent to ask any clarifying questions of the report, superintendent exits, board discusses, makes any changes, if necessary, comes out of executive session and votes in open session to approve the summative evaluation. <i>A copy of the final written summative evaluation form is placed in the superintendent's personal folder.</i>

Student Transportation in Private Vehicles

Transportation of students will be by the district's transportation system or by a district employee's vehicle, properly insured, except as provided below.

Parents, employees and other designated adults may be permitted to use private vehicles to transport students other than their own on field trips or other school activities if the following conditions have been met prior to the activity:

1. The school administrator has approved the activity;
2. A permission slip signed by the student's parent(s) has been received by the principal or his/her designee, granting permission for the student to participate in the field trip/activity and to ride in a privately-owned vehicle;
3. The parent, employee or other adult driving the vehicle is properly licensed to drive and has provided proof of insurance. Such insurance shall meet or exceed minimum requirements as established by the state of Oregon and as set by the district;
4. The vehicle contains an adequate number of seat restraints, including when applicable, a child safety system for a child who weighs less than 40 pounds four or five years of age or who weighs between 40 and 60 pounds, regardless of age, and the adult driver requires their use. The child safety system must elevate the person so that a safety belt or safety harness properly fits the individual and meets the minimum standards and specifications of law. Training in the proper installation and use of child safety systems may be required. A person over 40 pounds or who has reached the upper weight limit for the forward-facing car seat must use a booster seat until they are four feet nine inches tall or age eight and the adult belt properly fits.¹
- 4.5. A person who is taller than four feet nine inches or eight years of age or older must be properly secured with a safety belt or harness that meets the requirements under Oregon Revised Statute (ORS) 815.055. Training in the proper installation and use of child safety system may be required.

The district will develop procedures to implement this policy.

END OF POLICY

¹ "Proper fit" means the lap belt of the safety belt or safety harness is positioned low across the thighs and the shoulder belt is positioned over the collarbone and away from the neck.

Legal Reference(s):

[ORS 801.455](#)
[ORS 811.210](#)
[ORS 815.055](#)

[ORS 806.010 – 806.020](#)
[ORS 815.080](#)

[ORS 332.107](#)
[OAR 735-102-0010](#)

Yamhill-Carlton School District 1

Code: EEAE
Adopted: 10/09/06

Student Transportation in Private Vehicles

Transportation of students will be by the district's transportation system or by a district employee's vehicle, properly insured, except as provided below.

Parents, employees and other designated adults may be permitted to use private vehicles to transport students other than their own on field trips or other school activities if the following conditions have been met prior to the activity:

1. The school administrator has approved the activity;
2. A permission slip signed by the student's parent(s) has been received by the principal or his/her designee, granting permission for the student to participate in the field trip/activity and to ride in a privately-owned vehicle;
3. The parent, employee or other adult driving the vehicle is properly licensed to drive and has provided proof of insurance. Such insurance shall meet or exceed minimum requirements as established by the state of Oregon and as set by the district;
4. The vehicle contains an adequate number of seat restraints, including when applicable, a child safety system for a child who weighs less than 40 pounds, regardless of age, and the adult driver requires their use. The child safety system must elevate the person so that a safety belt or safety harness properly fits the individual and meets the minimum standards and specifications of law. A person over 40 pounds or who has reached the upper weight limit for the forward-facing car seat must use a booster seat until they are four feet nine inches tall or age eight and the adult belt properly fits.¹
5. A person who is taller than four feet nine inches or eight years of age or older must be properly secured with a safety belt or harness that meets the requirements under Oregon Revised Statute (ORS) 815.055. Training in the proper installation and use of child safety system may be required.

The district will develop procedures to implement this policy.

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[OAR 735-102-0010](#)

¹ "Proper fit" means the lap belt of the safety belt or safety harness is positioned low across the thighs and the shoulder belt is positioned over the collarbone and away from the neck.

Yamhill-Carlton School District 1

Code: **EEBB**
Adopted: 10/09/06

Use of Private Vehicles for District Business

The Board discourages the use of private vehicles for district business, including the transportation of students. Staff will use district-owned vehicles whenever possible and should schedule activities and transportation far enough in advance to avoid any nonemergency use of private vehicles.

The superintendent will develop regulations for staff use of private vehicles that will safeguard the district, its employees and students in matters of safety, insurance and liability. The Board will review such regulations at least annually.

No staff member will use a private vehicle for district business, including the transportation of students, without approval in accordance with established district procedures. Authorization to use a private vehicle must be obtained before actual use of the vehicle. Staff members who are authorized to use a private vehicle on district business will be reimbursed in an amount established by the Board.

~~At least two staff members must accompany a student being transported in a private vehicle unless otherwise authorized by a principal. When transporting a single student in a private vehicle, at least two staff members must be present unless the principal has authorized an exception in advance and written parental consent has been obtained. A single staff member may transport multiple students with parental consent.~~

A student will not be allowed to perform district business with his/her own vehicle or a staff member's vehicle.

END OF POLICY

Legal Reference(s):

[ORS 30.260](#) - [30.265](#)
[ORS 332.107](#)
[ORS 801.455](#)
[ORS 811.210](#)
[ORS 815.055](#)
[ORS 815.080](#)
[OAR 735-102-0010](#)

~~Cross Reference(s):~~

~~DLC — Expense Reimbursements~~

Yamhill-Carlton School District 1

Code: **EEBB**
Adopted: 10/09/06

Use of Private Vehicles for District Business

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When transporting a single student in a private vehicle, at least two staff members must be present unless the principal has authorized an exception in advance and written parental consent has been obtained. A single staff member may transport multiple students with parental consent.

A student will not be allowed to perform district business with his/her own vehicle or a staff member's vehicle.

END OF POLICY

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[ORS 30.260](#) - [30.265](#)
[ORS 332.107](#)
[ORS 801.455](#)
[ORS 811.210](#)
[ORS 815.055](#)
[ORS 815.080](#)
[OAR 735-102-0010](#)

**Yamhill-Carlton
School District 1**

Code: **EEAE-AR**
Adopted: 11/10/25

Proof of Vehicle Liability Insurance

Dear _____,

You have agreed to transport students of the district to a field-trip function or for some other school-approved purpose. Please be aware that in the event of an accident, your insurance will provide primary coverage. In order to serve as a driver you will be required to provide proof of vehicle liability insurance. Your insurance must meet or exceed minimum requirements as established by the state of Oregon and as set by the district.

Please **COMPLETE** the following information, providing information requested. **SIGN** where indicated and **RETURN** to the school office four working days **PRIOR TO THE DATE OF THE EVENT**.

Insurance Company Name: _____ Expiration Date: _____
(not agent's name)

Policy Number: _____

Policy Limits: _____

Current minimum limits are: \$25,000 per person and \$50,000 per accident for bodily injury; \$20,000 per accident for property damage; \$25,000 per person and \$50,000 per accident for uninsured motorist coverage; and \$15,000 per accident for personal injury protection.

Date of Birth: _____ Oregon Driver License No.: _____

Signature: _____ Date: _____

Name (as it appears on your driver license): _____

Address: _____

Daytime Phone: _____

Return form to fiscal officer. If you do not have required coverage, you will not be allowed to transport students. (Insurance companies may increase coverage for specific dates.)