







## Marion Soil and Water Conservation District (MSWCD) Board of Directors Meeting Agenda **DRAFT** Wednesday, June 7, 2023, 6:30 pm to 9:00 pm

HB2560 requires that all Oregon public meetings held by a governing body of a public body, excluding executive sessions, must provide to members of the public an opportunity to access and attend the meeting by telephone, video or other electronic or virtual means. This meeting will be held in-person at our location in Stayton, OR, by video conference, and by telephone. Please inform the MSWCD if you would like to attend in-person (as space is limited), contact by phone, 503-391-9927 or visit [www.marionswcd.net](http://www.marionswcd.net) at least 24 hours in advance for assistance.

-  **Link to Video Conference:** [\(Zoom\) Meeting Link \(Click Here\)](#)
-  **Meeting Telephone Number:** 1-253-215-8782
-  **Meeting ID:** 885 8307 3615 | **Passcode:** 878679
-  **Staff Contact:** Brenda Sanchez (503-871-7311) | [brenda.sanchez@marionswcd.net](mailto:brenda.sanchez@marionswcd.net)

### Agenda **DRAFT**

**6:30 PM Start, Chair:** Call Meeting to Order, Roll Call, and New Business.

Item #	Topic	Presenter	Purpose	Time
1	Public Comment	Public	Feedback	5 min.
2	District Snapshot	District Manager	Report	5 min.
3	Treasurers Report April and May 2023	Secretary-Treasurer	Review Action	10 min.
4	USDA Services Report	Bachelor	Report	10 min.
5	Review of April 4, May 3, 2023, Board Meeting Minutes and Budget Hearing Minutes	Secretary-Treasurer	Review Action	10 min.
6	Performance Evaluations and Proposed Step Increases	District Manager	Review Action	10 min.
7	Personnel Policy Handbook-DRAFT	District Manager	Discussion	10 min.
8	Conservation Assistance Grants			
	a. Extension/ Cancellation Requests	Chair	Review Action	5 min.
	b. Grants Completed	Chair	Review	5 min.

### New Business

This section available to add new business and agenda additions.

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**Meeting Adjournment**

Chair



Marion Soil and Water Conservation District complies with the American with Disabilities Act (ADA) and does not discriminate based on race, color, national origin, gender, religion, age, disability, political beliefs, sexual orientation, and marital or family status. If special physical, language, or other accommodations are needed for this meeting, please advise the District Manager at 503-391-9927 as soon as possible, and at least 48 hours in advance of the meeting.



# April 2023 Treasurer's Report **DRAFT** Executive Summary

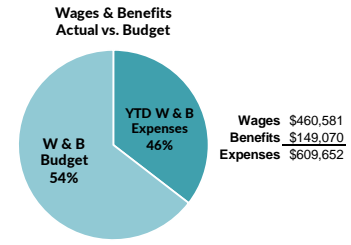
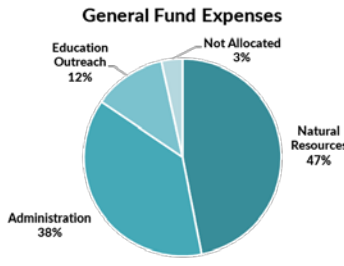
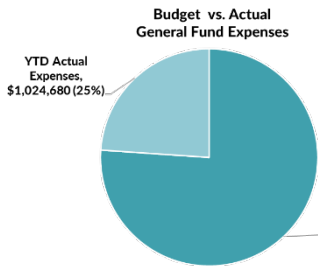
## General Fund Resources April 1: \$2,252,335.79

### General Fund April Income

Income (rent, grants, plant sale)	\$1,138.17
Previous Years Levied Taxes Received	\$903.84
Current Year Levied Taxes Received	\$14,538.09
Dividends (Interest)	\$7,418.24
	<b>= \$23,998.34</b>

### Year to Date (YTD) Income

Income (rent, grants, plant sale)	\$168,985.33 (46.2% of Adopted Budget)
Previous Years Levied Taxes Received	\$54,888.78 (203.3%)
Current Year Levied Taxes Received	\$1,315,291.01 (98.1%)
Dividends (Interest)	\$49,787.28 (497.9%)
	<b>= \$1,588,952.40</b>



General Fund Expenses	Administration	Natural Resources	Education	Not Allocated
April Expenses	\$30,180.87	\$33,830.40	\$10,500.13	\$0.00
22-23 Adopted Budget	\$869,825.00	\$1,511,610.00	\$266,246.00	\$612,000.00
YTD Expenses	(-) \$386,461.14	(-) \$480,610.10	(-) \$122,178.87	(-) \$35,429.90
YTD Balance	\$483,363.86	\$1,030,999.90	\$144,067.13	\$576,570.10
<b>Conservation Grants</b>	<b>*Budget</b>	<b>YTD Expenses</b>	<b>Balance</b>	
(Natural Resource Program Expense)	\$781,786.00	\$128,281.31	\$653,504.69	

### General Fund Adopted Budget vs. Actual Income & Expenses

Adopted FY22-23 Budget	\$3,259,680.75
YTD Actual Budget	\$3,209,295.36 (98.45%)
YTD General Fund Expenses Through April	(-) \$1,024,680.01
<b>General Fund Resources for May</b>	<b>\$2,177,824.39</b>

Budget Reserves	Multi-Purpose	Building
22-23 Reserves	\$316,271.00	\$262,307.00
Year to Date Resources	\$0.00	\$6,790.07 (12% of LGIP Dividends)
Balance	\$316,271.00	\$269,097.07

### US Bank Checking Account Summary for April

- US Bank Checking Beginning Balance = \$66,347.05
  - Checks Paid = \$18,332.38 (22 checks)
    - Includes Credit Card Expenses = [\$1,733.00]
  - Electronic Withdrawals = \$53,580.57 (6 E-Pay)
- Deposits = \$101,138.17
- US Bank Checking Ending Balance = \$95,572.27



### Account Statement - Transaction Summary

For the Month Ending **April 30, 2023**

MARION SOIL & WATER CONSERV DIST - MARION SOIL AND WATER CONSERVATION DIST

Oregon LGIP	
Opening Balance	2,741,459.79
Purchases	23,871.75
Redemptions	(100,000.05)
<b>Closing Balance</b>	<b>\$2,665,331.49</b>
Dividends	8,429.82

Asset Summary		
	April 30, 2023	March 31, 2023
<b>Oregon LGIP</b>	2,665,331.49	2,741,459.79
<b>Total</b>	<b>\$2,665,331.49</b>	<b>\$2,741,459.79</b>



## Account Statement

For the Month Ending **April 30, 2023**

**MARION SOIL & WATER CONSERV DIST - MARION SOIL AND WATER CONSERVATION DIST**

Trade Date	Settlement Date	Transaction Description	Share or Unit Price	Dollar Amount of Transaction	Balance
<b>Oregon LGIP</b>					
<b>Opening Balance</b>					<b>2,741,459.79</b>
04/03/23	04/03/23	LGIP Fees - ACH Redemption (1 @ \$0.05 - From 4879) - March 2023	1.00	(0.05)	2,741,459.74
04/10/23	04/10/23	Transfer from MARION COUNTY TREASURER - MARION COUNTY	1.00	15,441.93	2,756,901.67
04/26/23	04/26/23	Redemption - ACH Redemption	1.00	(100,000.00)	2,656,901.67
04/28/23	05/01/23	Accrual Income Div Reinvestment - Distributions	1.00	8,429.82	2,665,331.49
<b>Closing Balance</b>					<b>2,665,331.49</b>

	Month of April	Fiscal YTD July-April		
<b>Opening Balance</b>	2,741,459.79	2,084,031.37	<b>Closing Balance</b>	2,665,331.49
<b>Purchases</b>	23,871.75	1,411,300.62	<b>Average Monthly Balance</b>	2,736,445.41
<b>Redemptions</b>	(100,000.05)	(830,000.50)	<b>Monthly Distribution Yield</b>	3.75%
<hr/>				
<b>Closing Balance</b>	<b>2,665,331.49</b>	<b>2,665,331.49</b>		
<b>Dividends</b>	8,429.82	56,578.24		

**Marion Soil and Water Conservation District**  
**Reconciliation Detail**  
1015 · LGIP Savings, Period Ending 04/30/2023

Type	Date	Num	Name	Clr	Amount	Balance
<b>Beginning Balance</b>						2,741,459.79
<b>Cleared Transactions</b>						
<b>Checks and Payments - 2 items</b>						
Check	04/03/2023			X	-0.05	-0.05
Transfer	04/25/2023			X	-100,000.00	-100,000.05
Total Checks and Payments					-100,000.05	-100,000.05
<b>Deposits and Credits - 2 items</b>						
Deposit	04/12/2023			X	15,441.93	15,441.93
Deposit	04/28/2023			X	8,429.82	23,871.75
Total Deposits and Credits					23,871.75	23,871.75
Total Cleared Transactions					-76,128.30	-76,128.30
Cleared Balance					-76,128.30	2,665,331.49
Register Balance as of 04/30/2023					-76,128.30	2,665,331.49
<b>Ending Balance</b>					<b>-76,128.30</b>	<b>2,665,331.49</b>



P.O. Box 1800  
Saint Paul, Minnesota 55101-0800

3223 IMG 6480 S Y ST01

Account Number: [REDACTED]

Statement Period:  
Apr 3, 2023  
through  
Apr 28, 2023



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000042529 00 SP 106481724987937 S  
MARION SOIL & WATER  
CONSERVATION DISTRICT  
PO BOX 537  
STAYTON OR 97383-0537



To Contact U.S. Bank

Commercial Customer

Service: 877-295-2509

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Internet: [usbank.com](http://usbank.com)

### INFORMATION YOU SHOULD KNOW

Thank you for choosing U.S. Bank. We're committed to keeping you up to date on your account and would like to remind you of a recent change to our *Night Deposit Agreement*, effective April 14, 2023. If you utilize the night drop service, you may review the revised *Night Depository Service Standard Terms and Conditions* online at [usbank.com](http://usbank.com), request a copy by calling 800-USBANKS (872-2657), or obtain a copy by visiting your local U.S. Bank branch. By continuing to use our night deposit services after April 14, 2023, you accept and agree to these updated terms. If you have any questions, please call us at U.S. Bank 24-Hour Banking at 800-USBANKS (872-2657).

### PREMIUM BUSINESS CHECKING

Member FDIC

U.S. Bank National Association

Account Number [REDACTED]

#### Account Summary

	# Items		
Beginning Balance on Apr 3		\$	66,347.05
Customer Deposits	1		400.00
Other Deposits	2		100,738.17
Other Withdrawals	6		53,580.57-
Checks Paid	22		18,332.38-
<b>Ending Balance on Apr 30, 2023</b>		<b>\$</b>	<b>95,572.27</b>

#### Customer Deposits

Number	Date	Ref Number	Amount
	Apr 5	8614272495	400.00

**Total Customer Deposits \$ 400.00**

#### Other Deposits

Date	Description of Transaction	Ref Number	Amount
Apr 17	Electronic Deposit REF=231070027831620N00	From www.marionswcd.n 1800948598www.marionST-P8Z4C8K9H3I9	\$ 738.17
Apr 26	Electronic Deposit REF=231150131401010Y00	From OREGON ST TREAS 9400817099LGIP ACH 3701949	100,000.00

**Total Other Deposits \$ 100,738.17**

#### Other Withdrawals

Date	Description of Transaction	Ref Number	Amount
Apr 14	Analysis Service Charge	1400000000	\$ 91.10-
Apr 19	Electronic Withdrawal REF=231080125612050N00	To OR REVENUE DEPT 9302015091TAXPAYMENT478903424	3.01-
Apr 21	Electronic Withdrawal REF=231110012720320N00	To NORTHWEST NATURA 0000000160BILLPAY NW NATURAL 8004	289.07-
Apr 26	Electronic Withdrawal REF=231150169345780Y00	To COMMERCIAL GROUP M930863097WEB PYMNT 543096258	8,754.20-
Apr 27	Electronic Withdrawal REF=231160119389820N00	To IRS 3387702000USATAXPYMT225351755824346	11,062.44-



MARION SOIL & WATER  
 CONSERVATION DISTRICT  
 PO BOX 537  
 STAYTON OR 97383-0537

Account Number: [REDACTED]

Statement Period:

Apr 3, 2023

through

Apr 28, 2023

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**PREMIUM BUSINESS CHECKING**

**(CONTINUED)**

U.S. Bank National Association

Account Number [REDACTED]

**Other Withdrawals (continued)**

Date	Description of Transaction	Ref Number	Amount
Apr 27	Electronic Withdrawal REF=231160199774470N00	To INTUIT PAYROLL S 1722616679QUICKBOOKS930633163	33,380.75-
<b>Total Other Withdrawals</b>			<b>\$ 53,580.57-</b>

**Checks Presented Conventionally**

Check	Date	Ref Number	Amount	Check	Date	Ref Number	Amount
13631	Apr 6	8914363793	32.25	13714	Apr 17	8017003365	325.00
13693*	Apr 17	8016813280	75.98	13715	Apr 12	8611719077	75.00
13705*	Apr 7	9214638122	7,500.00	13716	Apr 11	8316082715	654.61
13706	Apr 4	8316428928	2,000.00	13717	Apr 14	9214633194	100.00
13707	Apr 3	8017145558	2,295.00	13718	Apr 11	8315956024	159.69
13708	Apr 17	8016005901	102.98	13719	Apr 10	8016535051	814.00
13709	Apr 17	8016005888	2,110.66	13720	Apr 11	8316061998	99.95
13710	Apr 6	8914363519	53.71	13722*	Apr 26	8613650279	27.50
13711	Apr 6	8914363792	266.54	13726*	Apr 28	9214115737	1,054.00
13712	Apr 6	8912462744	168.63	13728*	Apr 27	8913861481	154.33
13713	Apr 11	8316061005	120.42	13729	Apr 26	8613922283	142.13
<b>Conventional Checks Paid (22)</b>							<b>\$ 18,332.38-</b>

\* Gap in check sequence

**Balance Summary**

Date	Ending Balance	Date	Ending Balance	Date	Ending Balance
Apr 3	64,052.05	Apr 10	53,616.92	Apr 19	50,436.69
Apr 4	62,052.05	Apr 11	52,582.25	Apr 21	50,147.62
Apr 5	62,452.05	Apr 12	52,507.25	Apr 26	141,223.79
Apr 6	61,930.92	Apr 14	52,316.15	Apr 27	96,626.27
Apr 7	54,430.92	Apr 17	50,439.70	Apr 28	95,572.27

Balances only appear for days reflecting change.



Marion Soil and Water Conservation District

5/26/2023 8:11 AM

Register: 1010 · US Bank Checking

From 04/01/2023 through 04/30/2023

Sorted by: Date, Type, Number/Ref

Date	Number	Payee	Account	Memo	Payment	C	Deposit	Balance
04/05/2...			4020 · Office Rent I...	Deposit		X	400.00	51,377.20
04/05/2...	13708	US Bank Credit C...	2012 · US Bank Cre...	Acct # ***7585	102.98	X		51,274.22
04/05/2...	13709	US Bank Credit C...	2013 · US Bank Cre...	Acct # -7585	2,110.66	X		49,163.56
04/05/2...	13710	Blank, Chelsea E.L.	-split-	Reimburseme...	53.71	X		49,109.85
04/05/2...	13711	Hamilton, Sarah C	-split-	Reimburseme...	266.54	X		48,843.31
04/05/2...	13712	Calkins, Janice L	6347 · Public Events...	Reimburseme...	168.63	X		48,674.68
04/05/2...	13713	City of Stayton - w...	-split-	Acct #7.154...	120.42	X		48,554.26
04/05/2...	13714	Creekside Landsc...	6291 · Facility Expe...	INV #27560 ...	325.00	X		48,229.26
04/05/2...	13715	Jenny Brausch Bus...	6177 · Contracted S...	INV#2391	75.00	X		48,154.26
04/05/2...	13716	Garten Services	-split-	INV012885	654.61	X		47,499.65
04/05/2...	13717	Oregonians for Fo...	6160 · Dues and Sub...	2023 Membe...	100.00	X		47,399.65
04/05/2...	13718	PetroCard Inc.	6110 · Vehicle Expe...	INV #C119988	159.69	X		47,239.96
04/05/2...	13719	Select Impressions	-split-	Cust # 1717 I...	814.00	X		46,425.96
04/05/2...	13720	SCTC	6290 · Communicati...	Account #: 2...	99.95	X		46,326.01
04/12/2...	13721	Roosth, Rachel K	-split-	Master Natur...	339.98			45,986.03
04/12/2...	13722	Abide Web Design...	6177 · Contracted S...	INV #2141	27.50	X		45,958.53
04/12/2...	13723	Foundant Technol...	6350 · TRAVEL & ...	Inv #C-INV2...	800.00			45,158.53
04/12/2...	13724	Pacific Office Aut...	6177 · Contracted S...	Inv #3S0577...	160.97			44,997.56
04/12/2...	13725	Republic Services	6291 · Facility Expe...	Account #3-0...	46.72			44,950.84
04/14/2...			6177 · Contracted S...	Service Charge	91.10	X		44,859.74
04/17/2...			4160 · Native Plant ...	Deposit		X	738.17	45,597.91
04/17/2...	E-pay	Oregon Departmen...	-split-	0294320-2	3.47			45,594.44
04/17/2...	E-pay	Oregon Departmen...	2100 · Payroll Liabil...	0294320-2	3.01	X		45,591.43
04/19/2...	13726	Beautiful Blinds an...	6291 · Facility Expe...	INV #10928	1,054.00	X		44,537.43
04/19/2...	13727	NACD	6160 · Dues and Sub...	2023 Dues - ...	775.00			43,762.43
04/19/2...	13728	Pacific Office Aut...	-split-	Inv # 071798	154.33	X		43,608.10
04/19/2...	13729	Pacific Power	6291 · Facility Expe...	Acct #: 0414...	142.13	X		43,465.97
04/19/2...	13730	Statesman Journal	6177 · Contracted S...	Account#191...	910.72			42,555.25
04/19/2...	13731	Marion County Far...	-split-	Spring 2023 ...	25.00			42,530.25
04/20/2...	E-pay	NW Natural	6291 · Facility Expe...	4107026-9	289.07	X		42,241.18
04/25/2...	E-pay	IRS	-split-	93-0633163 ...	11,062.44	X		31,178.74
04/25/2...	E-pay	Providence Health ...	-split-	105027	841.94	X		30,336.80
04/25/2...	E-pay	Providence Health ...	2100 · Payroll Liabil...	105027	7,912.26	X		22,424.54
04/25/2...			1015 · LGIP Savings	Funds Transfer		X	100,000.00	122,424.54
04/26/2...	13732	Select Impressions	6347 · Public Events...	Cust # 1717 I...	282.00			122,142.54
04/26/2...	13733	Chemeketa Comm...	6347 · Public Events...	CUST ID# K...	100.00			122,042.54

Marion Soil and Water Conservation District

5/26/2023 8:11 AM

Register: 1010 · US Bank Checking  
 From 04/01/2023 through 04/30/2023  
 Sorted by: Date, Type, Number/Ref

<b>Date</b>	<b>Number</b>	<b>Payee</b>	<b>Account</b>	<b>Memo</b>	<b>Payment</b>	<b>C</b>	<b>Deposit</b>	<b>Balance</b>
04/26/2...	13734	Trexler Farm	6347 · Public Events...	Inv. #3965	625.00			121,417.54
04/26/2...	13735	Blank, Chelsea E.L.	-split-	Reimburseme...	340.16			121,077.38
04/27/2...		QuickBooks Payro...	-split-	Created by Pa...	33,380.75	X		87,696.63
04/28/2...	13736	US Bank Credit C...	2013 · US Bank Cre...	Acct # -7585	1,733.00			85,963.63
04/28/2...		Ortiz, Susan T	-split-	Direct Deposit		X		85,963.63
04/28/2...		Blank, Chelsea E.L.	-split-	Direct Deposit		X		85,963.63
04/28/2...		Calkins, Janice L	-split-	Direct Deposit		X		85,963.63
04/28/2...		Hamilton, Sarah C	-split-	Direct Deposit		X		85,963.63
04/28/2...		Keirstead, Heath	-split-	Direct Deposit		X		85,963.63
04/28/2...		Lovett, Linda	-split-	Direct Deposit		X		85,963.63
04/28/2...		Roosth, Rachel K	-split-	Direct Deposit		X		85,963.63
04/28/2...		Sanchez, Brenda E	-split-	Direct Deposit		X		85,963.63
04/28/2...		Wilson, Tom H	-split-	Direct Deposit		X		85,963.63
04/28/2...		Pineda, Rebecca M	-split-	Direct Deposit		X		85,963.63

12:16 PM

05/19/23

# Marion Soil and Water Conservation District Reconciliation Summary

1010 - US Bank Checking, Period Ending 04/28/2023

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	Apr 28, 23
<b>Beginning Balance</b>	62,471.18
<b>Cleared Transactions</b>	
Checks and Payments - 29 items	-71,912.95
Deposits and Credits - 4 items	105,014.04
<b>Total Cleared Transactions</b>	33,101.09
<b>Cleared Balance</b>	<u>95,572.27</u>
<b>Uncleared Transactions</b>	
Checks and Payments - 21 items	-9,608.64
Deposits and Credits - 1 item	0.00
<b>Total Uncleared Transactions</b>	-9,608.64
<b>Register Balance as of 04/28/2023</b>	<u>85,963.63</u>
<b>New Transactions</b>	
Checks and Payments - 30 items	-44,518.38
Deposits and Credits - 2 items	800.00
<b>Total New Transactions</b>	-43,718.38
<b>Ending Balance</b>	<u>42,245.25</u>

**Marion Soil and Water Conservation District**  
**Reconciliation Detail**  
**2013 · US Bank Credit Card - BS, Period Ending 04/27/2023**

Type	Date	Num	Name	Clr	Amount	Balance
<b>Beginning Balance</b>						2,110.66
<b>Cleared Transactions</b>						
<b>Charges and Cash Advances - 17 items</b>						
Credit Card Charge	04/28/2023	8010	Verizon Wireless	X	-596.92	-596.92
Credit Card Charge	04/28/2023	0409	LifeMap Assurance ...	X	-203.86	-800.78
Credit Card Charge	04/28/2023	7259	Evvnt Inc	X	-129.00	-929.78
Credit Card Charge	04/28/2023	0905	Microsoft	X	-118.25	-1,048.03
Credit Card Charge	04/28/2023	1849	MakeStickers	X	-118.19	-1,166.22
Credit Card Charge	04/28/2023	3710	The Events Calendar	X	-99.00	-1,265.22
Credit Card Charge	04/28/2023	7995	Green Economy Me...	X	-99.00	-1,364.22
Credit Card Charge	04/28/2023	1849	MakeStickers	X	-75.70	-1,439.92
Credit Card Charge	04/28/2023	1568	Safeway	X	-55.47	-1,495.39
Credit Card Charge	04/28/2023	4557	Conservation Job Bo...	X	-55.00	-1,550.39
Credit Card Charge	04/28/2023	0512	Zoom	X	-40.00	-1,590.39
Credit Card Charge	04/28/2023	6572	Postmaster - Stayton	X	-37.44	-1,627.83
Credit Card Charge	04/28/2023	0264	Amazon.com	X	-30.97	-1,658.80
Credit Card Charge	04/28/2023	6068	DreamHost	X	-26.99	-1,685.79
Credit Card Charge	04/28/2023	8499	Bauman's Farm and ...	X	-20.00	-1,705.79
Credit Card Charge	04/28/2023	2106	Willamette Valley Pi...	X	-20.00	-1,725.79
Credit Card Charge	04/28/2023	1856	MakeStickers	X	-7.21	-1,733.00
Total Charges and Cash Advances					-1,733.00	-1,733.00
<b>Payments and Credits - 1 item</b>						
Check	04/05/2023	13709	US Bank Credit Card	X	2,110.66	2,110.66
Total Cleared Transactions					377.66	377.66
Cleared Balance					-377.66	1,733.00
Register Balance as of 04/27/2023					-377.66	1,733.00
<b>Ending Balance</b>					<b>-377.66</b>	<b>1,733.00</b>

12:09 PM

05/02/23

**Marion Soil and Water Conservation District**  
**Reconciliation Detail**  
**2012 · US Bank Credit Card - AB, Period Ending 04/27/2023**

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Type	Date	Num	Name	Clr	Amount	Balance
<b>Beginning Balance</b>						102.98
<b>Cleared Transactions</b>						
<b>Payments and Credits - 1 item</b>						
Check	04/05/2023	13708	US Bank Credit Card	X	102.98	102.98
Total Cleared Transactions					102.98	102.98
Cleared Balance					-102.98	0.00
Register Balance as of 04/27/2023					-102.98	0.00
<b>Ending Balance</b>					<b>-102.98</b>	<b>0.00</b>

## Marion Soil and Water Conservation District Reconciliation Detail

1018 · Stripe, Period Ending 04/30/2023

Type	Date	Num	Name	Clr	Amount	Balance
<b>Beginning Balance</b>						738.17
<b>Cleared Transactions</b>						
<b>Checks and Payments - 1 item</b>						
Check	04/14/2023	EFT	US Bank	X	-738.17	-738.17
Total Checks and Payments					-738.17	-738.17
Total Cleared Transactions					-738.17	-738.17
Cleared Balance					-738.17	0.00
Register Balance as of 04/30/2023					-738.17	0.00
<b>Ending Balance</b>					<b>-738.17</b>	<b>0.00</b>



# March 2023 Treasurer's Report **DRAFT** Executive Summary

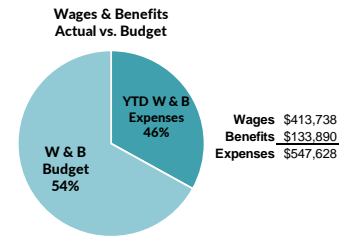
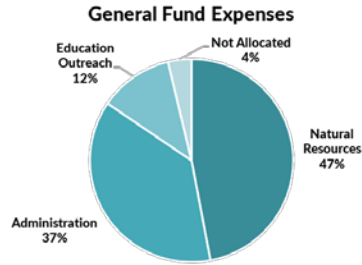
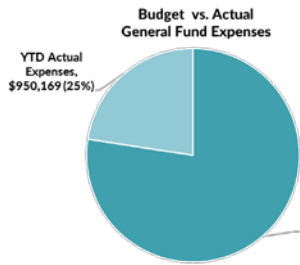
## General Fund Resources March 1: \$2,245,140.11

### General Fund March Income

Income (rent, grants, plant sale)	\$23,682.63
Previous Years Levied Taxes Received	\$1,196.96
Current Year Levied Taxes Received	\$20,200.39
Dividends (Interest)	\$7,819.00
	<b>= \$52,898.59</b>

### Year to Date (YTD) Income

Income (rent, grants, plant sale)	\$167,846.27 (45.9% of Adopted Budget)
Previous Years Levied Taxes Received	\$53,984.94 (199.9%)
Current Year Levied Taxes Received	\$1,300,752.92 (98.1%)
Dividends (Interest)	\$42,369.93 (423.7%)
	<b>= \$1,564,954.06</b>



General Fund Expenses	Administration	Natural Resources	Education	Not Allocated
March Expenses	\$14,404.62	\$42,489.83	\$10,488.27	\$2,318.92
22-23 Adopted Budget	\$869,825.00	\$1,511,610.00	\$266,246.00	\$612,000.00
YTD Expenses	(-) \$356,280.27	(-) \$446,779.70	(-) \$111,678.74	(-) \$35,429.90
YTD Balance	\$513,544.73	\$1,064,830.30	\$154,567.26	\$576,570.10
<b>Conservation Grants</b>	<b>*Budget</b>	<b>YTD Expenses</b>	<b>Balance</b>	
(Natural Resource Program Expense)	\$781,786.00	\$128,281.31	\$653,504.69	

### General Fund Adopted Budget vs. Actual Income & Expenses

General Fund Adopted FY22-23 Budget	\$3,259,680.75
YTD Actual Budget	\$3,202,504.40
YTD Total General Fund Expenses Through March	(-) \$950,168.61
<b>General Fund Resources for April</b>	<b>\$2,252,335.79</b>

Budget Reserves	Multi-Purpose	Building
22-23 Reserves	\$316,271.00	\$262,307.00
Year to Date Resources	\$0.00	\$5,778.49 (12% of LGIP Dividends)
Balance	\$316,271.00	\$268,085.49

### US Bank Checking Account Summary for March

- US Bank Checking Beginning Balance = \$93,579.19
  - Checks Paid = \$26,463.52 (28 checks)
    - Includes Credit Card Expenses = [\$2,110.65]
  - Electronic Withdrawals = \$94,451.25 (19 E-Pay)
- Deposits = \$93,682.63
- US Bank Checking Ending Balance = \$66,347.05



### Account Statement - Transaction Summary

For the Month Ending **March 31, 2023**

**MARION SOIL & WATER CONSERV DIST - MARION SOIL AND WATER CONSERVATION DIST - [REDACTED]**

<b>Oregon LGIP</b>	
Opening Balance	2,781,176.25
Purchases	30,283.59
Redemptions	(70,000.05)
<hr/>	
<b>Closing Balance</b>	<b>\$2,741,459.79</b>
Dividends	8,886.24

<b>Asset Summary</b>		
	<b>March 31, 2023</b>	<b>February 28, 2023</b>
<b>Oregon LGIP</b>	2,741,459.79	2,781,176.25
<b>Total</b>	<b>\$2,741,459.79</b>	<b>\$2,781,176.25</b>





**Account Statement**

For the Month Ending **March 31, 2023**

**MARION SOIL & WATER CONSERV DIST - MARION SOIL AND WATER CONSERVATION DIST**

Trade Date	Settlement Date	Transaction Description	Share or Unit Price	Dollar Amount of Transaction	Balance
<b>Oregon LGIP</b>					
<b>Opening Balance</b>					<b>2,781,176.25</b>
03/01/23	03/01/23	LGIP Fees - ACH Redemption (1 @ \$0.05 - From 4879) - February 2023	1.00	(0.05)	2,781,176.20
03/06/23	03/06/23	Transfer from MARION COUNTY TREASURER - MARION COUNTY	1.00	21,397.35	2,802,573.55
03/28/23	03/28/23	Redemption - ACH Redemption	1.00	(70,000.00)	2,732,573.55
03/31/23	04/03/23	Accrual Income Div Reinvestment - Distributions	1.00	8,886.24	2,741,459.79

**Closing Balance** **2,741,459.79**

	Month of March	Fiscal YTD July-March		
<b>Opening Balance</b>	2,781,176.25	2,084,031.37	<b>Closing Balance</b>	2,741,459.79
<b>Purchases</b>	30,283.59	1,387,428.87	<b>Average Monthly Balance</b>	2,790,376.76
<b>Redemptions</b>	(70,000.05)	(730,000.45)	<b>Monthly Distribution Yield</b>	3.75%
<hr/>				
<b>Closing Balance</b>	<b>2,741,459.79</b>	<b>2,741,459.79</b>		
<b>Dividends</b>	8,886.24	48,148.42		

**Marion Soil and Water Conservation District**  
**Reconciliation Detail**  
 1015 · LGIP Savings, Period Ending 03/31/2023

Type	Date	Num	Name	Clr	Amount	Balance
<b>Beginning Balance</b>						2,781,176.25
<b>Cleared Transactions</b>						
<b>Checks and Payments - 2 items</b>						
Check	03/01/2023			X	-0.05	-0.05
Transfer	03/28/2023			X	-70,000.00	-70,000.05
Total Checks and Payments					-70,000.05	-70,000.05
<b>Deposits and Credits - 2 items</b>						
Deposit	03/06/2023			X	21,397.35	21,397.35
Deposit	03/31/2023			X	8,886.24	30,283.59
Total Deposits and Credits					30,283.59	30,283.59
Total Cleared Transactions					-39,716.46	-39,716.46
Cleared Balance					-39,716.46	2,741,459.79
Register Balance as of 03/31/2023					-39,716.46	2,741,459.79
<b>Ending Balance</b>					<b>-39,716.46</b>	<b>2,741,459.79</b>



P.O. Box 1800  
Saint Paul, Minnesota 55101-0800

3223 IMG 6480 S Y ST01

**Business Statement**

Account Number: [REDACTED]

Statement Period:  
Mar 1, 2023  
through  
Mar 31, 2023

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000067701 00 SP 106481703236241 S  
MARION SOIL & WATER  
CONSERVATION DISTRICT  
PO BOX 537  
STAYTON OR 97383-0537



**To Contact U.S. Bank**

**Commercial Customer**

**Service:** 877-295-2509

**U.S. Bank accepts Relay Calls**

**Internet:** [usbank.com](http://usbank.com)

**INFORMATION YOU SHOULD KNOW**

Thank you for choosing U.S. Bank. We're committed to keeping you up to date on your account and would like to remind you of an upcoming change to our *Night Deposit Agreement*, effective April 14, 2023. If you utilize the night drop service, you may review the revised *Night Depository Service Standard Terms and Conditions* online at [usbank.com](http://usbank.com), request a copy by calling 800-USBANKS (872-2657), or obtain a copy by visiting your local U.S. Bank branch. By continuing to use our night deposit services after April 14, 2023, you accept and agree to these updated terms. If you have any questions, please call us at U.S. Bank 24-Hour Banking at 800-USBANKS (872-2657).

**PREMIUM BUSINESS CHECKING**

**Member FDIC**

U.S. Bank National Association

Account Number [REDACTED]

**Account Summary**

	# Items		
Beginning Balance on Mar 1		\$	93,579.19
Customer Deposits	2		1,114.00
Other Deposits	2		92,568.63
Other Withdrawals	19		94,451.25-
Checks Paid	28		26,463.52-
<b>Ending Balance on Mar 31, 2023</b>		<b>\$</b>	<b>66,347.05</b>

**Customer Deposits**

Number	Date	Ref Number	Amount	Number	Date	Ref Number	Amount
	Mar 8	8614514064	1,104.00		Mar 15	8614039277	10.00
<b>Total Customer Deposits</b>							<b>\$ 1,114.00</b>

**Other Deposits**

Date	Description of Transaction	Ref Number	Amount
Mar 3	Electronic Deposit From WATERSHED ENH BD REF=230610128887350N00	9569199901PAYMENT 1930633163 000	\$ 22,568.63
Mar 28	Electronic Deposit From OREGON ST TREAS REF=230860202787960Y00	9400817099LGIP ACH 3683633	70,000.00
<b>Total Other Deposits</b>			<b>\$ 92,568.63</b>

**Other Withdrawals**

Date	Description of Transaction	Ref Number	Amount
Mar 1	Electronic Withdrawal To STRIPE REF=230590170702760N00	1800948598TRANSFER ST-H5I8U2S3V5B1	\$ 150.86-
Mar 1	Electronic Withdrawal To Health Plan REF=230590184742740Y00	E930989307ODS Ins ODSINS002868500	893.78-
Mar 2	Electronic Withdrawal To STRIPE REF=230600127885730N00	1800948598TRANSFER ST-O8Y0T6E3X0R3	41.88-
Mar 2	Electronic Withdrawal To NATIONWIDE REF=230600157386960N00	9000190073PAYMENTS DCD0009265290	408.53-
Mar 2	Electronic Withdrawal To NATIONWIDE REF=230600157386860N00	9000190073PAYMENTS DCD0009264987	1,016.06-
Mar 2	Electronic Withdrawal To NATIONWIDE REF=230600157386950N00	9000190073PAYMENTS DCD0009265289	1,788.13-



MARION SOIL & WATER  
 CONSERVATION DISTRICT  
 PO BOX 537  
 STAYTON OR 97383-0537

Account Number: [REDACTED]

Statement Period:  
 Mar 1, 2023  
 through  
 Mar 31, 2023



**PREMIUM BUSINESS CHECKING**

**(CONTINUED)**

U.S. Bank National Association

Account Number [REDACTED]

**Other Withdrawals (continued)**

Date	Description of Transaction	Ref Number	Amount
Mar 2	Electronic Withdrawal REF=230600142656290Y00	To Providence Healt M930863097PH COM GRPPRVGRP003119661	10,149.30-
Mar 3	Electronic Withdrawal REF=230610155122880N00	To STRIPE 4270465600TRANSFER ST-J2S6T6A8G8S0	48.86-
Mar 3	Electronic Withdrawal REF=230610128890290N00	To OR REVENUE DEPT 9302015091TAXPAYMENT454390912	3,994.70-
Mar 3	Electronic Withdrawal REF=230610114360230N00	To IRS 3387702000USATAXPYMT225346205948575	11,505.38-
Mar 14	Analysis Service Charge	1400000000	84.13-
Mar 29	Electronic Withdrawal REF=230870126066010Y00	To Health Plan E930989307ODS Ins ODSINS002896079	484.73-
Mar 29	Electronic Withdrawal REF=230870150011040Y00	To COMMERCIAL GROUP M930863097WEB PYMNT 538338118	8,754.20-
Mar 30	Electronic Withdrawal REF=230880175234700N00	To NATIONWIDE 9000190073PAYMENTS DCD0009376105	1,205.25-
Mar 30	Electronic Withdrawal REF=230880127491170N00	To OR REVENUE DEPT 9302015091TAXPAYMENT219925632	4,118.98-
Mar 30	Electronic Withdrawal REF=230880174744310N00	To INTUIT PAYROLL S 1722616679QUICKBOOKS930633163	35,638.31-
Mar 31	Electronic Withdrawal REF=230890168876460N00	To NATIONWIDE 9000190073PAYMENTS DCD0009379582	408.53-
Mar 31	Electronic Withdrawal REF=230890168876450N00	To NATIONWIDE 9000190073PAYMENTS DCD0009379581	1,843.70-
Mar 31	Electronic Withdrawal REF=230890113806200N00	To IRS 3387702000USATAXPYMT225349005830819	11,915.94-
<b>Total Other Withdrawals</b>			<b>\$ 94,451.25-</b>

**Checks Presented Conventionally**

Check	Date	Ref Number	Amount	Check	Date	Ref Number	Amount
13648	Mar 8	8614825617	3,814.20	13690	Mar 13	8016754656	265.00
13657*	Mar 7	8316382059	500.00	13691	Mar 14	8315930594	74.54
13667*	Mar 1	8614647031	189.00	13692	Mar 17	9214499596	205.67
13677*	Mar 2	8911330639	1,187.75	13694*	Mar 17	9214162430	1,500.00
13678	Mar 2	8914395151	75.00	13695	Mar 24	9214295500	7,113.88
13679	Mar 8	8614779799	77.69	13696	Mar 24	9214265271	20.14
13682*	Mar 16	8913545575	5,516.48	13697	Mar 22	8614253328	519.00
13683	Mar 20	8016779344	260.00	13698	Mar 21	8314528314	178.08
13684	Mar 20	8016762239	160.97	13699	Mar 20	8016665731	30.00
13685	Mar 14	8314730949	120.42	13700	Mar 27	8012956419	234.49
13686	Mar 13	8016901719	395.30	13701	Mar 27	8015845932	220.00
13687	Mar 23	8913786500	46.72	13702	Mar 31	9211247329	255.00
13688	Mar 14	8316040882	99.95	13703	Mar 28	8315623070	101.89
13689	Mar 27	8011930264	3,165.20	13704	Mar 28	8315238161	137.15

\* Gap in check sequence

**Conventional Checks Paid (28) \$ 26,463.52-**

**Balance Summary**

Date	Ending Balance	Date	Ending Balance	Date	Ending Balance
Mar 1	92,345.55	Mar 14	80,371.36	Mar 22	72,011.16
Mar 2	77,678.90	Mar 15	80,381.36	Mar 23	71,964.44
Mar 3	84,698.59	Mar 16	74,864.88	Mar 24	64,830.42
Mar 7	84,198.59	Mar 17	73,159.21	Mar 27	61,210.73
Mar 8	81,410.70	Mar 20	72,708.24	Mar 28	130,971.69
Mar 13	80,750.40	Mar 21	72,530.16	Mar 29	121,732.76



MARION SOIL & WATER  
CONSERVATION DISTRICT  
PO BOX 537  
STAYTON OR 97383-0537

**Business Statement**

Account Number:

[REDACTED]

Statement Period:

Mar 1, 2023

through

Mar 31, 2023

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**PREMIUM BUSINESS CHECKING**

**(CONTINUED)**

U.S. Bank National Association

Account Number [REDACTED]

**Balance Summary (continued)**

<i>Date</i>	<i>Ending Balance</i>	<i>Date</i>	<i>Ending Balance</i>
Mar 30	80,770.22	Mar 31	66,347.05

Balances only appear for days reflecting change.

Marion Soil and Water Conservation District

4/17/2023 1:38 PM

Register: 1010 · US Bank Checking

From 03/01/2023 through 03/31/2023

Sorted by: Date, Type, Number/Ref

Date	Number	Payee	Account	Memo	Payment C	Deposit	Balance
03/01/2...	Credit C...	LifeMap Assuranc...	2100 · Payroll Liabil...	GR0033282	165.18		83,773.61
03/01/2...	E-pay	Providence Health ...	2100 · Payroll Liabil...	105027 Febru...	9,070.19		74,703.42
03/01/2...	E-pay	Oregon Departmen...	2100 · Payroll Liabil...	0294320-2	3,129.00		71,574.42
03/01/2...	E-pay	Oregon Departmen...	-split-	0294320-2 Fe...	865.70		70,708.72
03/01/2...	E-pay	Nationwide Retire...	2100 · Payroll Liabil...	#0036394002...	1,016.06		69,692.66
03/01/2...	E-pay	Nationwide Retire...	2100 · Payroll Liabil...	#0036394001	1,038.06		68,654.60
03/01/2...	E-pay	Nationwide Retire...	2100 · Payroll Liabil...	#0036394001...	750.07		67,904.53
03/01/2...	E-pay	Nationwide Retire...	2100 · Payroll Liabil...	Plan #003639...	408.53		67,496.00
03/01/2...	E-pay	Moda Health	2100 · Payroll Liabil...	Group 10006...	724.40		66,771.60
03/01/2...	E-pay	IRS	-split-	93-0633163 ...	11,505.38		55,266.22
03/01/2...	13682	US Bank Credit C...	2013 · US Bank Cre...	Acct # -7585	5,516.48		49,749.74
03/01/2...	13683	Creekside Landsca...	6291 · Facility Expe...	INV #27560 ...	260.00		49,489.74
03/01/2...	13684	Pacific Office Aut...	6177 · Contracted S...	Inv #3S0577...	160.97		49,328.77
03/01/2...			1018 · Stripe	Funds Transfer	41.88		49,286.89
03/03/2...			1018 · Stripe	Funds Transfer	48.86		49,238.03
03/08/2...			-split-	Deposit		1,104.00	50,342.03
03/08/2...	13685	City of Stayton - w...	-split-	Acct #7.154....	120.42		50,221.61
03/08/2...	13686	Garten Services	6291 · Facility Expe...	INV011574	395.30		49,826.31
03/08/2...	13687	Republic Services	6291 · Facility Expe...	Account #3-0...	46.72		49,779.59
03/08/2...	13688	SCTC	6290 · Communicati...	Account #: 2...	99.95		49,679.64
03/08/2...	13689	Sevenoaks Native ...	6551 · Nursery Supp...	Inv. #11181 -...	3,165.20		46,514.44
03/08/2...	13690	Heritage Seedlings...	6551 · Nursery Supp...	Inv #59631	265.00		46,249.44
03/08/2...	13691	Willamette Garden...	6551 · Nursery Supp...	Native plants ...	74.54		46,174.90
03/08/2...	13692	Blank, Chelsea E.L.	-split-	Mileage for ...	205.67		45,969.23
03/08/2...	13693	Roosth, Rachel K	6350 · TRAVEL & ...	Mileage for T...	75.98		45,893.25
03/08/2...	13694	Cogent IT	6275 · Computer Sy...	INV #13565	1,500.00		44,393.25
03/15/2...			4160 · Native Plant ...	Deposit		10.00	44,403.25
03/15/2...	13695	Champoeg Nursery...	6551 · Nursery Supp...	INV #5999	7,113.88		37,289.37
03/15/2...	13696	Cogent IT	6177 · Contracted S...	INV #13666	20.14		37,269.23
03/15/2...	13697	Walter E Nelson Co.	6551 · Nursery Supp...	90450 Inv. #1...	519.00		36,750.23
03/15/2...	13698	Security Alarm Co...	6291 · Facility Expe...	Customaer # ...	178.08		36,572.15
03/15/2...	13699	Garten Services	6177 · Contracted S...	INV011690	30.00		36,542.15
03/15/2...	13700	Statesman Journal	6023 · Annual Meeti...	Account#191...	234.49		36,307.66
03/22/2...	13701	Abide Web Design...	6177 · Contracted S...	INV #2095	220.00		36,087.66
03/22/2...	13702	Jenny Brausch Bus...	6177 · Contracted S...	INV#2382	255.00		35,832.66
03/22/2...	13703	Pacific Office Aut...	-split-	Inv # 998519	101.89		35,730.77

Marion Soil and Water Conservation District

4/17/2023 1:38 PM

Register: 1010 · US Bank Checking

From 03/01/2023 through 03/31/2023

Sorted by: Date, Type, Number/Ref

<u>Date</u>	<u>Number</u>	<u>Payee</u>	<u>Account</u>	<u>Memo</u>	<u>Payment</u>	<u>C</u>	<u>Deposit</u>	<u>Balance</u>
03/22/2...	13704	Pacific Power	6291 · Facility Expe...	Acct #: 0414...	137.15			35,593.62
03/27/2...	E-pay	IRS	-split-	93-0633163 ...	11,915.94			23,677.68
03/27/2...	E-pay	Providence Health ...	2100 · Payroll Liabil...	105027 April ...	841.94			22,835.74
03/27/2...	E-pay	Providence Health ...	2100 · Payroll Liabil...	105027 April ...	7,912.26			14,923.48
03/28/2...	Credit C...	Moda Health	2100 · Payroll Liabil...	Group 10006...				14,923.48
03/28/2...	E-pay	Nationwide Retire...	2100 · Payroll Liabil...	Plan #003639...	408.53			14,514.95
03/28/2...	E-pay	Nationwide Retire...	2100 · Payroll Liabil...	#0036394001	1,069.29			13,445.66
03/28/2...	E-pay	Nationwide Retire...	2100 · Payroll Liabil...	#0036394001	774.41			12,671.25
03/28/2...	E-pay	Nationwide Retire...	2100 · Payroll Liabil...	#0036394002	1,205.25			11,466.00
03/28/2...	E-pay	Moda Health	2100 · Payroll Liabil...	10006871 001	98.94			11,367.06
03/28/2...	E-pay	Moda Health	-split-	Group 10006...	484.73			10,882.33
03/28/2...	E-pay	Oregon Departmen...	2100 · Payroll Liabil...	0294320-2	3,222.00			7,660.33
03/28/2...	E-pay	Oregon Departmen...	-split-	0294320-2	896.98			6,763.35
03/28/2...	E-pay	Oregon Departmen...	2100 · Payroll Liabil...	0294320-2	47.74			6,715.61
03/28/2...	E-pay	Providence Health ...	2100 · Payroll Liabil...	105027	1,079.11			5,636.50
03/28/2...			1015 · LGIP Savings	LGIP Funds ...			70,000.00	75,636.50
03/30/2...		QuickBooks Payro...	-split-	Created by Pa...	35,638.31			39,998.19
03/31/2...	13705	City of Salem	-split-	LAP Grant #...	7,500.00			32,498.19
03/31/2...	13706	Marion County 4-...	-split-	Outdoor Expl...	2,000.00			30,498.19
03/31/2...	13707	Hubbell Farms	-split-	30-23-003 Co...	2,295.00			28,203.19
03/31/2...		Blank, Chelsea E.L.	-split-	Direct Deposit		X		28,203.19
03/31/2...		Calkins, Janice L	-split-	Direct Deposit		X		28,203.19
03/31/2...		Hamilton, Sarah C	-split-	Direct Deposit		X		28,203.19
03/31/2...		Keirstead, Heath	-split-	Direct Deposit		X		28,203.19
03/31/2...		Lovett, Linda	-split-	Direct Deposit		X		28,203.19
03/31/2...		Ortiz, Susan T	-split-	Direct Deposit		X		28,203.19
03/31/2...		Pineda, Rebecca M	-split-	Direct Deposit		X		28,203.19
03/31/2...		Roosth, Rachel K	-split-	Direct Deposit		X		28,203.19
03/31/2...		Sanchez, Brenda E	-split-	Direct Deposit		X		28,203.19
03/31/2...		Wilson, Tom H	-split-	Direct Deposit		X		28,203.19

**Marion Soil and Water Conservation District**  
**Reconciliation Summary**  
1010 · US Bank Checking, Period Ending 03/31/2023

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	Mar 31, 23
Beginning Balance	93,579.19
Cleared Transactions	
Checks and Payments - 56 items	-121,691.28
Deposits and Credits - 17 items	94,459.14
Total Cleared Transactions	-27,232.14
Cleared Balance	<u>66,347.05</u>
Uncleared Transactions	
Checks and Payments - 13 items	-15,369.85
Deposits and Credits - 1 item	0.00
Total Uncleared Transactions	-15,369.85
Register Balance as of 03/31/2023	<u>50,977.20</u>
New Transactions	
Checks and Payments - 51 items	-87,948.82
Deposits and Credits - 3 items	101,138.17
Total New Transactions	13,189.35
Ending Balance	<u><u>64,166.55</u></u>



1:20 PM

04/05/23

**Marion Soil and Water Conservation District**  
**Reconciliation Detail**  
**2013 · US Bank Credit Card - BS, Period Ending 03/27/2023**

Type	Date	Num	Name	Clr	Amount	Balance
<b>Beginning Balance</b>						5,516.48
<b>Cleared Transactions</b>						
<b>Charges and Cash Advances - 15 items</b>						
Credit Card Charge	04/04/2023	7984	Verizon Wireless	X	-585.32	-585.32
Credit Card Charge	04/04/2023	8172	NW Natural	X	-370.91	-956.23
Credit Card Charge	04/04/2023	9643	OSU Extension Serv...	X	-300.00	-1,256.23
Credit Card Charge	04/04/2023	1780	NW Natural	X	-295.11	-1,551.34
Credit Card Charge	04/04/2023	9882	Eventbrite	X	-150.00	-1,701.34
Credit Card Charge	04/04/2023	6169	Canva	X	-119.99	-1,821.33
Credit Card Charge	04/04/2023	8852	Microsoft	X	-105.00	-1,926.33
Credit Card Charge	04/04/2023	4295	OSU Extension Serv...	X	-80.00	-2,006.33
Credit Card Charge	04/04/2023	3821	Eventbrite	X	-70.00	-2,076.33
Credit Card Charge	04/04/2023	6353	Zoom	X	-40.00	-2,116.33
Credit Card Charge	04/04/2023	5558	DreamHost	X	-26.99	-2,143.32
Credit Card Charge	04/04/2023	4634	Eventbrite	X	-25.00	-2,168.32
Credit Card Charge	04/04/2023	4439	Calendly	X	-15.00	-2,183.32
Credit Card Charge	04/05/2023	2688	LifeMap Assurance ...	X	-165.18	-2,348.50
Credit Card Charge	04/05/2023	7180	Safeway	X	-53.12	-2,401.62
<b>Total Charges and Cash Advances</b>					<b>-2,401.62</b>	<b>-2,401.62</b>
<b>Payments and Credits - 2 items</b>						
Check	03/01/2023	13682	US Bank Credit Card	X	5,516.48	5,516.48
Credit Card Credit	04/04/2023	2992	DocuSign Inc.	X	290.96	5,807.44
<b>Total Cleared Transactions</b>					<b>3,405.82</b>	<b>3,405.82</b>
<b>Cleared Balance</b>					<b>-3,405.82</b>	<b>2,110.66</b>
<b>Register Balance as of 03/27/2023</b>					<b>-3,405.82</b>	<b>2,110.66</b>
<b>Ending Balance</b>					<b>-3,405.82</b>	<b>2,110.66</b>

**Marion Soil and Water Conservation District**  
**Reconciliation Detail**  
**1018 · Stripe, Period Ending 03/31/2023**

Type	Date	Num	Name	Clr	Amount	Balance
<b>Beginning Balance</b>						-41.88
<b>Cleared Transactions</b>						
<b>Checks and Payments - 6 items</b>						
Check	03/01/2023	EFT	Native Plant & Tree ...	X	-48.86	-48.86
Check	03/02/2023	EFT	Native Plant & Tree ...	X	-96.74	-145.60
Check	03/03/2023	EFT	Native Plant & Tree ...	X	-30.36	-175.96
Check	03/04/2023	EFT	Native Plant & Tree ...	X	-177.56	-353.52
Check	03/07/2023	EFT	Native Plant & Tree ...	X	-37.93	-391.45
Check	03/25/2023	EFT	Native Plant & Tree ...	X	-25.43	-416.88
Total Checks and Payments					-416.88	-416.88
<b>Deposits and Credits - 6 items</b>						
Deposit	03/01/2023			X	41.88	41.88
Deposit	03/02/2023			X	68.04	109.92
Deposit	03/03/2023			X	48.86	158.78
Deposit	03/03/2023			X	763.15	921.93
Deposit	03/04/2023			X	260.21	1,182.14
Deposit	03/06/2023			X	14.79	1,196.93
Total Deposits and Credits					1,196.93	1,196.93
Total Cleared Transactions					780.05	780.05
Cleared Balance					780.05	738.17
Register Balance as of 03/31/2023					780.05	738.17
<b>Ending Balance</b>					<b>780.05</b>	<b>738.17</b>



**Marion Soil and Water Conservation District**  
**Board of Directors April 4, 2023, Meeting Minutes DRAFT 2**  
6:31 PM to 8:43 PM  
Facilitator: Secretary-Treasurer Dave Budeau  
Recorded by: Brenda Sanchez

<b>Directors &amp; Record of Attendance</b>		<b>Associate Directors</b>
At Large 1-Peggy Hart	Present	Mark Fields
At Large 2-Scott Walker	Present	Leland Hardy
Zone 1-Vacant	Vacant	Angela Plowhead
Zone 2-Vacant	Vacant	
Zone 3-Darin Olson (Chair)	Absent	
Zone 4-Dave Budeau (Secretary-Treasurer)	Present	
Zone 5-Rochelle Koch (Vice-Chair)	Present	
<b>Staff</b>		<b>Guests</b>
Brenda Sanchez		Les Bachelor
Heath Keirstead		Brandin Hilbrant
Linda Lovett		Rich Rodriguez
Becky Pineda		Kathy Patterson
		Lindsey McClary

**Note:** All documents and materials displayed or referenced are retained in the Board of Directors Meeting file at the Marion Soil and Water Conservation District (Marion SWCD or District).

**A. Budeau Call to Order: 6:31 PM**

- Bachelor, Natural Resources Conservation Service (NRCS)
- Hilbrant, North Santiam Watershed Council (NSWC)
- McClary, Confederated Tribes of Grand Ronde (CTGR)
- Rodriguez and Patterson, public

**B. Announcements** - Darin Olson-Chair is not attending tonight. Dave Budeau will facilitate the meeting with Rochelle Koch.

**C. Agenda Additions or Changes**

- Agenda addition: Walker adds update to policies proposal
- Agenda change: COLA is moved to the May 2023 meeting, because the Chair (absent) would like to be included in the discussion.

**1. Public Comment** - None

## 2. District Snapshot

Sanchez starts by saying that to bridge staff with the Board, that she has asked the Chair to have on the agenda time during District Snapshot to have two employees to share highlights of their work. Staff now submit monthly reports to the District Manager. They are compiled and shared in the SharePoint board file. Sanchez adds that she will use the reports to put together the District Snapshot and every other month two staff will attend the board meeting during District Snapshot and provide highlights of the work they do; starting this month. Heath Keirstead (Communication and Education Specialist) and Becky Pineda (Agricultural Conservation Planner) presented highlights of their work.

Koch requests that staff reports are sent via email when available.

Keirstead highlights:

- Website launch and new features of website. Accessibility feature added for different options to make it more accessible for an individual with disabilities. Blog features.
- Native Tree and Plant Sale March 3 and 4, 2023. Added a new platform through the website's plant database. We offered 109 different species and sold 5,243 plants; 244 customers plus walk ups at sale.
  - Walker suggests we track staff time on plant sale to understand better the costs of the plant sale overall.
  - There was a discussion related to scholarship distribution and that it will be an agenda item at the next education committee meeting.

Chat Comment: Hilbrant- These new website features are great!

Pineda highlights:

- Discussed how she is working on outreach to rural communities.
- Provided technical assistance on Conservation Assistant Grants deadline April 6. There is a more diverse set of projects applying (8 clients).
- Oregon Department of agriculture programs. Strategic Implementation Areas Open House scheduled for April 24, 2023. SIA monitoring plan, starting this fall. ODA grant application is due in May for the 23-25 Capacity and ag water quality program. Pesticide Stewardship Partnership sampling begins April. The new planner will take on the PSP once hired.
- Education and outreach tasks hosting First Friday and Conservation Club series.
- Completed the Succession Planning workshop yesterday (4/4/23) with partners (Clackamas and Polk SWCDs, Marion County Farm Bureau, OSU Mid-Willamette Small Farmers, Oregon Agricultural Trust) Geared to ag landowners; Goal was 30 actual was 26 attendees.

- Been attending grower meetings for outreach.
- ACE Agriculture Conservation Education manure cover tarps -keep it covered campaign.

### 3. Treasurers Report January 2023

Budeau began by stating that Koch had noticed that the check reconciliation detail was not included in the report and that Sanchez emailed a copy of the check reconciliation to Directors this week. Hart asked what “Stripe” is, she was not aware of what Stripe is. Keirstead replied that is the application used for processing the sales of plants online. Walker is moving the Treasurers Report until next month because he was not able to review the check reconciliation detail. Next Board meeting will have the January, February, and March Treasurers Report to review.

Chat Comment: Rodriguez-Excellent financial summary and additive net revenues.

### 4. United States Department of Agriculture (USDA) Services

Bachelor begins with staff changes. Civil Rights checklist? Sanchez replies that Koch still needs to sign the checklist and commits to completing and getting it back to Bachelor as soon as possible. The Local Working Group meeting went well. Basin-wide IRA out in 2024 and the CIS budget may double, most headed to forestry. Done contracting first batch of EQIP. Start ranking after deadline 34 applications. Technical Service Providers’ funds are \$64,000, we now have a new engineer. Directors replied that Bachelor put on a good meeting, very informative and then finished with discussion on USDA programs.

### 5. Review of March 1, 2023, Board Meeting Minutes

Budeau starts by saying that he reviewed the minutes. The minutes that were in the Board packet are without Budeau edits. Sanchez displays the March 1, 2023, Board Meeting minutes tracked with Budeau’s edits and comments for Directors to review. Light discussion ensued regarding the edits.

**Action:** Hart motioned for the Board to **approve the March 1 Board Meeting Minutes**, 2<sup>nd</sup> by Koch. No further discussion. MOTION PASSED (unanimously: Aye-4 (Walker, Koch, Hart, and Budeau), Opposed-0).

### 6. 2023-2024 Budget Update

Sanchez begins by stating that she has decided to continue the FY 23-24 budget in its current format. After much thought and discussion felt that the initially proposed “unified” format had its usefulness but an objective of Local Budget Law

is to have a consistent established process and since this format was introduced just two years ago, it is best to continue in this format and revise parts as needed to streamline and create a budget that works. Also, the Budget Committee electors have been engaged in this format and changing it could make it difficult to get the budget approved, especially with a new manager. Sanchez recommends that because we have a large carryover, more than last year, abolishing the Multipurpose Reserve Fund would not benefit the budget and it would be best to leave it as a Reserve.

Sanchez presents the draft proposed budget and reviews the differences between the current and proposed budget. Sanchez points out two major differences. One is in Natural Resources (page 10 of Proposed Budget), under Conservation Grants (line 9) there are now two lines (instead of one in current budget) for Conservation projects (line 12) and Special Projects Grants (line 16) and Conservation projects are funds carried over and can be used for fund requests outside of the District's granting program. The other difference is in the Not Allocated expenses where there is a new line item for Partner Grants (page 11, line 21, \$255,000), which is a proposed grant program for partners to apply for funds from the District for capacity, education, and outreach, technical assistance, or project implementation. The program is still under development but is another source of funds for the public.

Hart asks why the large carry over and Sanchez explains we only spent a portion of the budget for personnel, underestimated carry over from previous budget, streamlining costs, the discontinuation of the Waterflow Program, allocation of ODA budgets, facility expenses less than anticipated. Sanchez said after reallocating the budget for FY 23-24 there was over a million dollars still to be appropriated.

Discussion continued regarding the Partner Grant details. Sanchez adds that the Partner Grant framework is on the Natural Resources Committee agenda for discussion.

Walker adds that he would like to add more money to the Building Reserve Fund. Sanchez adds she thinks that the current Building Reserve would cover ADA cost and says it is up to the Board to make these decisions. Walker then says he would like \$50,000 added to the Building Reserve in anticipation of higher costs.

Walker would also like to see a line item added to Not Allocated for New Programs at \$10,000. Sanchez confirms she will do this.

Discussion then began over the “Not Allocated” term and whether that should be changed because it is misleading and confusing. Sanchez says that we use the state forms, and if we have the information required, we could use whatever format we want, so maybe we can change the title.

Discussion then changed to whether the Board needs to make a motion to add \$50,000 to the Building Reserve. It was determined this is a new budget and we can allocate where we need to.

Plowhead, points out we could be overly concerned and asks for clarification regarding the process for changing the budget after the budget committee approves. Walker reviews the process.

Budeau summarizes the Directors’ feedback and next steps.

Budeau raises the question regarding abolishing the Multipurpose Reserve Fund. Sanchez states they at least need to review the fund this year and decide if they want to abolish it. Directors discussed options.

Sanchez says she forgot to point out that she added \$175,000 to unappropriated funds (page 11, line 32) because the current \$200,000 would not be enough operating funds to cover the District for three months.

**Walker moves to abolish the Multipurpose Reserve Fund. No second. Motion dies.**

- 7. Request for Extension Letter - NSWC - ODA Weed Board Grant for Ludwigia**  
Hilbrant (NSWC) is requesting an extension of the ODA Weed Board Grant technical assistance matching funds for their aquatic invasive grant. NSWC was given an extension by Oregon Watershed Enhancement Board till the end of the year to complete. NSWC went through some staff challenges and needed the extension. Hilbrant is here to request an extension from the District for the matching funds. Grant includes control for yellow flag iris and ludwigia.

**Action:** Walker motioned for the Board **to extend the NSWC match funds for \$7,889 for aquatic invasive control grant, 2<sup>nd</sup>** by Hart. No further discussion. MOTION PASSED (unanimously: Aye-4 (Walker, Koch, Hart, and Budeau), Opposed-0).

## **8. Letter of Support Requests**

### **a) Mid-Willamette Beaver Partnership**

Hilbrant is also here to request a letter of support (LOS) on behalf of Mary's River, Luckiamute, Ash Creek, North and South Santiam and the Calapoolia waterways; these are tributaries to the Mid-Willamette River. Submitting an ODA ag water quality grant to provide technical assistance for support and partnership. They are using a beaver assessment model by Utah State University that will integrate past data with assessments to be completed this summer. Request of the District includes a letter of support and staff time to review the beaver management plans once a year.

**Action:** Walker motioned for the Board to **approve a staff time and a letter of support for the Mid-Willamette Beaver Partnership**, 2<sup>nd</sup> by Hart. Koch raised her hand for discussion asking if there was staff time to complete. Sanchez agreed there is time. No further discussion. MOTION PASSED (unanimously: Aye-4 (Walker, Koch, Hart, and Budeau), Opposed-0).

**b) Chahalpam Reforestation**

McClary (CTGR) HRE is here to request a letter of support for an ongoing project that the District has been in support of. There are two properties on the North Santiam River; a total of 400 acres. They are going to submit another grant to Bonneville Power Administration to continue reforestation at the Chahalpam site. The District has provided a LOS for an OWEB grant last summer that they did not receive and are now trying for this grant to complete the project. If awarded, the project would reforest 46.5 acres; CTGR is just seeking a LOS. CTGR has been an active Partner with the District. Directors discussed a few details of the project regarding plant acquisition and District commitment.

**Action:** Walker motioned for the Board to **approve a letter of support for the Chahalpam Reforestation Project**, 2<sup>nd</sup> by Hart. Hardy opens discussion by stating the letter mentions the LAP not Conservation Assistance Grants. The letter refers to District awards previously awarded as a LAP. Sanchez says she can add in the new grant name. No further discussion. MOTION PASSED (unanimously: Aye-4 (Walker, Koch, Hart, and Budeau), Opposed-0).

**9. New Employee Introductory Period Completed**

Sanchez states that Linda Lovett has completed her six-month introductory period and Sanchez completed her performance evaluation and she exceeded. Sanchez recommends that the Board approve Lovett as a full-time regular employee of the District.



**Action:** Walker motioned for the Board to **approve Linda Lovett as a permanent employee of the Marion SWCD, 2<sup>nd</sup>** by Budeau. No further discussion. MOTION PASSED (Aye-4 (Walker, Koch, Hart, and Budeau), Opposed-0).

## **10. Proposed Cost of Living Adjustment**

Moved to May 3, Board Meeting agenda.

## **11. Grant Limitations Policy**

Sanchez explains that the District's Grant Limitation Policy needs revision because we changed from LAP to CAG and added the Salmon Watch component and at the last Board meeting Directors requested more information as to why Salmon watch is listed as a grant and to move this to the April 5 Board meeting.

Sanchez explained that she discussed it with the tech team, and it was decided to have Salmon Watch as an indented bullet on the policy under CLEAR Grant to signify it is a component of the CLEAR Grant and not a separate grant. Sanchez displays the written policy with Salmon Watch as an indented bullet under CLEAR Grants.

**Action:** Koch motioned for the Board to **approve the revision to the Grant Limitation Policy, 2<sup>nd</sup>** by Budeau. Walker voices his concern regarding large projects and the \$45,000. No further discussion. MOTION FAILS (Aye-3 (Koch, Hart, and Budeau), Opposed-1(Walker)).

Discussion followed regarding the number of votes needed for a motion to die when there is only a quorum present.

## **12. Policy Regarding Grants to Employees/Board**

Walker opens the discussion regarding first degree relatives of staff or Board members, associates will have to declare a conflict of interest and cannot apply for District grants. Walker would like to be clear about this and create a policy as written and submitted to the Board. Hart and Budeau raised concerns regarding community relationships and the potential to prevent individuals from running for a Director position. Directors continued debate the concerns related to the proposed policy

**Action:** Walker motioned for the Board to **approve a policy that restricts relatives from receiving grants from the District, 2<sup>nd</sup>** by Hart. Koch opens discussion by stating she does not support the policy. Plowhead adds that individuals on commissions and boards often vote against each other and this is not a good argument for this new policy. Hart adds she does not agree with the

policy. Plowhead asks is there a current policy. Walker adds well yes, state law has a conflict-of-interest rule. Sanchez asked Walker to clarify what problem he is trying to solve. Walker responds that he has always felt that relatives should not receive grants. Sanchez asks if she had individuals sign a form when there is a conflict of interest to have on file, will that be, OK? Hart adds that the Board can decide to not approve any grant award and we are not susceptible to this form of corruption. No further discussion. MOTION FAILS (Aye-1 (Walker) Opposed-3 (Koch, Hart, and Budeau)).

### **13. Conservation Assistance Grants (CAG-FKA LAP)**

#### **a) Grants Completed**

Staff created a slideshow of completed projects for Directors to review. Presentation on file.

#### **b) Extension Requests**

Extension requested due to the unavailability of plants. Hart asks if the District can assist with getting plants for projects? Keirstead replies we do provide a list of native plant nurseries. Pineda adds that we have the Plants for Grants program where we will be able to purchase plants as a bulk order for CAG grant recipients. Program is coming soon and still needs the details to be worked out.

**Action:** Walker motioned for the Board to **approve the extension for the Invasive to Native Wildlife Habit LAP-20-22-021**, 2<sup>nd</sup> by Koch. No further discussion. MOTION PASSED (unanimously: Aye-4 (Walker, Koch, Hart, and Budeau), Opposed-0).

Budeau asks Walker to share his thoughts regarding District policies. Walker states that everyone is not familiar with all District policies. He would like to see short summaries of each policy and discuss where policy updates are needed. Directors agreed. Sanchez adds that she has Tom Wilson (staff) creating a booklet with all our policies and she will get that to the board soon.

**Adjourn:** Secretary-Treasurer Budeau adjourned the meeting at 8:43 PM



Marion Soil and Water Conservation District complies with the American with Disabilities Act (ADA) and does not discriminate based on race, color, national origin, gender, religion, age, disability, political beliefs, sexual orientation, and marital or family status. If special physical, language, or other accommodations are needed for this meeting, please contact the District Manager at 503-391-9927 as soon as possible, and at least 48 hours in advance of the meeting.



**Marion Soil and Water Conservation District**  
**Board of Directors May 3, 2023, Meeting Minutes DRAFT**  
 6:30 PM to 8:38 PM  
 Facilitator: Chair Olson  
 Recorded by: Brenda Sanchez

<b>Directors &amp; Record of Attendance</b>		<b>Associate Directors</b>
At Large 1-Peggy Hart	Present	Mark Fields
At Large 2-Scott Walker	Present	Leland Hardy
Zone 1-Vacant	Vacant	Angela Plowhead
Zone 2-Vacant	Vacant	
Zone 3-Darin Olson (Chair)	Present	
Zone 4-Dave Budeau (Secretary-Treasurer)	Present	
Zone 5-Rochelle Koch (Vice-Chair)	Present	
<b>Staff</b>		<b>Guests</b>
Brenda Sanchez		Les Bachelor
Heath Keirstead		Jason Marshall
Linda Lovett		Brent Stevenson
Becky Pineda		Panha Sen
Susan Ortiz		Abu Balogun
		Alan Vera
		Melissa Miranda

**Note:** All documents and materials displayed or referenced are retained in the Board of Directors Meeting file at the Marion Soil and Water Conservation District (Marion SWCD or District).

**A. Olson Call to Order: 6:32 PM**

- Bachelor, Natural Resources Conservation Service (NRCS)
- Marshall, Pudding River Watershed Council member and Volunteer Marion SWCD SkillsBridge Intern Coordinator
- Stevenson, Santiam Water Control District and Marion SWCD Budget Committee Chair
- Balogun, Miranda, Sen, and Vera, Early College High School-10<sup>th</sup> grade, Salem, OR

**B. Announcements - None**

**C. Agenda Additions or Changes**

- Agenda additions: Oregon Department of Agriculture Scope of Work, Special project Grant, and Partner Grant discussion.

## 1. Public Comment

Keirstead (Staff) introduces the Early College High School students attending the meeting. Keirstead met the students at Salmon Watch last year. They are here to share their team project designed to solve a natural resource challenge. They are members of the Oregon Chapter of Math Engineering Science Achievement Organization (MESA); an after-school club organized to provide space for students to express their technological creativity. Engages historically underrepresented high school students in science, technology, engineering, and math. The students presented a project where they developed a remote-controlled robot with a mechanical arm, that is automated to release a pH sensor to test water and soil quality. Presentation on file.

## 2. District Snapshot

- Conservation Assistance Grants (CAG) –Review Completed 7 applications, \$46,610
- 1 Staff attended the Salmon Recovery Conference to learn about the most recent scientific research and methods in salmon recovery efforts.
- Janice is now part-time working only on T, W, and TH.
- Next -Conservation Club: Oak & Prairie Tour on 5/31
- Tabled two Earth day events; Keiser Rapids and Spong's Landing. Kassi and Keirstead got to help plant a rain garden and teach participants successful planting techniques and run the free compost station donated by Highway Fuel, which offered opportunities to speak with urban landowners who were amending their soil.
- Completed the ODA Strategic Implementation Areas Open House on 4/24 at Central Howell School
- The District set up a water quality focused activity at AgFest 4/27. The schools attending this special day at Ag Fest were all from Marion County, and the schools of both our Focus Area and Strategic Implementation Area were represented.
- Lovett has started developing a Manual of Fiscal Operations, building on Brenda's work documenting processes for Accounts Payable and the Treasurer's Report
- Calkins set up a discussion regarding our volunteer program and to determine next steps for engaging more volunteers in meaningful conservation opportunities.
- Spent time throughout April developing the framework for the Partner Grant Program
- Conservation Planner-Soils Cropland position posted. 13 applicants, 8 interviews next week.

- Co-Hosted a Succession Planning workshop for Producers partnered with Oregon Ag Trust, Marion County Farm Bureau, Polk and Clackamas SWCD's and OSU Extension Small Farms to provide the workshop.
- Started Pesticide Stewardship Partnership sampling
- Manure Managed outreach details have been sorted out and outreach will start in May.
- Finished designing and finalized formatting new, searchable, PDF, hyperlinked policy binder
- Set up and implemented online training by Vector Solutions; such as workplace bullying, and defensive driving courses assigned to staff
- Partnered with the City of Salem to conduct their Urban Streamside Symposium

### 3. Treasurers Report January and February 2023

Sanchez explained that January's Treasurers Report went out to the Directors without the check register for the April 5 Board meeting, approval was moved to the May 3 Board meeting so Sanchez can send Directors the complete report for their review. Sanchez was not able to have March completed in time for the meeting but was able to complete February. Budeau says the reports were sent out in complete format. Olson adds that the graphs (in the Treasurers Report Executive Summary) need to be lighter when printing, they are hard to distinguish the display.

**Action:** Koch motioned for the Board to **approve the January and February 2023 Treasurers Reports**, 2<sup>nd</sup> by Hart. No further discussion. MOTION PASSED (unanimously: Aye-5 (Walker, Olson, Koch, Hart, and Budeau), Opposed-0).

### 4. United States Department of Agriculture (USDA) Services

Bachelor begins that NRCS is wrapping up the ranking deadline for Environmental Quality Incentive Program (EQIP) contracts. It was supposed to end in November 2022 but the national office extended the deadline. Bachelor adds that there is not enough money to cover all the applications, Marion has 2.2 million dollars in applications and Yamhill is around the same, and Clackamas has a fair amount as well. There is only one million dollars available; making it competitive. These are irrigation projects for the cropland drought. About to begin taking applications for the Mid-Willamette 2024 Conservation Incentive Strategy (CIS), may extend for another year due to more activity; bring up at the next Local Working Group to determine.

Sanchez reminds Bachelor that she has the Civil Rights checklist for Koch to sign. Last signature needed.

## 5. Review of April 4, 2023, Board Meeting Minutes

Budeau starts by saying that he reviewed the minutes. Olson points out that he does not have the updated minutes. Sanchez acknowledges that she must have sent the minutes out in the packet that were not reviewed by Budeau. Olson states that the April 4 minutes will be moved to the next Board meeting for approval. Walker adds that he has some concerns related to his conflict-of-interest policy recommendation and would like to amend the minutes to clarify his statement. Olson asks Walker to work with Sanchez to draft clarification.

## 6. 2023-2024 Budget Adoption

Budeau thanks Stevenson and the Budget Committee for their work on the FY 23-24 Budget. Budeau noted that the Board held the Budget Hearing earlier this evening. No public attended the hearing and there was no public comment submitted.

**Budeau moves that be it resolved that the Board of Directors of the Marion Soil and Water Conservation District hereby adopts resolution #050323 and the budget for fiscal year 2023-2024 in the total amount of \$4,315,803 and be it resolved that the following amounts are hereby appropriated for the fiscal year beginning July 1, 2023, for the following purposes: General Fund, \$3,676,819; Multipurpose Reserve Fund, \$316,271; Building Reserve Fund, \$322,713. Total Appropriations, for all funds \$4,315,803 and be it resolved that the following ad valorem property taxes are hereby imposed upon the assessed value of all taxable property within the district for tax year 2023-2024 at the rate of \$0.0500 per \$1000 of assessed value for permanent rate tax and be it resolved that the taxes imposed are hereby categorized for purposes of Article XI (11) section 11b as subject to the General Government Limitation Permanent Rate Tax \$ 0.0500/\$1,000 and Excluded from Limitation General Obligation Bond Debt Service \$ 0.00. Action, 2nd by Walker. No further discussion. MOTION PASSED (unanimously: Aye-5 (Walker, Olson, Koch, Hart, and Budeau), Opposed-0).**

Olson states “Be it resolved that the Board of Directors of the Marion SWCD hereby adopts the budget for financial year 2023-2024 in the total amount of \$4,315,803. The budget is now on file at the District office 408 N Third Ave, Stayton, OR”.

## 7. Proposed Cost of Living Adjustment (COLA)

Sanchez starts by adding that Walker had requested more information; it was included in your packet. Sanchez reviews the budget impact at 0.9 percent and 1.8 percent from potential COLAs over the next year. Sanchez explains that after

reviewing the Consumer Price Index, current trends in property taxes, and additional information, Sanchez proposes a five percent cost of living adjustment for all employees beginning July 1, 2023.

Hart asks for clarification on the wages and benefits percentages that were included in the information. Sanchez explains that there was a one percent increase in wages and a fourteen percent increase in benefits from last year. The benefit increase is related to the additional coverage the Board approved last year to cover sixty-six percent of employee dependents for health and dental care. Walker wants to ensure that COLAs do not increase benefit costs only wages. Directors discussed the current economy and if a COLA is warranted. Walker shared his concern related to the uncertainty of the future and proposes a three percent COLA. Olson adds that he supports five percent because he is concerned about it now and if the economy changes, the Board could adjust. Hart concurs. Stevenson adds that he sits on the Special Districts Association of Oregon Board of Directors and they vote to not give the insurance longevity credits any longer. Special district has had some issues in securing their re-insurance and this may come into play regarding benefits. Hardy adds that it is very important for the District to stay ahead of the curve and not become a place for training and then leave to work for other entities. Hardy adds that he is in favor of the five percent COLA for retainment of current employees. Koch says she is in full support of the five percent if the Board has the option to adjust COLAs annually. Sanchez replies that the Board approved policy to review COLAs annually. Directors continued the debate regarding the economy and future expectations of staff regarding COLAs.

**Action:** Koch motioned for the Board to **approve a five percent cost-of-living adjustment for all staff beginning (FY 23-24) July 1, 2023, 2<sup>nd</sup>** by Hart. No further discussion. MOTION PASSED (Aye-4 (Olson, Koch, Hart, and Budeau), Opposed-1 (Walker)).

## **8. Conservation Assistance Grants (CAG-FKA LAP)**

### **a) Spring Cycle CAG Grants**

The CAG applications were considered for approval. Discussion centered around CAG 20-23-010 project design and budget. Budeau provided additional information regarding costs and project details related to pollinator habitat. Row spacing and the number of rows were discussed. Budeau displays that the project should only cost \$1,676 for a new project total of \$4,047.62 if there were less rows and less planting density. Discussion related to the types of supplies the District should pay for ensued. Roosth (Staff), planner on the

project, walked the Directors through the project details. Budeau supports the project at \$1,676. Koch adds that the staff needs more guidance from us on what supplies will be paid for and supports the changes Budeau is providing. Discussion ended on details of two other projects. Ortiz (Staff) reviews the spreadsheet with all the CAG applications and recommendations from the review committee. Stipulations from committee were related to # 080 (irrigation design), # 010 (plant spacing and herbicide amounts), and #013 (complete in fall-winter, revise for low-growing shrubs, and #015 (add geo textile to road).

Walker asks if there are any conflicts of interest with these projects. There have been no conflict of interests declared. Ortiz adds that at the top of the spreadsheet it notes that it is the Directors responsibility to declare conflict of interest. Plowhead adds that she may have a conflict of interest with Scenic Valley Farms, contributed to her campaign; Plowhead is not a voting member of the Board and did not participate in any conversation related to the grant project.

**Action:** Olson motioned for the Board to **approve the Conservation Assistance Grants for a total of \$48,251.30, with projects as amended**, 2<sup>nd</sup> by Hart. No further discussion. MOTION PASSED (Aye-4 (Olson, Koch, Hart, and Budeau), Opposed-1 (Walker)).

**b) Grants Completed**

Staff created a slideshow of completed projects for Directors to review. Presentation on file.

**9. Oregon Department of Agriculture Scope of Work and Capacity Grant.**

Sanchez begins by describing the Oregon Department Agriculture Scope of Work and Capacity Grant that is due May 31, 2023. The grant assists the District with capacity (operating) funds and technical assistance, outreach, and partner engagement funds. The total available grant funds will be determined at the next Oregon Watershed Enhancement Board meeting in July, but for now they ask to submit a budget based on the previous biennium funding of \$175,815. Sanchez explains that every two years we submit a new application for the next two FY years (23-24 and 24-25). Sanchez displays the breakdown of the grant budget and request, explaining that it is pretty much identical to the previous biennium and that we will be continuing with the Focus Area.

**Action:** Walker motioned for the Board to **approve the Oregon Department of Agriculture Scope of Work and Capacity Grant submission**, 2<sup>nd</sup> by Hart. No



further discussion. MOTION PASSED (unanimously: Aye-5 (Walker, Olson, Koch, Hart, and Budeau), Opposed-0).

### **10. Special Projects Grant (SPG)**

Hart started the conversation by pointing out that this grant was problematic because it should have been sent through the CAG application process but now as a SPG. Budeau adds that this was a one off and although it does not meet the intent of the SPG the committee recommends that the Board approve the grant because it would not be good to send it back to the landowner because it was the fault of the District to not have moved it into the CAG.

Walker asks if the District evaluates the financial position of the applicant because it is noted in the application. Sanchez says no we do not inquire about their financial position. Directors discussed the need for justifying projects based on financial need. Olson adds that the committee could review and make changes to programs for the board to review. Walker encourages the Board to review the details of all the programs and make sure money is being used for the intended purpose.

**Action:** Olson motioned for the Board to **approve the SPG grant**, 2<sup>nd</sup> by Hart. Olson adds that the committee should review the SPG program. MOTION PASSED (Aye-4 (Olson, Koch, Hart, and Budeau), Opposed-1 (Walker)).

Walker goes onto express his disappointment in last month's meeting and that his policy for declaring a conflict of interest died. Walker expresses that he will have a personal policy of asking the Board, when approving projects, if there are any conflicts of interest from the Board, associates, or staff.

### **11. Partner Grant Discussion**

Olson begins by stating he has some questions regarding the grant such as "What if they do not use the money?" or "How long will they have to spend the funds?" Because of this Olson would like the Partner Grant to go back to the committee to iron out more details before the Board considers the program. Walker discusses his concerns related to the capacity portion of the grant and that we do not fund inadequate entities. Directors continued the discussion regarding program details. Sanchez adds that we can have the Partner Grant on the June 21 Natural Resource Committee, iron out the details and then bring it to either July or August for Board approval. Ortiz's presentation was requested again at the committee meeting and maybe all the Directors should join the committee meeting to view the presentation and to take part in the Partner Grant details.

**Adjourn:** Chair Olson adjourned the meeting at 8:49 PM



Marion Soil and Water Conservation District complies with the American with Disabilities Act (ADA) and does not discriminate based on race, color, national origin, gender, religion, age, disability, political beliefs, sexual orientation, and marital or family status. If special physical, language, or other accommodations are needed for this meeting, please contact the District Manager at 503-391-9927 as soon as possible, and at least 48 hours in advance of the meeting.



**Marion Soil and Water Conservation District**  
**Board of Directors Budget Hearing Minutes DRAFT**  
 May 3, 2023  
 6:01 PM to 6:16 PM  
 Facilitator: Chair Olson  
 Recorded by: Brenda Sanchez

Meeting offered in-person at our location in Stayton, OR, by video conference, and by telephone.

Directors & Record of Attendance		Associate Directors
Zone 1-Vacant	Vacant	Mark Fields
Zone 2-Vacant	Vacant	Leland Hardy
Zone 3-Darin Olson (Chair)	Present (In Person)	Angela Plowhead
Zone 4-Dave Budeau (Secretary-Treasurer)	Present (In Person)	
Zone 5-Rochelle Koch (Vice-Chair)	Present (In Person)	
At Large 1-Peggy Hart	Present (In Person)	
At Large 2-Scott Walker	Present (In Person)	
Staff		Guests
Brenda Sanchez		Brent Stevenson
Linda Lovett		Rich Rodriguez

**Note:** All documents and materials displayed or referenced are retained in the Board of Directors Meeting file at the Marion Soil and Water Conservation District (Marion SWCD or District).

**A. Olson Call to Order: 6:00 PM**

- Stevenson, Santiam Water Control District and Marion SWCD Budget Committee Chair
- Rodriguez, public

**B. Agenda Additions or Changes: No changes**

**1. Presentation of Proposed Budget**

Sanchez displayed the LB-1 Form with the approved fiscal year 2023-2024 budget and read the budget totals.

**2. Public Comment:** No public comments were presented or submitted.

**Adjourn:** Chair Olson adjourned the meeting at 6:16 PM



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## **2022 Performance Evaluations and Proposed Step Increases for Staff**

Employee performance evaluations are an essential communication process between the employee and the District manager. The job description lets an employee know what is expected, and the evaluation lets the employee know how he or she is performing in relation to the expectations. Reviewing performance evaluations with an employee accomplishes the following:

- Communicating and clarifying District goals and objectives;
- Identifying individual accountability for the accomplishment of District goals and objectives;
- Evaluating and improving individual and District accomplishments; and
- Using the performance evaluation as a basis for rewarding employees or warning of deficiencies that may lead to personnel actions.

All regular employees shall have a job description and receive a formal performance evaluation at least annually. The first evaluation will normally occur no later than 6 months from hiring or promotion to a new position, and thereafter on an annual basis. Below are the staff proposed for a step increase after their 2022 Performance Evaluation resulted in a “Meets Expectations” or higher performance criteria. Performance Evaluations were completed in March 2023. They were all completed in March so the new District Manager could catch up with pending evaluations. Future performance evaluations will occur soon after an employee’s annual hire date.

The District Staff listed below excelled through a highly demanding, transitional period, with new management, new staff, even a new Board, and each one on their own deserves a step increase. Each employee took on their own management at times, sifting through a very deep and unorganized filing system to find what they need to complete their work, stepping up to get their job done when direction was vague or being sorted out by a new manager.

They all worked through the challenges of not having a full team. They each took on additional work and responsibilities to help the District keep pace and provide high-quality customer service. At times blind-sided by the amount of work they would have to take on and how they had to adjust their work schedule to accommodate the increased workloads, re-prioritize their work, and work at a more hurried pace to accomplish the additional work. All while taking the time to help me learn my job.

They each fully and effectively participated in a collaborative hybrid work environment. Each employee stepped up where they could and helped their team members with many work items and needs. Each one of them have engaged and trained new staff, which has been several, including Jason, our SkillsBridge intern. It is because of their hard work and dedication to the District that we were able to get through all the changes and continue to conduct business.

Because the District is “catching up” and if step increases are approved, they will be awarded retroactively to their annual hire date. Except for Lovett who has completed her six-month introductory period; her step increase will be (retroactively) awarded six months from hire date.

Retro step increases would be paid out in June 2023 payroll.

A copy of the performance review template is provided.

	<b>Performance Evaluation Date</b>	<b>Retroactive Start Date for Step Increase</b>
<b>Becky Pineda</b>	08-Mar-23	11/23/2022
<b>Heath Keirstead</b>	21-Mar-23	01/10/2023
<b>Janice Calkins</b>	28-Mar-23	08/14/2022
<b>Linda Lovett</b>	14-Mar-23	03/29/2022
<b>Sarah Hamilton</b>	15-Mar-23	05/07/2023
<b>Susan Ortiz</b>	07-Mar-23	07/01/2022
<b>Tom Wilson</b>	16-Mar-23	07/16/2022



## Marion Soil & Water Conservation District Employee Performance Evaluation

<b>Employee Name</b>		<b>Six Month Introductory</b>	<input type="checkbox"/>
<b>Position</b>		<b>Annual</b>	<input type="checkbox"/>
<b>Hire Date</b>		<b>Date of Last Review</b>	
<b>Date of Evaluation</b>		<b>Period of Evaluation</b>	

**Instructions:** Mark the appropriate letter that best applies to the level of performance the employee has reached during the evaluation period. Note any comments related to the decision on the lines below. Areas rated “Unsatisfactory”, or “Needs Improvement” will be included in a development plan for the employee, so that corrective action can be taken to bring the performance up to a satisfactory level.

The ratings below are meant to be a guide and should not be used as strict or explicit statements. See Appendix A Rating Guide for expanded definitions. The evaluator may add comments regarding each rating to explain or illustrate the job behavior identified.

Performance Ratings				
U-Unsatisfactory Performance	N-Needs Improvement	M-Meets Expectations	E-Exceeds Expectations	O-Outstanding Performance
Seldom meets established standards; must improve for continued employment.	Meets most position performance requirements, requires significant direct supervision, performs work assignments and no more, works close to the lower limit of acceptability.	<input type="checkbox"/> (6-Month IP) Employee is developing new skills and gaining new knowledge.  <input type="checkbox"/> (Annual) Employee meets and occasionally exceeds established standards.	Consistently meets and frequently exceeds expected levels of performance.	Consistently meets and almost always exceeds expected levels of performance.

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### Performance Evaluation

**1. Job Knowledge, Skills, Ability, and Professional Development:** The extent to which the employee:

- Understands aspects of position and demonstrates ability to perform job duties and responsibilities.
- Demonstrates professional, administrative, and/or specialized knowledge required to perform the job and the ability to apply new information to enhance effectiveness on the job.

- Is current on the latest concepts, techniques, and methods relative to areas of responsibility.
- Pursues further advancements to overall job-related knowledge through additional course work, seminars, and reading.

**Rating:**

**Comments:**

**2. Productivity and Accuracy:** The extent to which the employee:

- Yields appropriate work output or volume.
- Shows attention to detail and follows directions and instructions.
- Work products are accurate, presentable, appropriate, clear, and precise.

**Rating:**

**Comments:**

**3. Quantity of Work:** The extent to which the employee's work:

- Demonstrates the ability to manage and accomplish several responsibilities simultaneously.
- Demonstrates the willingness and ability to carry a fair share of the workload.
- Routinely discusses current workload with District Manager or supervisor.
- When appropriate coordinates workload with others.
- Establishes appropriate job priorities.

**Rating:**

**Comments:**

**4. Problem Identification, Solving, and Analytical Skills:** The extent to which the employee:

- Effectively identifies and analyzes present and prospective problems.
- Identifies causes and determines appropriate action for effective solutions.
- Exhibits timely and decisive action.

**Rating:**

**Comments:**

**5. Initiative, Innovation, and Creativity:** The extent to which the employee:

- Develops new ideas, alternative methods, suggests different procedures, enhancements to existing conditions, and overall improvements within his/her area(s) of responsibility.
- Promotes/facilitates innovation/creativity on the part of others.
- Is self-starting, resourceful, creative as applied to duties of position.
- Seeks and assumes greater responsibility and follows through appropriately.

**Rating:**

**Comments:**

**6. Organizing/Planning:** The extent to which the employee:

- Plans and organizes his/her work.
- Completes all assignments and tasks in a timely manner.
- Effectively budgets time, is well organized and focused.
- Monitors projects effectively and independently.
- Establishes and accomplishes goals, objectives, and routine operating duties in a competent and timely manner.

**Rating:**

**Comments:**

**7. Cost Effectiveness:** The extent to which the employee:

- Follows District policy and effectively manages their credit/compensatory leave accrual and use.
- Appropriately uses sick, annual, and other types of approved leave or absences.
- Coordinates with others where suitable.
- Conserves, preserves, and economizes where expendable resources are concerned.

**Rating:**

**Comments:**

**8. Dependability:** The extent to which the employee:

- Follows through on commitments.
- Adheres to established time frames.
- Is on time for work-related meetings and appointments.

**Rating:**

**Comments:**

**9. Interpersonal and Communication Skills:** The extent to which the employee:

- Fosters an environment of collaboration, teamwork, and mutual respect through effective communication.
- Demonstrates effective communication skills, oral, and written.
- Effectively articulates own position while taking into consideration conflicting views and/or positions.
- Listens well, responds appropriately, and interacts effectively without alienating others.
- Effective communication style with all levels of personnel and Board Members

**Rating:**

**Comments:**

**10. Integrity:** The extent to which the employee:

- Represents self and the District in a positive manner.
- Understands and maintains confidentiality when needed.



**Rating:**

**Comments:**

**11. Flexibility:** The extent to which the employee:

- Adapts to change.
- Evaluates and accepts new ideas and approaches to work when suitable.
- Responds appropriately to critical comments and to suggestions for work improvement.

**Rating:**

**Comments:**

**12. Cooperation and Teamwork:** The extent to which the employee functions as a team participant:

- Acts as a cohesive member of a team; demonstrates appropriate interactions with other employees.
- Achieves goals/objectives specifically by working with and when appropriate through others.
- Is cooperative and easily obtains cooperation from others.
- Is a willing participant in problem solving regardless of whether the situation has a direct bearing on his/her area of responsibility.
- Compromises, is flexible, recognizes the needs of the overall organization.
- Is willing to make concessions.
- Maintains a positive working relationship with District Manager, Board Members, with peers and those who report to and/or interact with employees.

**Rating:**

**Comments:**

**13. Public and Customer Relations:** The extent to which the employee:

- Understands and accepts the role of public service.
- Demonstrates an understanding of public service standards and District policy and strives to achieve them, treats all with respect and dignity, and demonstrates courtesy in all interactions.
- Achieves positive relations and contributes to a positive public image of the overall organization.
- Is accessible and appropriate to everyone.

**Rating:**

**Comments:**

**14. Compliance:** The extent to which the employee:

- Works within legal, regulatory, and ethical practice standards relevant to the position.
- Follows safe practices required for the position.
- Complies with applicable policies and procedures.

- Brings potential compliance matters to the District Manager.
- Complies with training requirements, as appropriate to position.

**Rating:**

**Comments:**

**Narrative Summary:**

**Overall Rating:** Put an "X" where the description most closely approximates this employee's total impact on and overall contribution to the Marion SWCD.

- U - Unsatisfactory Performance
- N - Needs Improvement
- M - Meets Expectations
- E - Exceeds Expectations
- O - Outstanding

**Exceeds Expectations** – This employee is very accomplished in all work areas and demonstrates consistently proficient and solid performance in critical areas and exhibits sustained support of goals; is effective, consistent, and competent in meeting job expectations. This employee demonstrates ethical and collaborative behaviors that result in positive working relationships; consistently demonstrates significant knowledge, skills, and abilities required to accomplish job expectations.

This employee skillfully handles a variety of interpersonal situations. This employee typically performs above expectations in meeting deadlines, using critical thinking skills, and creativity to accomplish tasks, projects, and objectives. This employee often seeks out additional responsibility. This employee does not need direct supervision.

**Employee Comments:**

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**Recommend for Pay Raise:**

- Yes
- No, If No, state reason:

**Introductory Basis Only**

**Recommend hiring as a Regular Employee:**  Yes  No If No, state reason:

By signing this document below, I acknowledge that this evaluation has been reviewed and discussed with me. Your signature does not imply that you agree with any or all the evaluation remarks, only that you have been given an opportunity to participate in the process and has seen this review.

Signature: \_\_\_\_\_  
Employee

Date:

Signature: \_\_\_\_\_  
District Manager

Date:

### Appendix A-Rating Guide (Expanded Definitions):

**(0) Unacceptable Performance** - This employee's performance or behavior needs improvement and/or is inconsistent or unacceptable. This employee may fail to meet one or more core performance standards and/or key job expectations and has had an identified action plan to ensure progress toward achieving all performance standards. Work previously identified as less than acceptable has not reached the expected level of performance.

**(1) Needs Improvement** - Meets most position performance requirements<sup>1/</sup>, requires significant direct supervision, performs work assignments and no more, works close to the lower limit of acceptability, seldom contributes towards helping others to succeed<sup>2/</sup>, a poor team member, usually does not relate to how the task at hand relates with overall District goals, some improvement in work habits or performance needed. Needs to be aware of performance deficiencies and work immediately to correct or improve for continued employment.

**(2) Meets Expectations** - This employee meets job expectations. This employee may sometimes require more supervision, and work may require more revision or adjustment to meet expectations. Assignments are completed but occasionally require assistance from supervisor or peers.

*OR* This employee is developing new skills and gaining new knowledge, leading toward performing all expectations and objective of the job. This employee may be new to the position or job duties and may not have completed a full work cycle; this employee is still learning the job. This employee may need time to develop skills to be more proficient in the current position.

This employee is cooperative and treats customers, co-workers, and supervisors with respect and courtesy.

**(3) Exceeds Expectations** - This employee is very accomplished in all work areas and demonstrates consistently proficient and solid performance in critical areas and exhibits sustained support of goals; is effective, consistent, and competent in meeting job expectations. This employee demonstrates ethical and collaborative behaviors that result in positive working

relationships; consistently demonstrates significant knowledge, skills, and abilities required to accomplish job expectations.

This employee skillfully handles a variety of interpersonal situations. This employee typically performs above expectations in meeting deadlines, using critical thinking skills, and creativity to accomplish tasks, projects, and objectives. This employee often seeks out additional responsibility. This employee does not need direct supervision.

**(4) Outstanding Performance** – This employee performs at a level which results in significant accomplishments that may not have been otherwise achieved. This employee seeks out responsibility; shows a comprehensive understanding of the job objectives and is exemplary in meeting them. This employee is a master of the skills and abilities required for the job; is highly knowledgeable; may be sought out by others for job leadership, counsel, information, and/or direction. This employee may mentor or teach others; is a team player; creates and maintains positive working relationships; is a role model for behaviors necessary for success.

This employee completed complex or difficult assignments intelligently and effectively. This employee is innovative and produces an exceptional quantity of work, often ahead of schedule and with little supervision. The employee utilizes collaborative communication, actions, behaviors, and work skills and develops effective working relationships with others; improves cooperation among participants in the workplace and prevents misunderstandings. This employee is proactive and demonstrates foresight in correcting situations that may cause future problems. This employee demonstrates innovation in meeting work demands and may demonstrate leadership skills.

1/ Refer to position description for performance range.

2/ “helping others to succeed” is used here to mean – the individual offers technical training, provides welcome suggestions, and suggestions, and is generally concerned about overall office success. It may include helping others but does not include doing another’s work for them.

## Conservation Grants (CAG, LAP)

### Request for Extension

*For Board Approval*

<b>Delany Family LLC</b>	<u>LAP-20-22-039 – Hazelnut Erosion Control</u> 327   Conservation Cover	New End Date: May 5, 2024
	Current End Date: May 5, 2023  <i>Reason:</i> Still trying to find a planter to plant the cover.	

### Cancellation(s)

*For Board Information*

<b>JKL Enterprises</b>	<u>LAP-20-21-041 – Lackner Post Fire Restoration</u>	
	<i>Reason:</i> The project was completed using other grant dollars through the North Santiam Watershed council	
<b>City of Aurora</b>	<u>LAP-20-21-043 – Aurora Mills Park Enhancement</u>	
	<i>Reason:</i> Benefit of this Agreement increasingly did not make financial / budgetary sense to keep going with for the City of Aurora.	
<b>Scenic Valley Farms, LLC</b>	<u>CAG-20-23-015 – Salmon Safe Gravel / Moisture</u>	
	<b><u>Cancelled One Practice</u></b> <b>Practice #560 – Access Road</b> <i>Reason:</i> The stipulations given for the project by the CAG review committee were more of a project than we are able to commit to at this time.	

# Completed Conservation Grants

May 2023



1

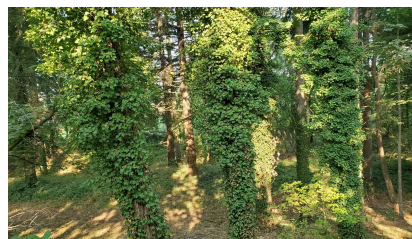


**LAP 20-22-023**

## Blackman Restoration Project

- 314- Brush control
- 612- Tree and Shrub Establishment
- 327- Conservation Cover

Controlled and removed invasive plants including English Ivy and Himalayan Blackberry in a 5-acre riparian woodland. Planted native trees and shrubs and seeded with native grass seed.



*Before; Spring 2021*



*After; May 2023*

2



## LAP-20-22-013

## Spirit Farm Sprinklers

### 441 – Micro Irrigation

Installation of filter, underground mainline, and two drip lines per tree row. System has multiple zones to manage water use for different ages and needs of trees.



3

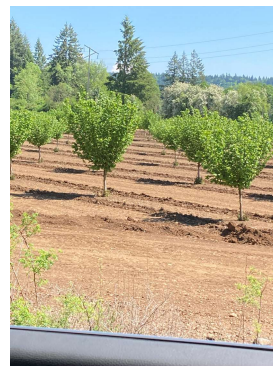


## LAP-20-22-038

## Keudell Farms Irrigation Efficiency

### 441 – Micro Irrigation

Converted from overhead, big-gun irrigation to underground drip. System will conserve water and decrease erosion along a nearby creek.



4