



Kim Carpenter <khcarpenter@rcsnc.org>

Fwd: [EXTERNAL] RCS emails public records request.

1 message

David Sutton <dsutton@rcsnc.org>
 To: Kim Carpenter <khcarpenter@rcsnc.org>

Mon, Apr 28, 2025 at 9:45 AM

Please pull records for our review.

David M. Sutton, Ed.D.
 Superintendent
 Rutherford County Schools
 382 West Main Street | Forest City, NC 28043
 Phone 828.288.2200 | Fax 828.288.2490

All email correspondence to and from this address is subject to the North Carolina Public Records Law (N. C. Gen. Stat. § 132-1 et seq.), which may result in monitoring and disclosure to third parties, including law enforcement.

----- Forwarded message -----

From: **Judge J. Baxter** <Judge.J.Baxter@proton.me>
 Date: Tue, Apr 22, 2025 at 11:45AM
 Subject: [EXTERNAL] RCS emails public records request.
 To: David Sutton <dsutton@rcsnc.org>, pmorrow@rcsnc.org <pmorrow@rcsnc.org>

Dear Rutherford County Schools,

Please reply promptly to the following public records request, which I'm making in accordance with NC Public Records Law. https://www.ncleg.net/enactedlegislation/statutes/html/bychapter/chapter_132.html

**** I'm simply requesting an electronic copy of an electronic record, if one exists. I'm NOT asking for the opportunity to come in person to "inspect", nor to obtain a printed copy of this electronic record. I'm requesting explicitly that any responsive info be provided to me via the electronic medium / electronic format (in which the copy of this record already exists). If you are unable to fulfill any or all parts of this request, please specifically cite where a reason for denial is justified under NC Public Records Law. ****

I am requesting in this public record request the following.

1. A copy of all emails sent or received by Rutherford County Schools employees, board members, or superintendent with the email domain of @hilconsultants.com
2. A copy of all emails sent or received by Rutherford County Schools employees, board members, or superintendent that contain at least one of the names in the list below -

- H. Hank Hurd

- Kathy Isenhour
- Frank Lopes
- Minne Forte-Brown
- Brenda Jones
- Glenda Jones
- Dr. Denise Morton
- Kay Williams
- Derek Graham
- Tracy Sigman
- Deborah Frisby

These requests are for those emails from the time period of June 1, 2023 to January 30, 2024.

Please process this request as quickly as possible because we have a pending story.

Please note that by submitting this request, I'm NOT agreeing to pay any potential fees or associated costs related to my request. If it isn't possible to process the request without incurring fees, then please let me know the itemized potential cost and explanations for those charges upfront, and DO NOT proceed until I respond.

By Law I'm not required to provide a name or address to associate with a public records request, but in order to move things along I'd like to clarify that this request is being made by:

Judge John Baxter and associates

534 North Broadway
Knoxville, TN 37917

Sent with Proton Mail **secure email**.

"All e-mail correspondence to and from this address is subject to the North Carolina Public Records Law, which may result in monitoring and disclosure to third parties, including law enforcement."

[EXTERNAL] Fwd: Rutherford Executive Summary and Addendum

hhurd@hilconsultants.com Hank Hurd

Friday, December 8, 2023 at 9:47:17 AM Eastern Standard Time

To: dsutton@rcsnc.org David Sutton

Cc: kisenhour@hilconsultants.com Kathy Isenhour

Good morning Dr. Sutton- Kathy and I appreciate your taking time to meet with us on Wednesday to review HIL's observations and recommendations.

I am attaching the final report and an addendum which explains in detail possible options that may allow you to have greater purchasing power with the dollar allotments by reviewing the duties of facilitators and lead teachers.

Yesterday Kathy and one of our payroll/benefit consultant followed up with Dr. Ash and Ms Cobb on Thursday morning regarding processing employee's retirement. Kathy also worked with Dr. Ash answering some of her questions.

Going forward we believe you are in excellent hands with Ms. Kelly and Ms. Frisby serving as her mentor.

Feel free to contact me in the future if we can be of further assistance or if you have questions regarding our recommendations.

I hope you and your family have a wonderful Holiday Season.

Best regards,

Hank

Hank Hurd, CEO

Attachments:**592c7442.png** 11k**RutherfordExSummaryNovember2023F.pdf** 433k**RutherfordExSummaryAddendum (1).pdf** 198k



Post Office Box 9032, Hickory, NC 28603

Executive Summary
Rutherford County Schools
November 9, 2023

Rutherford County Schools (RCS) engaged Hurd, Isenhour, Lopes, LLC (HIL Consultants) to review the fiscal wellness of the district and current budget processes with an emphasis on sustainability and recommendations for best practices. The district serves approximately 7,300 students at 18 K-12 schools and a central pre-kindergarten center.

Similar to the nation-wide trend for public school districts, the student membership decreased during the pandemic and continues to decline. RCS has experienced a decrease of nearly 600 students since 2018. The number of RCS students attending charter schools for the current 2023-2024 year totals 1,305. Operational revenues from Rutherford County for the current fiscal year total \$16.6 million with approximately \$2.58 million paid to the charter schools serving RCS students. That leaves the district with a \$14 million operating budget.

During the 2022-2023 fiscal year, RCS exceeded the Local revenues received by \$4 million. This is in addition to spending over \$4.3 million in one-time revenues received from the Federal Elementary and Secondary School Emergency Relief (ESSER) funds. The deficit was brought to the attention of the Board of Education and the Executive Leadership late in the fiscal year. In addition, the district has an interim finance officer as of October 1, 2023.

Our review included analysis of multi-year budgets, multi-year audits, along with the current and the previous year's budgeting of human resources for optimum use of resources. As part of the fiscal wellness review, HIL Consultants interviewed the following leadership and staff.

- Dr. David Sutton, Superintendent
- Dr. Tammy Ash, Executive Director of Human Resources
- Dr. Renee Collins, Assistant Superintendent of C & I
- Dr. Keith Silver, Federal Programs Director
- Brad Teague, Chief Operating Officer
- Kim Carpenter, Chief Operating Officer
- Michelle Alcorn, Exceptional Children's Director

Finance Staff Interview:

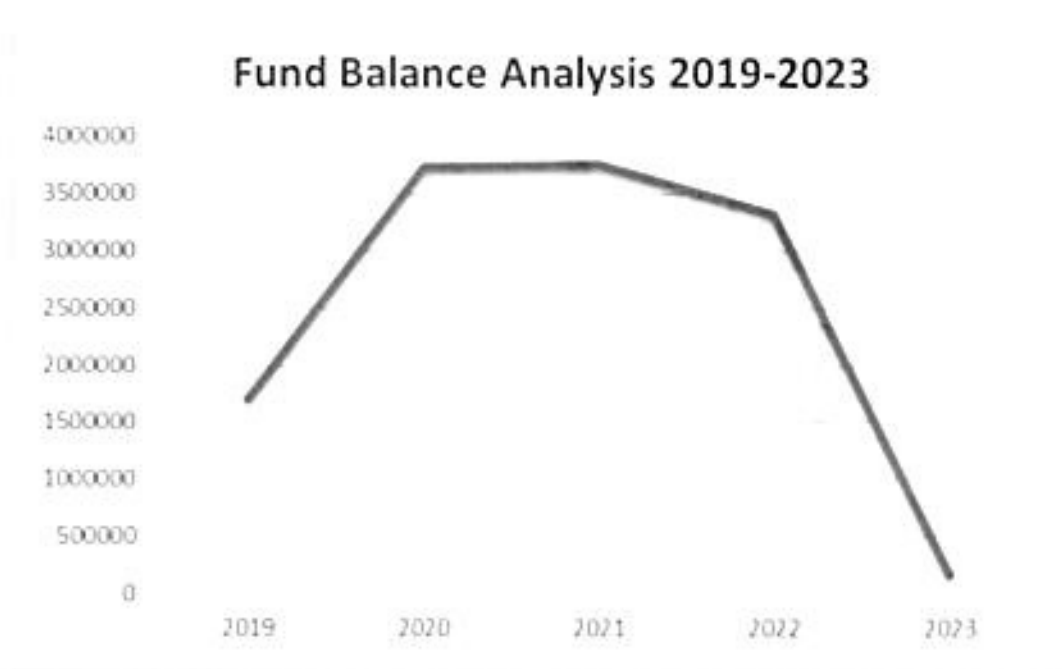
- Angie Ownbey, Interim Finance Officer
- Casey Brown, Accounts Payable/Accounts Receivable
- Anita Bradley, Payroll Analyst
- John Morris, Budget Analyst

Fund Balance

**Five-Year Fund Balance Analysis
Local Current Expense Fund (Audited)**

2019	2020	2021	2022	2023
1,705,112	\$3,737,487	\$ 3,761,568	\$3,323,354	161,797

Source: Rutherford County Schools Audits, 2019-2023



At the end of the 2019 fiscal year, RCS had \$1.7 million in Fund Balance. Fund Balance increased to over \$3.7 million at the end of the 2021 fiscal year. During the next two fiscal years, RCS received over \$23 million in Federal ESSER funds. At the end of the 2023 fiscal year, \$10 million was remaining in the ESSER fund and RCS has used essentially all the Local Fund Balance.

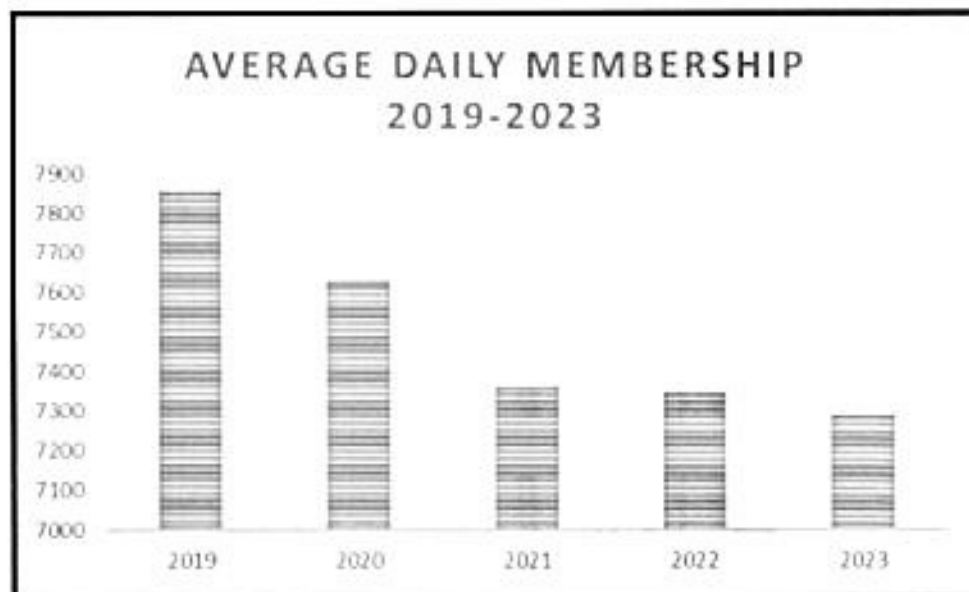
Average Daily Membership

RCS has experienced a continuing decline in student population over the past five years. The district reported over 7,800 students during the 2018-2019 school year. The average daily membership during the second month of school in 2022-2023 totaled 7,289, resulting in a decrease of over 500 students.

Average Daily Membership

2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
7,856	7,626	7,363	7,346	7,289

Source: North Carolina Department of Public Instruction, Student Accounting, 2019-2023



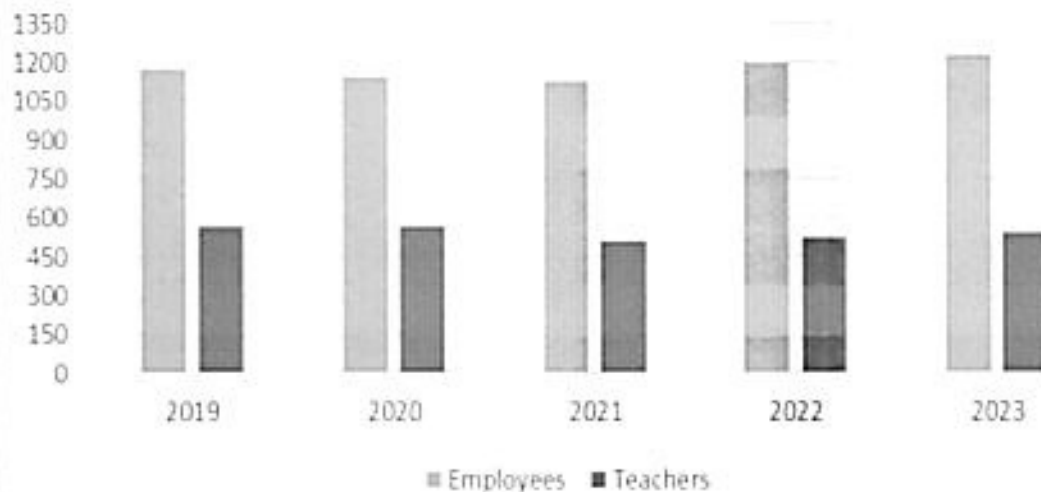
During this same period, RCS increased the number of employees from a low of 1,129 employees during the middle of the pandemic in 2021 to a high of 1,223 full-time employees during the 2023 school year.

Human Capital

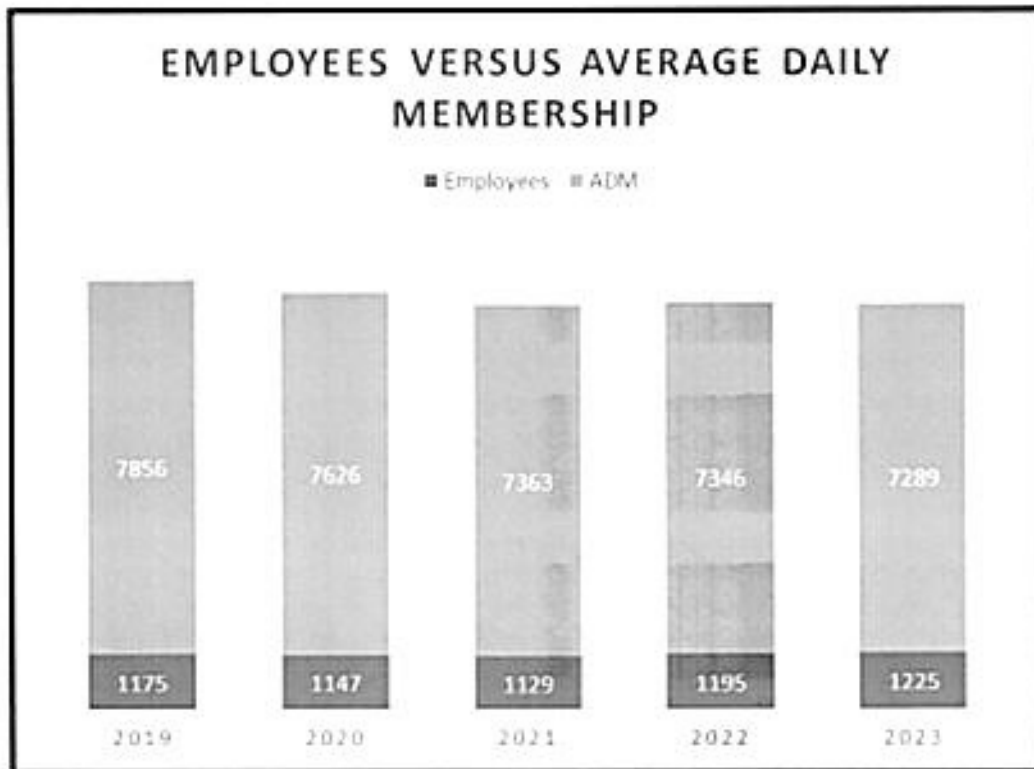
Full-time employees 2019-2023

Year	Total Full-time	Teachers
2019	1,175	543
2020	1,147	523
2021	1,129	511
2022	1,195	565
2023	1,225	569

**Full-Time Employees including Teachers
2019-2023**



As the chart indicates, the number of employees, including classroom teachers, increased even though the membership continued to decline.



Observations

- During our review of the data provided by staff, it appears monitoring of the budget is not being done on a regular basis throughout the fiscal year. The 2022-2023 budget reflected inflated revenues which resulted in overspending.
- Finance staff indicated program managers have access to their respective budgets. HIL consultants interviewed district leadership and most indicated they did not have access to the budgets to monitor throughout the year. The academic and operational programs indicated they relied on the finance department to tell them what funds were available. It appears there is a communication gap between program staff with respect to monitoring and managing the respective budgets. The Federal Grants and the Exceptional Children program directors indicated they were able to stay within their respective budgets by receiving the initial allocations from the Department of Public Instruction (DPI) and entering the budgets through the DPI Comprehensive Continuous Improvement Plan (CCIP) budget program. The Federal Grants Director is also responsible for elementary education but does not have access to the budget.
- There is not a position control system in place to prevent over-hiring of personnel.
- The HR department is paper-driven versus automated integration between the HR and Finance departments. The Executive Director for Human Resources has been in the position for a few months and was previously the Director of Exceptional Children. Currently, the HR staff is in the process of learning the various processes and procedures including assisting employees through the retirement processes.
- Since the pandemic, RCS has been employing full-time substitutes in the schools due to a shortage of substitutes.
- RCS does not have equitable and consistent allocation formulas for allocating human resources to the schools.
- A review of the 2022-2023 budget indicated several budget amendments and transfers of personnel for the entire year were completed in May and June versus placing personnel on the correct funding source during the year.
- The State funds approximately 50 teacher assistants, however, during the 2023 school year, RCS employed close to 90 teacher assistants with the majority of the difference funded from Federal ESSER funds which are slated to expire in September 2024.

- Over \$3 million was expended from Local resources for teachers and instructional support personnel in 2023. Another possible funding source for these positions could have been the Federal ESSER III funds to minimize the use of the local fund balance.
- The Special Revenue Fund (Fund 8) has a fund balance as of June 30, 2023 totaling \$6.1 million. The majority of the Special Revenue Funds are restricted in how the funds may be spent such as Medicaid Fee for Service and Medicaid Outreach Revenues. These cannot be used to sustain or supplement the Local Current Expense Fund expenditures.
- RCS terminated a number of vacancies and temporary personnel at the end of the 2023 fiscal year. The majority of these positions were funded from Federal ESSER grants.
- Revenues received from the County Commissioners have increased slightly over the past four years while expenditures have outpaced the revenues resulting in a decline of the district's Fund Balance. Payments to the charter schools by RCS have increased over the same period in part due to the increase in the number of students attending charter schools.
- RCSs has less than \$200,000 remaining in the Local Fund Balance as of June 30, 2023. This is a critically low amount for a district the size of RCS in the event of an emergency. During the interviews with the program leadership, the district does not have a solid contingency plan, especially once the remaining ESSER III funds expire.
- Directors who oversee elementary, secondary, and curriculum and the chief operations officer indicated they do not have budgets and must request essential curriculum supplies, materials and facility needs for the schools from the finance officer.
- A review of the current instructional staff indicated a teacher was being paid from a program area because of the teacher's certification versus the actual instruction. This practice could result in an audit exception for RCS.

Recommendations

- Recommend the district implement a position control system to prevent over-hiring. Until a system can be implemented, HIL recommends each vacancy be reviewed to ensure a funding source is available before the vacancy is posted.
- Recommend a review of the use of full-time temporary substitutes. Per the Federal Affordable Care Act, employees consistently working over 29.5 hours per week for more than six months should be offered benefits. It is our understanding that the district terminates these positions in December each year and rehires in January in the same capacity.
- Recommend RCS leadership begin as soon as possible reviewing the 2023-2024 budget in detail. The district should consider zero-based budgeting for the 2024-2025 budget cycle. Zero-based budgeting requires every budgeted line item to be reviewed for relevance in meeting RCS's strategic plan.
- Recommend the Executive Director of HR and the CFO meet with RCS Executive Leadership to develop personnel allocation formulas for all schools that are equitable, consistent, and sustainable.
- As the remaining ESSER funding expires, HIL recommends RCS review the remaining Federal Grants and revise plans as needed. Most Federal Grants have a non-supplant requirement and Title 1 schools must maintain comparability to non-Title 1 schools. HIL finds that well-managed districts maximize the use of federal grants to the extent possible. This may mean rethinking how to fund personnel without jeopardizing the Federal requirements.
- The district will need to review all expenditures currently paid from ESSER funds to determine what alternative funding sources will be available, if any, as these funds will expire in September 2024. Our review indicates more than 70 positions are currently funded by ESSER III, including 64 instructional positions.
- The district currently has a lease agreement with Apple for student devices. The lease was paid from Capital Outlay funds in 2023 which limited the remaining funds for other capital projects.

- The Chief Finance Officer should begin meeting regularly with each program director to review budgets and project expenditures through the end of the year. Software is available for program managers to see their respective budgets in real time. If training is needed for the budgets, HIL recommends finance staff train staff in the use of the budget software.
- The Executive Director of Human Resources and Chief Finance Officer should review the funding source for all certified personnel to ensure the funding source, certification and class duties are in alignment with funding regulations. This will prevent salary audit exceptions by DPI and /or the independent auditor findings at year-end.
- Recommend RCS review modernization software available (including the current RCS finance software vendor) to automate and integrate Human Resources data with payroll financial data. This will not only eliminate paper personnel action forms but will also ensure the position control integrity.

HIL appreciates the opportunity to assist RCS and is available to assist the district in implementing any of these recommendations.

Hank Hurd
919-698-5449
hhurd@HILconsultants.com
www.hilconsultants.com



Post Office Box 9032, Hickory, NC 28603

Executive Summary- Addendum
Rutherford County Schools
December 7, 2023

HIL Consultants reviewed the Executive Summary, dated November 9, 2023, with Dr. David Sutton, Superintendent, Ms. Jolie Kelly (new CFO) and Deborah Frisby (NCASBO assigned mentor) on Wednesday, December 6th.

As stated in the Executive Summary, a review of the 2022-2023 budget HIL provided several recommendations. Since November, HIL has reviewed the current 2023-2024 budget and followed up weekly with the NCASBO mentor Ms. Frisby. The Rutherford County Schools staff with Ms. Frisby assistance should be commended for continuing to strive to budget accurately and place personnel efficiently within the resources available. A review of the 2023-2024 budget as of the end of November indicated there may still be potential savings. Below are two examples, however, we believe a more thorough review of certain certified job assignments may allow additional savings.

1. HIL recommends the district leadership along with the Executive Director of HR and the Chief Finance Officer review the state chart of account definitions. The state's chart of accounts allows "Master" teachers to be paid from the State Teacher Allotment PRC 001. The definition of a Master is as follows:

127 Master Teacher

A classroom teacher with significant teaching experience, is an excellent practitioner and works in the classroom with the teacher of record to implement effective teacher strategies that align to required content standards.

Rutherford County Schools has several positions coded from various dollar allotments as a Lead teacher/instructional facilitator from object code "135" that may fit the definition of a Master teacher Object Code 127. The definition for 135 is as follows:

135 Instructional Facilitators

Include the salary of curriculum specialists, instructional facilitators, literacy coaches, and instructional technology facilitators, as well as lead teachers in the summer school program.

Typically, the positions currently paid by object code "135" are experienced teachers with a master's or national board degree. We recommend HR and district leadership review the duties for the employees coded with an object 135 and if the duties meet the definition of the Master Teacher, the district could increase the purchasing power of the dollar allotments.

Example of a potential savings:

A teacher at school 342 is paid from the dollar At-Risk allotment with object code 135 at \$5,837 per month. If this teacher's duties meet the definition of a master teacher as described above the district could switch a beginning teacher paid at \$3,900 per month and be able to add back nearly \$26,000 including matching retirement and social security to the State At-Risk funds.

Since all the elementary schools are Title 1 schools, we found instances where you could also switch a high paying "facilitator" or "master" teacher with a lower paying teacher at the same school. For example, at school 336 a 20 percent position could be switched with a less experienced teacher and save the school over \$10,000 in Title 1 funds. This of course depends on the plan but with many districts, as long you are not decreasing the number of positions in total switching high paid positions to the State teacher allotment with a less experienced teacher does not comprise comparability nor is it supplanting.

2. HIL Consultants met the HR licensure specialist Thursday, December 7th to review retirement processes and answer questions since these duties are fairly new for the licensure specialist.

HIL Partner Kathy Isenhour met with the Executive Director of Human Resources. The meeting included a review of the resources and definitions for the State chart of accounts and possible competitive grant options. The discussion also included possible options for school-based allocations and how to begin the process of determining the needs for the upcoming 2024-2025 school year.

HIL appreciates the opportunity to be of service to the Rutherford County Schools and is available to assist or answer questions regarding our recommendations.

[EXTERNAL] Fwd: Rutherford Ex. Summary Draft November 2023

hhurd@hilconsultants.com Hank Hurd

Monday, November 13, 2023 at 11:39:21 AM Eastern Standard Time

To: dsutton@rcsnc.org David Sutton

Cc: kisenhour@hilconsultants.com Kathy Isenhour

Good morning Dr.Sutton,

Thanks for your time last week while we were on site at RCS.

Please look over the attached executive summary and Kathy and I will be available for Q&A at your convenience.

Best regards,

Hank Hurd, Partner

HIL, Consultants, LLC

Attachments:**RutherfordExSummaryNovember2023.pdf** 457k

Re: [EXTERNAL] Thursday 12/7

tash@rcsnc.org Tammie Ash
To: kisenhour@hilconsultants.com

Monday, December 4, 2023 at 11:57:13 AM Eastern Standard Time

Kathy,

Retirements will be the focus of this meeting. Haley is still unsure of herself and I think it would be best for us if we focus there.

Thank you!

On Mon, Dec 4, 2023 at 9:42 AM <kisenhour@hilconsultants.com> wrote:

Good morning Dr. Ash- In preparation for the meeting this Thursday, I wanted to confirm we will be discussing retirement procedures with Ms. Cobb and if there will be any other topics to be discussed regarding HR? I plan to have our expert payroll specialist with me that day and just trying to determine the agenda. Thanks so much. Kathy Isenhour

Kathy Isenhour, Partner

828-455-1478

—
Tammie Ash, Ed.D.
Executive Director of Human Resources
Rutherford County Schools
382 West Main Street | Forest City, NC 28043
Phone 828.288.2230 | Fax 828.288.2490



Attachments:

ff937ad1.png 11k

[EXTERNAL] Budget Journal Entries and Payroll Assignment Moves

debsdesigns62@gmail.com Deborah Frisby Wednesday, November 29, 2023 at 4:21:57 PM Eastern Standard Time
To: **aownbey@rcsnc.org Angie Ownbey**
Cc: **kisenhour@hilconsultants.com Kathy Isenhour**

Hi Angie,

Attached are three files, one for budget journal entries and two for payroll assignment moves. One file has multiple tabs.

Once you have these changes made, let me know and I will review the new assignment file against the allotment revisions one more time. When I come next week, we will work together to begin working on 202 moves.

We will not need to move any positions out of PRC 108 so no need to bother Dr. Silver. I shored up the following PRCs:

PRC 007, PRC 001, PRC 006, PRC 004

Also, before the November data file is pulled, you will need to move expenditures made in November for retirement adjustments in PRC 016, PRC 176 and PRC 177. I would move PRC 016 expenditures to PRC 031, I would move PRC 176 and PRC 177 expenditures to PRC 181.

At some point, we need to talk about PRC 013.

Let me know if you have any questions.

Thanks so much for your help. Have a great evening!

Attachments:

Budget Journal Entries 11.29.23.xlsx 17k

Payroll Assignments Moves 11.29.23.xlsx 15k

Payroll Assignment Moves 11.29.2023.xlsx 29k

Re: [EXTERNAL] Fwd: Retirement Samples

hcobb@rcsnc.org Haley Cobb
To: kisenhour@hilconsultants.com

Friday, November 17, 2023 at 12:56:44 PM Eastern Standard Time

Thank you so much! That makes me feel much better. Thank you, Happy Thanksgiving to you too!

Haley Cobb
Rutherford County Schools
HR Licensure/Retirement Specialist

382 West Main Street
Forest City, NC 28043

Direct Line: 828-288-2231
Fax: 828-288-2490



On Fri, Nov 17, 2023 at 12:38 PM <kisenhour@hilconsultants.com> wrote:

When you start with the retirees in January, just let me know and I will be happy to review with you. Have a wonderful Thanksgiving. Kathy

On 2023-11-17 11:40, Haley Cobb wrote:

Good morning Kathy! Almost afternoon now! Not yet. We are taking the retirees that have December 31st dates and reaching out to meet with them, to be sure they submitted the correct paperwork and everything is good so far. I know I will have questions within the next couple of weeks. I have some meetings scheduled the first week of January that I will be responsible for from start to finish. The part that terrifies me is making sure that I calculate their leave time properly. I appreciate you being so helpful!

Haley Cobb
Rutherford County Schools
HR Licensure/Retirement Specialist

382 West Main Street
Forest City, NC 28043

Direct Line: 828-288-2231
Fax: 828-288-2490



On Fri, Nov 17, 2023 at 9:23 AM <kisenhour@hilconsultants.com> wrote:

Good morning Haley- I hope you have had a good week. I am checking to see if you have any follow-up questions regarding retirement applications and/or processing. Feel free to reach out if we can be of assistance.

Kathy Isenhour

On 2023-11-09 15:03, Haley Cobb wrote:

Thank you so much! I truly appreciate your help!

Haley Cobb
Rutherford County Schools
HR Licensure/Retirement Specialist

382 West Main Street
Forest City, NC 28043

Direct Line: 828-288-2231
Fax: 828-288-2490



On Thu, Nov 9, 2023 at 12:11 PM <kisenhour@hilconsultants.com> wrote:

----- Original Message -----

Subject: Retirement Samples**Date:** 2023-11-09 09:24**From:** Kathy Carpenter <carpenterkat@hickoryschools.net>**To:** kisenhour@hilconsultants.com

Hey,

I am sending two I did recently....as 12 month and a 10 month. I am sorry so messy but I included my working documents. I take the leave balance and divide by the number of hours to get the daily leave balance.

If this is too messy and you are ashamed to show it, let me know and I can re-do one. If you are working on one in particular, I am happy to talk by phone today as well.

Thanks,

--

Kathy Carpenter

Payroll Specialist

432 4th Ave SW

Hickory, NC 28602

828-322-2855 ext 237

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Re: [EXTERNAL] Re: W-9 and Vendor Application

jemorris@rcsnc.org John Morris
To: kisenhour@hilconsultants.com
Cc: caseyb@rcsnc.org Casey Brown

Monday, November 13, 2023 at 3:20:41 PM Eastern Standard Time

Good Afternoon,

I have attached the word doc vendor application.

Thank you,

John Morris
Junior Accountant
Rutherford County Schools
382 West Main Street
Forest City, NC 28043
(828) 288-2330 (Direct)

On Mon, Nov 13, 2023 at 3:12 PM <kisenhour@hilconsultants.com> wrote:

Hi John- Do you have the vendor application form in a word document that we may complete online? Also attached is the HIL W9. thanks so much. Kathy

On 2023-11-13 14:44, John Morris wrote:

Good Afternoon,

I am reaching out as we have not received the HILS Consulting Groups vendor application and w-9. I have attached a digital copy to be completed. Once you have this completed, if you would kindly send it back so that we may get it entered into our system. If you have any questions or concerns please let me know.

Thank you,

John Morris
Junior Accountant
Rutherford County Schools
382 West Main Street
Forest City, NC 28043
(828) 288-2330 (Direct)

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All e-mail correspondence to and from this address is subject to the North Carolina Public Records Law, which may result in monitoring and disclosure to third parties, including law enforcement.

Attachments:

RCS VENDOR APPLICATION Rev. 5-23.docx 25k

2

[EXTERNAL] Master Teacher coding recommendations

hhurd@hilconsultants.com Hank Hurd
To: dsutton@rcsnc.org David Sutton
Cc: kisenhour@hilconsultants.com Kathy Isenhour

Friday, November 10, 2023 at 2:07:08 PM Eastern Standard Time

Good afternoon Dr. Sutton,
FYI

We had a great series of interviews yesterday with members of your leadership team as we work through our engagement identifying efficiencies within RCS.

The follow up email below from Kathy to Dr. Silver is a recommendation that will save RCS a significant amount of funds. It will be also be included in our upcoming written report.

Best regards,
Hank Hurd, Partner
HIL, Consultants, LLC

From: kisenhour@hilconsultants.com
Date: November 9, 2023 at 2:31:01 PM EST
To: ksilver@rcsnc.org
Cc: Hank Hurd <hhurd@hilconsultants.com>
Subject: Master Teacher

Good afternoon Dr. Silver- Hank and I appreciate your taking time to speak with us this morning. One of our discussions centered around you having 3 instructional facilitators servicing Title 1 elementary schools. Below is a code the state will allow for master teachers from the State teacher allocations. If you believe these positions meet the criteria listed below, we may be able to help the district as a whole and enable additional Title 1 funds to be redirected to the elementary schools. We will be happy to discuss further if you decide this something you might be interested in as we begin to do a deeper dive into the budgets of RCS in the coming weeks and months.

Again, thank you for your time today.

Kathy Isenhour, Partner

State definition for a Master Teacher Object Code 127

127 Master Teacher

A classroom teacher with significant teaching experience, are excellent practitioners and work in the classroom with the teacher of record to implement effective teacher strategies that align to required content standards.

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Attachments:

592c7442.png 11k

[EXTERNAL] 2023-24 Budget Documents for Board Packet

debsdesigns62@gmail.com Deborah Frisby Wednesday, November 8, 2023 at 4:25:23 PM Eastern Standard Time
To: dsutton@rcsnc.org David Sutton
Cc: kisenhour@hilconsultants.com Kathy Isenhour, debsdesigns62@gmail.com Deborah Frisby

Good afternoon! Thanks for taking the time to meet with me and finalize the budget information for the Board packet.

The following is attached"

2023-24 Beginning Budget Resolution
2023-24 Budget Overview-Will have to print each tab if you need a hard copy
Sample Letters of Transmittal
2023-24 Budget Talking Points

Let me know if you have any questions. On another note, what time is the Board meeting on Tuesday and what time should I be there?

Thanks so much! Have a great evening!

Attachments:

2023-24 RCS Beginning Budget Resolution.pdf 126k
2023-2024 Budget Report with narrative 11.8.2023 Final.xlsx 52k
Sample Letter of Transmittal 2.pdf 52k
Sample Letter of Transmittal 1.pdf 338k
Talking Points for Budget Transmittal Letter 11.8.2023.docx 15k

Charter School ADM

jemorris@rcsnc.org John Morris
To: kisenhour@hilconsultants.com

Wednesday, November 8, 2023 at 11:16:14 AM Eastern Standard Time

Good Afternoon,

Please see the attached spreadsheets for Charter Schools as requested. I have compiled the last 6 years ADM for reference. I know we spoke about the possibility of increase in Charter School counts since Covid, so I actually included the PreCovid School year FY 2019(2018-2019). To see the compiled ADM, please open the ADM FY19-FY24, each worksheet is labeled.

I hope this is of assistance to you. Should you have any questions or need any additional information, please let me know and I will work on gathering the necessary information.

Thank you,

John Morris
Junior Accountant
Rutherford County Schools
382 West Main Street
Forest City, NC 28043
(828) 288-2330 (Direct)

Attachments:

2018-2019 Charter Local Current Expense Fund Distribution (14).xlsx 32k
2019-2020 Charter Local Current Expense Fund Distribution June.xlsx 33k
2022-2023 Charter Local Current Expense Fund Distribution.xlsx 30k
2020-2021 Charter Local Current Expense Fund Distribution (10).xlsx 29k
ADM FY19-FY24.xlsx 24k
2023-2024 Charter Local Current Expense Fund Distribution.xlsx 30k
2021-2022 Charter Local Current Expense Fund Distribution (12).xlsx 29k

Re: [EXTERNAL] Rutherford visit

dsutton@rcsnc.org David Sutton

Wednesday, November 8, 2023 at 7:24:45 AM Eastern Standard Time

To: kisenhour@hilconsultants.com

Cc: hhurd@hilconsultants.com Hank Hurd

Thanks very much! I've shared the appointment time with Kim. If I can otherwise be of help, please don't hesitate to let me know.

David M. Sutton, Ed.D.

Superintendent

Rutherford County Schools

382 West Main Street | Forest City, NC 28043

Phone 828.288.2200 | Fax 828.288.2490

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Sent from my iPhone

On Nov 7, 2023, at 9:35 PM, kisenhour@hilconsultants.com wrote:

Good evening Dr. Sutton- We are happy to add Ms Carpenter, CTO to our list of interviews. We are speaking with Dr. Ash regarding her role in HR tomorrow afternoon at 2:30 and since she was the previous EC Director we definitely welcome and will value her information when we meet with Ms Alcorn.

The selection of the four individuals was based on solely on program and department administrators that typically manage the largest budgets in school districts. Our intent was to discuss how they receive their budget information, if information is timely from finance, and who historically monitored the budgets throughout the year. Please let Ms. Carpenter know we would like to meet with her at 11:30 as this was an oversight. We will also be happy to speak anyone else you believe would have information helpful to us as we prepare our report.

We look forward to seeing tomorrow. I will be arriving tomorrow mid-morning and Hank will be arriving around 1:00 p.m.

Thank you, Kathy

On 2023-11-07 16:28, David Sutton wrote:

I have checked schedules with the individuals you'd like to interview on Thursday, and I think we can accomplish that task with just a little reshuffling to work around some conflicts. Based on availability, I would recommend this schedule:

- **9:00 AM** | Keith Silver, Federal Programs
- **9:45 AM** | Brad Teague, Chief Operating Officer
- **10:30 AM** | Michelle Alcorn, Exceptional Children
- **11:00 AM** | Renee Collins, Assistant Superintendent

I want to share a related suggestion, and a question, if I may.

Suggestion: Michelle Alcorn has only held her current role for a couple of months, and will have very little experiential background useful to your interview. I would suggest that Tammie Ash join Michelle for the interview. Tammie is currently our human resources director, but she was our Exceptional Children program director before moving into her current role, and she will have much more perspective to share with you.

Question: How did you arrive at this particular group of individuals? Kim Carpenter, our chief technology officer, is not included, but holds a position parallel to Renee Collins and Brad Teague. Since I'm not sure about your selection strategy, I don't know if her exclusion was purposeful or inadvertent. Kim is available until 12:00 Noon on Thursday, and would likely make a helpful addition to the group.

Thanks again, and have a good afternoon.

David M. Sutton, Ed.D.
Superintendent
Rutherford County Schools
382 West Main Street | Forest City, NC 28043
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On Fri, Nov 3, 2023 at 9:53 AM David Sutton <dsutton@rcsnc.org> wrote:

Good morning, and thanks for the update. I appreciate the work you're doing and look forward to your analysis and recommendations. As an aside, I am also incredibly grateful for Deborah Frisby's work -- she continues to be a tremendous asset to us.

The plans and timetable you described sound good to me. It will likely be Monday before I can specifically confirm the times for the individuals you'd like to interview next Thursday. Some are away on business today, and others are out with illness, but I will connect with them all on Monday and follow up with you then.

As for me, I will be in Asheville until around 2:30 PM on Thursday, so I won't be here to talk with you at 11:30 AM that morning. While we would obviously lack the benefit of Thursday's interviews given the timing, I would be happy to spend any amount of time with you that would be helpful on Wednesday. Notwithstanding some commitments during the morning and afternoon, I'll be in the office and happy to talk at your convenience any time between 9:30 AM and 2:30 PM that day.

Thanks again, and have a good weekend.

David M. Sutton, Ed.D.
Superintendent
Rutherford County Schools
382 West Main Street | Forest City, NC 28043
Phone 828.288.2200 | Fax 828.288.2490

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On Fri, Nov 3, 2023 at 8:28 AM Hank Hurd <hhurd@hilconsultants.com> wrote:

Good morning Dr. Sutton- I want to give you an update since we last met and let you know Kathy and I plan to be onsite next week. We have reviewed multi-year budgets and audits. In addition, we have been in discussion weekly with Deborah Frisby regarding the 2023-2024 budget cycle

and funding sources for personnel. We will be onsite next Wednesday afternoon to review final budget preparations with Deborah. We are also scheduled to meet with Dr. Ash Wednesday at 2:30.

Our goal is to give to you our written recommendations and best practices going forward to prevent exceeding the local resources in the next few weeks. I am attaching a tentative agenda of four staff we would like to interview next Thursday morning. Our purpose for the interviews is to determine first hand what if any budget information they are receiving and what has been past practices in order to complete our report.

Please confirm if this tentative schedule meets your approval and if your administrative assistant could confirm these four individuals will be available.

I look forward to seeing you next week. Please feel free to contact me if you have questions or would like to discuss further.

Best Regards,
Hank

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Re: [EXTERNAL] 504

kisenhour@hilconsultants.com
To: aownbey@rcsnc.org Angie Ownbey

Monday, November 6, 2023 at 11:26:25 AM Eastern Standard Time

Thanks Angie- This makes sense. Kathy

On 2023-11-06 11:22, Angie Ownbey wrote:

Good morning,

The Dogwood Grant stayed in PRC 504. It was moved to the deferred revenue account for PRC 504 in June. I have attached the account history for the accounts to show it was not moved into 001 last year. Also, I have attached the account history showing where we reversed the deferred revenue to show in this fiscal year in 504

Please let me know if you need any other information.

On Mon, Nov 6, 2023 at 9:05 AM <kisenhour@hilconsultants.com> wrote:

Hi Angie- I just looked at last year's budget and it appears RCS received \$225,000 for the Dogwood Grant during the year and then it was moved out into 001 to pay for going over budget for teachers that were moved into Fund 8 late in the year. It is my understanding the Dogwood Grant is a restrictive grant and these funds need to stay with the Grant.

I suggest leave it until Wednesday when Deborah and I can look at where it needs to be budgeted. Thanks, Kathy

—
Angie Ownbey
Interim Finance Officer
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382 West Main St
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828-288-2246 phone
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Re: [EXTERNAL] Fund 8 Budget

aownbey@rcsnc.org Angie Ownbey
To: kisenhour@hilconsultants.com

Friday, November 3, 2023 at 4:55:08 PM Eastern Daylight Time

Yes, the 225,000 was remaining as of June 30th. The playgrounds were all paid from 001 but 225,000 was to be paid from 504 since this was the purpose of the grant. The journal has not been done to move this expense.

On Fri, Nov 3, 2023 at 4:43 PM <kisenhour@hilconsultants.com> wrote:

Hi Angie- I want to make sure I understand what you are asking. You have \$225,000 left as of June 30 and you need to rebudget. If this is correct, I would suggest you keep the carryover in PRC 504 where it originated. I think the hope is that you will not to move teachers into 001. Let me know if I have misunderstood your question. Thanks, Kathy

On 2023-11-03 15:43, Angie Ownbey wrote:

Question - PRC 504 - We have the carryover of 225,000 which was spent this year. The expense is in 001. Can I show the 225,000 as revenue?

On Fri, Nov 3, 2023 at 3:40 PM <kisenhour@hilconsultants.com> wrote:

Okay sounds good.

On 2023-11-03 15:37, Angie Ownbey wrote:

I was just talking with Deborah on this. I was going to make some adjustments in some that were over budget. Example PRC 514, we should get 10,000 more from the Foundation. I will make notes so we can look at Wednesday.

On Fri, Nov 3, 2023 at 3:33 PM <kisenhour@hilconsultants.com> wrote:

Hi Angie- I am following up to see if you need me to assist you anything else regarding Fund 8?

I hope you have a good weekend. Kathy

--

Angie Ownbey
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--

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Fwd: [EXTERNAL] 2023-24 Proposed Local Budget

aownbey@rcsnc.org Angie Ownbey
To: jemorris@rcsnc.org John Morris

Friday, November 3, 2023 at 12:56:11 PM Eastern Daylight Time

Please enter the attached local budget. Each PRC has a tab
Thanks

----- Forwarded message -----

From: **Deborah Frisby** <debsdesigns62@gmail.com>

Date: Fri, Nov 3, 2023 at 11:16 AM

Subject: [EXTERNAL] 2023-24 Proposed Local Budget

To: Angie Ownbey <aownbey@rcsnc.org>

Cc: Kathy Isenhour <kisenhour@hilconsultants.com>, Deborah Frisby <debsdesigns62@gmail.com>

Hi Angie,

Attached is the 2023-24 Proposed Local budget. The budget totals \$16,980,820.

The revenue codes will be as follows:

2.4110. Local Appropriation	\$ 16,655,820
2.4410 Fines and Forfeitures	\$ <u>325,000</u>
Total	\$16,980,820

Per our telephone conversation, I had to cut \$882,000 from what I calculated as actual cost and historical spending.....



Once the beginning budget is approved, we will do a deep drive into State and local and move some costs to state.

Please review carefully. We can discuss in greater detail next week. Thanks so much! Have a great today and weekend!

I will send capital outlay here shortly!

P.S. Below is a comparison from last year to this year's budget.

	2023-24	2022-23
PRC 001	\$166,390.00	\$1,520,000.00
PRC 002	\$886,658.00	\$960,000.00
PRC 003	\$791,049.00	\$1,655,650.00
PRC 005	\$1,046,665.00	\$1,010,170.00
PRC 007	\$374,203.00	\$1,710,000.00
PRC 009	\$1,580,200.00	\$1,590,000.00
PRC 028	\$50,000.00	\$50,000.00
PRC 036	\$2,584,080.00	\$2,425,000.00
PRC 039	\$847,116.00	\$780,000.00
PRC 056	\$209,319.00	\$240,000.00
PRC 061	\$953,000.00	\$953,000.00
PRC 801	\$1,709,881.00	\$1,680,000.00

PRC 802	\$5,129,528.00	\$5,030,000.00
PRC 882	\$157,731.00	\$150,000.00
PRC 884	\$475,000.00	\$455,000.00
PRC 885	\$20,000.00	\$17,000.00

	\$16,980,820.00	\$20,225,820.00	\$3,245,000.00	cut in 2023-24
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\$20,156,052.05 spent 2022-23

2023-24	
Revenue	\$16,655,820.00
F & F	\$325,000.00
	\$16,980,820.00

—
Angie Ownbey
Interim Finance Officer
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Attachments:

2023-24 Proposed Local Budget 11.3.2023.xlsx 136k

[EXTERNAL] 2023-24 Proposed Capital Outlay Budget

debsdesigns62@gmail.com Deborah Frisby

Friday, November 3, 2023 at 11:31:00 AM Eastern Daylight Time

To: aownbey@rcsnc.org Angie Ownbey, kisenhour@hilconsultants.com Kathy Isenhour

Cc: debsdesigns62@gmail.com Deborah Frisby

Me again. Attached is the proposed capital outlay budget. Per a conversation with Dr. Sytton yesterday, we are only budgeting \$1,000,000 at this time.

Let me know if you have any questions. Thanks for your help!

Attachments:**2023-24 Proposed Capital Outlay BB 11.3.2023.xlsx** 16k

[EXTERNAL] Fund 8 Budget

kisenhour@hilconsultants.com

Monday, October 23, 2023 at 5:03:24 PM Eastern Daylight Time

To: aownbey@rcsnc.org Angie Ownbey

Cc: debsdesigns62@gmail.com Deborah Frisby

Hi Angie- I am attaching the spreadsheets for the Fund 8 budget. I know there will changes before it is finalized but tried to get you something to start. Each PRC is a separate tab from PRC 001 to PRC 928. I made notes on various PRCs if it was over budget or if I needed more information. I based the budget on actual revenues received last year to prevent going over budget in some cases. Last year's budget has several PRCs that were in the deficit by the end of the year.

The proposed budgets to enter are highlighted in gray in the last column. I know it will take you some time to enter the budget and no rush. I will be at a conference Wednesday-Friday this week so I will pick back up next week. Feel free to email or call if you have questions. Thanks so much. Kathy

Attachments:**RCSdraft.Fund8Budget2024.xlsx** 190k

[EXTERNAL] 2023-24 Fund 1 Proposed Budget

debsdesigns62@gmail.com Deborah Frisby

Sunday, October 29, 2023 at 4:30:28 PM Eastern Daylight Time

To: aownbey@rcsnc.org Angie Ownbey

Cc: kisenhour@hilconsultants.com Kathy Isenhour, debsdesigns62@gmail.com Deborah Frisby

Hi Angie,

I hope you are enjoying your weekend and this beautiful weather!!!

I have attached the spreadsheet for the Fund 1 budget. The tabs are by PRC and the budget amounts to enter are highlighted in blue in the last column. I followed the same process as Kathy did on Fund 8. There are notes for some PRCs as well. I kept a count of the positions to tie everything back to the current payroll assignments, which is what I used for budgeting purposes.

I was not sure about where to budget the funds in PRC 039 and PRC 064, so I looked at the budget from last year and just used those codes as placeholders.

There will be some tweaking to do on a few PRCs but this will get the beginning budget posted. This budget covers through allotment revision #010.

The total state budget should equal \$58,499,739 which ties back to the total for all State PRCs on revision #010.

Please reach out if you have any questions. Thanks so much! Have a great evening!

Attachments:**2023-24 Proposed State Budget 10.29.2023.xlsx 175k**

Re: [EXTERNAL] Gearup

aownbey@rcsnc.org Angie Ownbey
To: kisenhour@hilconsultants.com

Monday, October 23, 2023 at 2:39:53 PM Eastern Daylight Time

Yes, we have two. They are paid from 8.6110.311.153.810.000.00. I do have the budget from Gear Up. I need to add the carryover amount to it.

On Mon, Oct 23, 2023 at 2:18 PM <kisenhour@hilconsultants.com> wrote:

Hi Angie- Do you still have administrative specialist for Gearup PRC 311 and if so what is the salary and the code? I see that personnel was paid from this grant last year but I do not see them on the assignment listing.
Thanks, Kathy

—
Angie Ownbey
Interim Finance Officer
Rutherford County Schools
382 West Main St
Forest City, NC 28043
828-288-2246 phone
828-288-2490 fax
aownbey@rcsnc.org

[EXTERNAL] Fund 8 questions

kisenhour@hilconsultants.com

Monday, October 23, 2023 at 12:53:53 PM Eastern Daylight Time

To: aownbey@rcsnc.org Angie Ownbey

Cc: debsdesigns62@gmail.com Deborah Frisby

Hi Angie- Here are a couple of questions regarding the Fund 8 budget

1. Under PRC 061- Revenues say Textbooks revenue- Did Rutherford write a check from State to local Fund 8 to allocate funds out to the schools?
2. Under PRC 514 -There is a revenue code for Duke Energy Smart Saver with no revenues posted but the revenues were posted under PRC 548 for last year. I will budget under it under PRC 548 for the current year.
3. Do you anticipate receiving \$15,000 again this year for the Homeless outreach in addition to the \$250 that was carried over in PRC 514? I see you have collected \$5,000 so far.
4. PRC 615- I assume the \$250,000 nurses grant is reoccurring.
5. PRC 810- Do you know how much of the \$365,858 needs to be split between software and equipment? If not I will the majority in equipment and you can transfer between the codes as needed.

That's all for now. Thanks, Kathy

Re: [EXTERNAL] Fund 8

aownbey@rcsnc.org Angie Ownbey

Monday, October 23, 2023 at 10:56:07 AM Eastern Daylight Time

To: kisenhour@hilconsultants.com

Cc: debsdesigns62@gmail.com Deborah Frisby

Good morning,

Payroll went well on Friday. Now we can get ready to process the retro pay. I will move forward on entering these budgets. Yes, I did sign up to listen to the webinar.

Thank you

On Mon, Oct 23, 2023 at 10:07 AM <kisenhour@hilconsultants.com> wrote:

Good morning Angie- I hope your payroll went well on Friday and you were able to have an enjoyable weekend.

Yes when you have time, if you could go ahead and enter the SN budget and Fund 8 PRC 504. I will be sending you Fund 8 to enter as I continue to go through and analyze 2023 versus 2024.

Also, I didn't know if you were going to listen to the webinar this afternoon at 2:30 from the State Treasurer's office regarding the wiring of cash for 202 BUD adjustments. I plan to listen in and I am sure there will follow-up in writing after the webinar.

I hope your week goes well.

Thanks,

Kathy

On 2023-10-20 17:21, Angie Ownbey wrote:

PRC 504 Dogwood Health Grant - I have attached the budget amendment for the 225,000. This shows how it was allocated. The 169,316 is a new grant that is for CTE. CTE will be receiving an additional 180,000. I did request a budget from them when we received the money. I will follow up with them.

I requested the School Nutrition budget from Mr. Teague. He said Heidi did the budget. I have attached the budget I found. Do you want me to enter this?

On Wed, Oct 18, 2023 at 3:08 PM <kisenhour@hilconsultants.com> wrote:

Hi Angie- I will work on Fund 8 back in my office where I can compare last year to this year's budget and add to the PRCs with deferred revenues.

I will probably have some questions as I progress through the PRCs.

PRC 504 Dogwood Health Grant. Nothing was spent last year so the full \$225,000 is carried forward and additional revenues have been received this year. It goes to 4 schools but I will need to know how much to allocate of the new year funds.

Also, when you have time if you can tell which PRCs will not be receiving additional revenues in 2024 FY. I am assuming the smaller PRCs will expire when all the funds are expensed.

Thanks so much for all your assistance.

Kathy

--
Angie Ownbey
Interim Finance Officer
Rutherford County Schools
382 West Main St
Forest City, NC 28043
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--
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aownbey@rcsnc.org

[EXTERNAL] Re: Allotments

debsdesigns62@gmail.com Deborah Frisby

Wednesday, October 18, 2023 at 3:00:33 PM Eastern Daylight Time

To: aownbey@rcsnc.org Angie Ownbey

Cc: kisenhour@hilconsultants.com Kathy Isenhour

Thank you!

On Wed, Oct 18, 2023 at 2:58 PM Angie Ownbey <aownbey@rcsnc.org> wrote:
attached

--

Angie Ownbey
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Spreadsheets

aownbey@rcsnc.org Angie Ownbey

Wednesday, October 18, 2023 at 2:01:24 PM Eastern Daylight Time

To: kisenhour@hilconsultants.com Kathy Isenhour, debsdesigns62@gmail.com Deborah Frisby

I have attached the requested spreadsheets.

 Liabilities FY23.xlsm

--

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828-288-2246 phone
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aownbey@rcsnc.org

Attachments:

Revenue Expense FY24.xlsm 7.4M

Re: [EXTERNAL] Tomorrow's meeting

dsutton@rcsnc.org David Sutton

To: kisenhour@hilconsultants.com

Cc: hhurd@hilconsultants.com Hank Hurd

Wednesday, October 18, 2023 at 7:17:40 AM Eastern Daylight Time

Excellent. I look forward to your joining us for our meeting. See you later this morning!

David M. Sutton, Ed.D.

Superintendent

Rutherford County Schools

382 West Main Street | Forest City, NC 28043

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On Oct 17, 2023, at 6:14 PM, kisenhour@hilconsultants.com wrote:

Good evening Dr. Sutton- I wanted to let you know I will be onsite tomorrow with Deborah Frisby.

I understand from Deborah a meeting is scheduled with you at 10:00 to discuss budget recommendations which is timely since we just received an email that DPI is planning to email the initial state allotments to districts by noon tomorrow.

Kathy

Kathy Isenhour, Partner

Hurd, Isenhour, Lopes, LLC

Re: [EXTERNAL] Interview Questions Round 2

kisenhour@hilconsultants.com
To: dsutton@rcsnc.org David Sutton
Cc: hhurd@hilconsultants.com Hank Hurd

Monday, October 16, 2023 at 3:08:32 PM Eastern Daylight Time

Waiting to be admitted.

On 2023-10-16 15:05, David Sutton wrote:

If the three of us could rejoin the session, we can debrief for a few minutes together.

David M. Sutton, Ed.D.

Superintendent

Rutherford County Schools

382 West Main Street | Forest City, NC 28043

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On Mon, Oct 16, 2023 at 3:02 PM <kisenhour@hilconsultants.com> wrote:

Are we continuing to zoom?

On 2023-10-16 12:57, David Sutton wrote:

That approach sounds great to me. See you online.

David M. Sutton, Ed.D.

Superintendent

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382 West Main Street | Forest City, NC 28043

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On Mon, Oct 16, 2023 at 12:56 PM Hank Hurd <hhurd@hilconsultants.com> wrote:

Good afternoon David,

It's totally your call but usually after you introduce Kathy and I we will ask the questions with your permission.

After we finish you can close out the call by asking if they have any further questions?

This is just our recommendations!

Thanks so much

Sent from my iPhone

On Oct 16, 2023, at 12:15 PM, David Sutton <dsutton@rcsnc.org> wrote:

Thank you! For my own clarity, will the two of you take the lead role in posing these questions to the candidates, or do we need to do that on our end? In other words, are you actively interviewing them, or are you observing their interviews? We can take either approach - I just want to be sure I understand the approach before we get started this afternoon.

David M. Sutton, Ed.D.
Superintendent
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Phone 828.288.2200 | Fax 828.288.2490

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On Mon, Oct 16, 2023 at 10:11 AM <kisenhour@hilconsultants.com> wrote:

Dr. Sutton- Good morning. Please find attached the questions for the interviews this afternoon. Hank and I will follow up after the interviews with our assessments.

Best regards,

Kathy

*Kathy Isenhour, Partner
Hurd, Isenhour, Lopes, LLC*

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Fwd: [EXTERNAL] Interview Questions Round 2

dsutton@rcsnc.org David Sutton

Monday, October 16, 2023 at 12:59:41 PM Eastern Daylight Time

To: tash@rcsnc.org Tammie Ash, reneec@rcsnc.org Renee Collins

FYI, Hank and Kathy will ask the questions they have provided. See you online.

David M. Sutton, Ed.D.

Superintendent

Rutherford County Schools

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----- Forwarded message -----

From: **David Sutton** <dsutton@rcsnc.org>

Date: Mon, Oct 16, 2023 at 12:16 PM

Subject: Fwd: [EXTERNAL] Interview Questions Round 2

To: Tammie Ash <tash@rcsnc.org>, Renee Collins <reneec@rcsnc.org>

FYI, I've replied to ask for clarity about their exact role in today's interviews -- namely, whether they're asking these questions or we are.

David M. Sutton, Ed.D.

Superintendent

Rutherford County Schools

382 West Main Street | Forest City, NC 28043

Phone 828.288.2200 | Fax 828.288.2490

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----- Forwarded message -----

From: <kisenhour@hilconsultants.com>

Date: Mon, Oct 16, 2023 at 10:11 AM

Subject: [EXTERNAL] Interview Questions Round 2

To: Hank Hurd <hhurd@hilconsultants.com>, David Sutton <dsutton@rcsnc.org>

Dr. Sutton- Good morning. Please find attached the questions for the interviews this afternoon. Hank and I will follow up after the interviews with our assessments.

Best regards,

Kathy

Kathy Isenhour, Partner

Hurd, Isenhour, Lopes, LLC

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Attachments:

Finance Officer Interview Questions Round 2-Rutherford.docx 29k

[EXTERNAL] Re: Fwd: Your scan (Scan to My Email)

kisenhour@hilconsultants.com

To: tash@rcsnc.org Tammie Ash

Monday, October 16, 2023 at 11:31:16 AM Eastern Daylight Time

Thank you.

On 2023-10-16 11:21, Tammie Ash wrote:

Both resumes for today's interviews are attached. My apologies that you did not have these sooner.

--

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--

Tammie Ash, Ed.D.
Executive Director of Human Resources
Rutherford County Schools
382 West Main Street | Forest City, NC 28043
Phone 828.288.2350 | Fax 828.288.2490

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Re: [EXTERNAL] Interviews

tash@rcsnc.org Tammie Ash
To: kisenhour@hilconsultants.com

Monday, October 16, 2023 at 11:15:58 AM Eastern Daylight Time

Of course, I will send both to you asap.

On Mon, Oct 16, 2023 at 11:14 AM <kisenhour@hilconsultants.com> wrote:

Good morning Tammie- Would it be possible to get a copy of the candidates' resumes before the interviews this afternoon. If I missed an earlier email with resumes I apologize.

Thank you,

Kathy Isenhour

Kathy Isenhour, Partner

Hurd, Isenhour, Lopes, LLC

—

Tammie Ash, Ed.D.
Executive Director of Human Resources
Rutherford County Schools
382 West Main Street | Forest City, NC 28043
Phone 828.288.2350 | Fax 828.288.2490

Re: [EXTERNAL] Payroll Assignment Moves - Phase 3

debsdesigns62@gmail.com Deborah Frisby
To: aownbey@rcsnc.org Angie Ownbey

Thursday, October 12, 2023 at 1:51:36 PM Eastern Daylight Time

You may have to print/screen shot each page before you submit. I cannot remember if you have the option to print after submission. Thanks!

On Thu, Oct 12, 2023 at 12:50 PM Angie Ownbey <aownbey@rcsnc.org> wrote:

I am getting ready to send it to him shortly. I noticed that I will need to complete the survey. Do you know if I can fill in the blanks and it will save before submitting? I know he will want to see it too

Thanks

On Thu, Oct 12, 2023 at 12:08 PM Deborah Frisby <debsdesigns62@gmail.com> wrote:

Good afternoon! Thanks so much! Has Dr. Sutton reviewed the Charter School Report yet?

On Thu, Oct 12, 2023 at 12:04 PM Angie Ownbey <aownbey@rcsnc.org> wrote:

Here is the new payroll assignment sheet after Phase 3 changes.

Thanks

On Wed, Oct 11, 2023 at 12:55 PM Deborah Frisby <debsdesigns62@gmail.com> wrote:

Hi Angie,

Attached is a spreadsheet for Phase 3.

Once you have made these changes, please send my a new payroll assignment file.

Thanks so much!

--

Angie Ownbey
Interim Finance Officer
Rutherford County Schools
382 West Main St
Forest City, NC 28043
828-288-2246 phone
828-288-2490 fax
aownbey@rcsnc.org

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--

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Re: [EXTERNAL] Payroll Assignments-Phase 2

debsdesigns62@gmail.com Deborah Frisby
To: aownbey@rcsnc.org Angie Ownbey
Cc: kisenhour@hilconsultants.com Kathy Isenhour

Tuesday, October 10, 2023 at 11:19:16 AM Eastern Daylight Time

Good morning! Thanks so much for the revised payroll assignment file and clarity on the other questions I had. I will review again this evening.

I look forward to seeing you tomorrow. Have a great day!

On Tue, Oct 10, 2023 at 10:28 AM Angie Ownbey <aownbey@rcsnc.org> wrote:
Good morning,

I have attached the updated payroll assignment list.

CTE months - Dr. Freeman and Dr Collins knew we would be over. They have a google document to where to move the overage. Their plan is to move 13.33 months to 014 and 10 months to 017 and 10 months is reported as 181. His total position account is 403.33. I did find where 2.50 months was in this budget and should not be.

ESSER 181 - They want lower paid teachers (classroom and media) moved into 181. We need to move 110-120 teacher positions into 181 to equal 4.5 million dollars. The plan was to move low paid teachers from Fund 2, 8 and 1.

See you tomorrow.

On Mon, Oct 9, 2023 at 12:42 PM Deborah Frisby <debsdesigns62@gmail.com> wrote:
Hi everyone! I hope each of you had a great weekend.

I have attached another spreadsheet for payroll assignment changes. These assignment changes should "sure up" PRC 007 (for the time being knowing that some of these will move to PRC 006), and PRC 004. There are some remaining positions in State PRC 001 but I wanted to ask some questions first.

- There are 410 months of payroll assignments for PRC 013. RCS only has 370 months available. Have you paid for CTE months from another funding source in the past?
- What is the target for funding certified positions out of PRC 181? Will we need to use PRC 181 for additional non-certified positions that may not be fully funded by state dollars? Is this an option? (I think PRC 027 may be over based on current assignments)
- Is there flexibility to use PRC 181 for certified positions being paid from state dollar allotments?

Thanks in advance for the guidance. I will continue to work on PRC 001 and PRC 181.

Please send me an updated payroll assignment file once these changes are made. Thanks so much!

Let me know if you have any questions or concerns. Have a great afternoon.

--
Angie Ownbey
Interim Finance Officer
Rutherford County Schools

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aownbey@rcsnc.org

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Re: [EXTERNAL] Bump

debsdesigns62@gmail.com Deborah Frisby

Friday, October 6, 2023 at 3:50:48 PM Eastern Daylight Time

To: aownbey@rcsnc.org Angie Ownbey

Cc: kisenhour@hilconsultants.com Kathy Isenhour

Awesome! I will review again over the weekend and start with phase 2.

Have a great weekend!

Sent from my iPhone

On Oct 6, 2023, at 3:48 PM, Angie Ownbey <aownbey@rcsnc.org> wrote:

I didn't make any changes in the payroll file on the tab label PRC001- Fund 8. I noticed that the pay grade and step didn't match what was in our system. Dale Kelly is M10(before bump). The spreadsheet shows A0. All of them were wrong. I was told to keep EC in 001 or 032 by Heidi. I didn't move Rupert to 181, I put her in 032. I can change if needed.

The following were not moved due to expired or no license.

Jordan Cuthbertson

Rachel Camp

Bailee Harris

Riley Wheat

Also, I have attached a payroll assignment list after the changes.

Have a great weekend.

On Fri, Oct 6, 2023 at 11:57 AM Angie Ownbey <aownbey@rcsnc.org> wrote:

Great. I will work on getting these changed so you may have a new assignment list.

On Fri, Oct 6, 2023 at 9:34 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:

Good morning Angie! Happy Friday!

I have attached several spreadsheets for payroll assignment changes per our discussion Wednesday. Since there are a lot of changes to make, I decided to do this in phases.

I tried my best to color code the changes! For moves to Federal PRC 181, I filtered the payroll assignments for middle schools and high schools only to maintain comparability. Once you have these changes made, please email me a new payroll assignment file and I will work on phase 2.

Please note, the pay assignment structure is different for your ROTC instructor. I moved him to an A 21 on the new pay scale (please verify in case he didn't work enough days to receive a bump). I moved part of his salary to State PRC 001 and the rest to Fund 8. There is a separate tab for this.

For the Fund 2 and Fund 8 teacher moves, we will need to make sure these teachers meet licensure requirements.

Let me know if you have any questions. Have a great day!

On Thu, Oct 5, 2023 at 4:32 PM Deborah Frisby <debsdesigns62@gmail.com> wrote:
Okay thanks so much!

On Thu, Oct 5, 2023 at 4:31 PM Angie Ownbey <aownbey@rcsnc.org> wrote:
The list you have does not reflect the bump. We did it today.

On Thu, Oct 5, 2023 at 4:26 PM Deborah Frisby <debsdesigns62@gmail.com> wrote:
Hi Angie,

I hope you are having a wonderful Thursday! I enjoyed meeting the Finance Team yesterday and look forward to working with you and the team.

I am working on your payroll assignment shifts and thought of a question. Did you all go ahead and "Bump" your certified employees? I think NCDPI sent out a communication in the August 18th Newsletter about the bump. LINQ also sent out a communication. I think LEAs had the choice to bump or not bump.

Please let me know if you have any questions and reach out if you need anything.

Have a great evening!

--

Angie Ownbey
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--

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--
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<Payroll Assignments 10 6 23.xlsx>

Finance Officer Interviews | Second Round

dsutton@rcsnc.org David Sutton

Thursday, October 5, 2023 at 12:41:57 PM Eastern Daylight Time

To: tash@rcsnc.org Tammie Ash

Cc: reneec@rcsnc.org Renee Collins, kisenhour@hilconsultants.com, hhurd@hilconsultants.com Hank Hurd

Dr. Ash,

Please schedule second-round interviews with [REDACTED] and [REDACTED] at 2:00 PM and 2:45 PM, respectively, on Monday, October 16, 2023. Both interviews will be virtual so that Hank Hurd and Kathy Isenhour from HIL Consultants, copied here so that you have their email addresses, can participate remotely.

Please advise both candidates that we will be joined by private consultants who are assisting us with the selection process so that they're not caught off-guard.

Once the interview appointments are confirmed, please send everyone Google Calendar invites that include virtual meeting links. I would like for you and Dr. Collins to once again join me, please.

Finally, please reach out to [REDACTED] by week's end to thank her for her interest in the position and to let her know that, while we are not scheduling a second-round interview with her at this time, we will maintain her employment application for additional consideration as we continue to move through the selection process.

Thanks, and have a good afternoon.

David M. Sutton, Ed.D.

Superintendent

Rutherford County Schools

382 West Main Street | Forest City, NC 28043

Phone 828.288.2200 | Fax 828.288.2490

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Sent from my iPad

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Re: [EXTERNAL] CFO Interviews

hhurd@hilconsultants.com Hank Hurd
To: kisenhour@hilconsultants.com
Cc: dsutton@rcsnc.org David Sutton

Thursday, October 5, 2023 at 12:32:17 PM Eastern Daylight Time

Yes, let's do Monday the 9th!

Sent from my iPhone

On Oct 5, 2023, at 12:16 PM, kisenhour@hilconsultants.com wrote:

Let me confirm with Hank. He is at a conference next week. We were thinking the following Monday, October 16 if that is not too late for your timeframe.

On 2023-10-05 11:59, David Sutton wrote:

Yes, I would be happy to schedule the first interview from 2:00 PM until 2:45 PM, and the second interview from 2:45 PM until 3:30 PM, on Monday, October 9. Will those arrangements work on your end?

David M. Sutton, Ed.D.
Superintendent
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382 West Main Street | Forest City, NC 28043
Phone 828.288.2200 | Fax 828.288.2490

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On Thu, Oct 5, 2023 at 11:57 AM <kisenhour@hilconsultants.com> wrote:

Good morning again- Hank will be leaving from a conference next week. Would it be possible to do both interviews on Monday or Tuesday, October 16 or 17th? If not we will try to make it work for Thursday, October 12th. Thanks, Kathy

On 2023-10-05 10:16, David Sutton wrote:

Good morning!

Thanks for your message, our meeting on Tuesday, and your time with our finance department yesterday. Just following up regarding a date and time for next week's interviews with two prospects for our finance officer position. Tuesday at 11:00 AM is out for me -- we have a groundbreaking ceremony for our new transportation and maintenance facilities planned at that time. Thursday at 10:00 AM works well for me, but I want to make sure I'm not overextending the two of you. Could we plan to schedule both interviews, back-to-back, beginning at 10:00 AM that morning and ending at or around 11:30 AM (approximately 45 minutes each)? If so, please let me know and I'll ask our human resources department to set them up for us. If not,

I'm happy to go back to the drawing board based on your availability.

Thanks again!

David M. Sutton, Ed.D.
Superintendent
Rutherford County Schools
382 West Main Street | Forest City, NC 28043
Phone 828.288.2200 | Fax 828.288.2490

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On Thu, Oct 5, 2023 at 9:46 AM <kisenhour@hilconsultants.com> wrote:

Good morning Dr. Sutton- I am following up on the possible times for the CFO follow-up interviews we discussed on Tuesday. Hank and I are available either next Tuesday at 11:00 a.m. or next Thursday morning at 10:00 a.m. We understand this will be a zoom interview and HR will forward the information.

We feel yesterday was a productive day with the finance staff. Deborah will be onsite weekly and following up with Angie on a daily basis. Hank and/or I will be back on site as needed. In the meantime we will continue to reconcile your budget and provide you written recommendations.

Best regards,

Kathy

Kathy Isenhour, Partner
Hurd, Isenhour, Lopes, LLC (HIL)
828-455-1478

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School list

aownbey@rcsnc.org Angie Ownbey

Wednesday, October 4, 2023 at 2:05:00 PM Eastern Daylight Time

To: debsdesigns62@gmail.com debsdesigns62@gmail.com, kisenhour@hilconsultants.com

attached

--

Angie Ownbey
Assistant Finance Officer
Rutherford County Schools
382 West Main St
Forest City, NC 28043
828-288-2246 phone
828-288-2490 fax
aownbey@rcsnc.org

Attachments:

School Worksheet - schools only.doc 36k

Share request for "2023-2024 PAYROLL SCHEDULES "

drive-shares-dm-noreply@google.com Angie Ownbey (via Google Sheets)

Wednesday, October 4, 2023 at 2:03:08 PM Eastern Daylight Time

To: aownbey@rcsnc.org Angie Ownbey

To: anitab@rcsnc.org

Share a spreadsheet?



Angie Ownbey (aownbey@rcsnc.org) is requesting access to a spreadsheet for the following people:

- debsdesigns62@gmail.com
- kisenhour@hilconsultants.com

Please note there are tabs for different schedules. Traditional, Year round and Reach

2023-2024 PAYROLL SCHEDULES

[Manage sharing](#)

Google LLC, 1600 Amphitheatre Parkway, Mountain View, CA 94043, USA

You have received this email because aownbey@rcsnc.org requested access to a spreadsheet in Google Sheets.

Google Workspace

Audits

aownbey@rcsnc.org **Angie Ownbey** Wednesday, October 4, 2023 at 10:29:03 AM Eastern Daylight Time
To: kisenhour@hilconsultants.com, debsdesigns62@gmail.com

I have attached the audits. Please note the one for FY23 is a draft.

--
Angie Ownbey
Assistant Finance Officer
Rutherford County Schools
382 West Main St
Forest City, NC 28043
828-288-2246 phone
828-288-2490 fax
aownbey@rcsnc.org

Attachments:

Final Rutherford Co BOE 2022 (1).pdf 777k

Draft 2 Rutherford Co BOE 2023.pdf 1.4M

Final remarks

hkerns@rcsnc.org Heidi Kerns
To: hhurd@hilconsultants.com

Friday, September 29, 2023 at 12:30:03 PM Eastern Daylight Time

Hey Hank. I hear through the grapevine that you are going to try and help RCS. Angie is awesome but there are some things she hasn't ever done and she will need support but she is fully capable. I feel bad leaving them with everything going on but as you well know when the FO starts getting circumvented and can't get people to listen, and the Supt is no longer on the same page, then it is time for them to go.

I sent this final email today subsequent to my resignation letter to be sure there is no question that I have advised them appropriately, they just failed to heed the information/guidance provided. All of my files remain either in paper or electronically along with the email history if needed.

I sincerely hope you all can help make this transition as painless as possible. I still appreciate you helping hire me. When it was good there, it was the best job I have ever had.

Take care. See you in New Bern?

Heidi

Sent from my iPhone

Begin forwarded message:

From: Heidi Kerns <hkerns@rcsnc.org>
Date: September 29, 2023 at 11:55:38 AM EDT
To: DAVID SUTTON <DSUTTON@rcsnc.org>
Subject: Final remarks

I know you really don't want to hear anything more from me but I am saying this here so it is a public record.

I guess what really shocks me most about recent events is the "surprise" of everyone about our budget situation. I have been talking about ALL of this since I got here, and then once the overfunding of students caught up to us at the same time the massive pay raises kicked in I ratcheted up those comments and then the county accelerated the situation by suddenly being unresponsive to our funding request and not increasing us at all this year. Literally, the perfect storm.

I have been making several major points:

- (1) We have more buildings than we do students
- (2) We cannot have economies of scale in our spending due to (1).
- (3) We were being overfunded for students we didn't have for years, and that finally caught up to us. Sure we made reductions over the years but nothing to match that scale, and they were not made consistently. In the year we lost the fewest students in years, we still used about \$.5m in fund balance, and had only paid the first, lower year, of record pay raises.

We lost funding for over 900 students since COVID and actually lost over 600 actual students. We had "only" lost almost 1200 in the decade before. Since peak district size and restructuring, ADM dropped by more than the current population of our largest entire district. At the same time many hourly pay

rates and fringe went up 20-30%, others were MUCH higher than usual.

(4) I said multiple times in multiple settings that the pay rates could be celebrated briefly but if we could have afforded those pay rates, we would have already been paying them.

(5) And in reference to (4) that it was going to be unfortunate that people finally saw some higher wages, as they should have, but it would be at the cost of at least 1/3 of the jobs across the district. Angie is in the process of moving 100-120 state and local paid middle and high school positions to 181 for this year only (cannot move elementary due to Title I comparability). That's a lot, and it will need to be more for 2024-2025.

(6) And in reference to (4) and (5) that the fund balance I have been able to squirrel away over these years, would be lucky to cover us a couple of years without some kind of break, action or additional funding, and that is EXACTLY what it has done (see revised estimate I sent earlier this week).

As indicated in these estimates, significant action is needed by 7/1/24 in order to keep the district fiscally viable through the 2024-2025 school year.

(7) And then, to add insult to injury, the county's ongoing underfunding, increased costs, capped off by -0- increase in funding at the same time the rest was hitting us, just accelerated the inevitable.

But just so you know, I have always defended these decisions made when people ask, I have always said, have you heard about a perfect storm and then being between a rock and a hard place? And I explain the above and then say and on top of that, what were you going to do, fire dozens of people in the middle of a pandemic when everyone was already on edge, and we were told to keep everyone employed and drawing a check not to make the economy worse, while addressing a learning loss requirement and having \$30m sitting there to spend? Not a good optic. So that being said, the first chance you could have actually done anything at all would have been for 22-23 potentially, but I can understand why you did not since we were in desperate need of some level of normalcy. So maybe all of this just forced quicker action that should have been done for years now and was the jumpstart everyone needed to get this process started.

I sincerely hate it for everyone involved, but we don't manufacture kids or make the rules or have money trees so like every other crazy thing that has happened over the years, schools are expected once again to make the best of it and make it work. This one will just be the toughest one yet.

As I said before, I would be willing to come back and assist in any way needed if you would like to contract with or employ me to do so, but it doesn't seem that you deem that necessary and that's fine too. I just hate to leave my folks in the middle of a mess. It will really be bad if you don't hang on to them and the current debacle in HR might just put them over the top. Hopefully that will get better soon.

I sincerely hope the district emerges from the upcoming changes stronger than before and that all goes as well as it possibly can.

—

Heidi Faber Kerns, CMA
Finance Officer
Rutherford County Schools
382 West Main Street
Forest City, NC 28043
(828) 288-2240 (Direct)
(828) 429-0982 (Cell)

Success is not final, failure is not fatal: it is the courage to continue that counts. - Unknown

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Re: [EXTERNAL] Rutherford County Schools Proposal/HIL, Consultants

dsutton@rcsnc.org David Sutton
To: kisenhour@hilconsultants.com
Cc: hhurd@hilconsultants.com Hank Hurd

Thursday, September 21, 2023 at 8:33:43 AM Eastern Daylight Time

Good morning!

Yes, those arrangements sound great to me. I've reserved the time for us to have an initial meeting at 3:00 PM on Tuesday, October 3, and for you to engage with the finance department during the morning of Wednesday, October 4.

Thanks again for your flexibility. I look forward to meeting both of you in person soon.

David M. Sutton, Ed.D.
Superintendent
Rutherford County Schools
382 West Main Street | Forest City, NC 28043
Phone 828.288.2200 | Fax 828.288.2490

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On Wed, Sep 20, 2023 at 3:19 PM <kisenhour@hilconsultants.com> wrote:

Good afternoon Dr. Sutton- Hank and I are in different parts of the state on Monday, October 2. Would it be possible to meet with you from 3:00 to approximately 4:00 or later on Tuesday afternoon, October 3 and introduce ourselves to you and the interim finance officer? We would like to review our gap services especially since it looks like the State budget will hopefully be approved soon. We would also be available to work with the finance staff and/or the interim finance office on Wednesday morning, October 4 to get a feel of what the staff is working on and how we best can assist. We have a third retired finance officer that lives in area that will also be available to assist. She is an expert in the software used by your district.

Warmest regards,

Kathy

Kathy Isenhour, Partner

Hurd, Isenhour, Lopes, Consultants, LLC

On 2023-09-20 14:26, David Sutton wrote:

Good afternoon! Unfortunately, I'm scheduled to hold our monthly staff meetings with principals and our district leadership team from 8:00 AM until 12:00 Noon on October 4, and then need to leave the office in the early afternoon for a scheduled medical appointment. I would try to reschedule the morning's meetings, except our school board attorney is scheduled to be here with us that day for our annual legal training session for school administrators. Is there any chance that the two of you are available at the same time on Monday, October 2, instead?

Thanks, and apologies for the conflict on the day you proposed.

David M. Sutton, Ed.D.
Superintendent
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On Wed, Sep 20, 2023 at 1:46 PM Hank Hurd <hhurd@hilconsultants.com> wrote:

Good afternoon Dr. Sutton,

I hope your day is going well!

We are busy scheduling our October site visits and want to make sure we get to RCS early in October. Kathy and I would like to meet with you and your staff on October 4th from 8:30 to 1:30 if possible?

We will request several fiscal year financial reports in advance of our visit as we plan to maximize time with your financial team.

Please confirm if this date works for you and your staff?

Best regards,
Hank Hurd, Partner
HIL, Consultants, LLC

On Sep 15, 2023, at 10:04 AM, David Sutton <dsutton@rcsnc.org> wrote:

Good morning to both of you, and thank you again for sending along the proposal so quickly. I do apologize for the unusual delay in my reply. An ongoing case of COVID-19 has consumed much of my time and energy this week.

I have signed, dated, and attached the proposal and look forward to working with you throughout this upcoming transition. At your convenience, please let me know what next steps we need to take. In the meantime, I hope you both enjoy the upcoming weekend.

David M. Sutton, Ed.D.
Superintendent
Rutherford County Schools
382 West Main Street | Forest City, NC 28043
Phone 828.288.2200 | Fax 828.288.2490

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On Wed, Sep 6, 2023 at 10:04 AM Hank Hurd <hhurd@hilconsultants.com> wrote:

Good morning Dr. Sutton,

It was good to talk with you yesterday about your districts interim CFO needs.

As we discussed, HIL, Consultants has successfully helped many NC LEAs with this type engagement.

Please call if we can answer any additional questions

Best regards,
Hank Hurd, Partner
HIL Consultants, LLC

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<RutherfordProposal9.6.23 (1).pdf>

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Board Update | Friday, September 8, 2023

dsutton@rcsnc.org David Sutton

Friday, September 8, 2023 at 7:18:03 PM Eastern Daylight Time

To: pscott@rcsnc.org Paul Scott, pmorrow@rcsnc.org Philip Morrow, aprilm@rcsnc.org April Mayse, tshort@rcsnc.org Tracy Short, angelk@rcsnc.org Angel King, bnanney@rcsnc.org Brandi Nanney, rficklin@rcsnc.org Rick Ficklin

Dear Board Members,

It was good seeing you earlier this week, and I hope you're all looking forward to a relaxing weekend.

Earlier today, I attended our monthly WRESA Superintendents' Council meeting, and others in attendance are hearing the same rumors I am -- namely, that we should expect House and Senate votes on the state budget some time next week. The Proposed Committee Substitute ("PCS"), which reflects the resolution of disagreements between the two chambers' versions of the budget as negotiated by the Joint Conference Committee, hasn't yet been released, but that's not necessarily a barrier to votes in the coming week. It is entirely possible -- maybe even probable -- that votes could swiftly follow its release. Stay tuned for possibly fast developments on that front.

Also during our meeting today, Dean Shatley of Campbell Shatley PLLC took a deep dive into S.L. 2023-106 ("Parents' Bill of Rights"), though his presentation was more a summary of what we don't yet know or understand about the legislation than it was a decisive blueprint for implementation. He mentioned the strong possibility that the General Assembly could vote to delay its implementation until January 1, 2024, some time during the coming week, which would certainly be helpful given all the unanswered questions about key terminology that lacks definition in the legislation (or elsewhere in state law).

As the week draws to a close, I hope the information I've included in today's update is helpful. As always, please call me at your convenience on Monday if you need additional information or have any related questions I can help to answer.

2022-2023 State Testing Results

Earlier this week, the State Board of Education released state testing results from the 2022-2023 school year. I have attached a PDF version of the official release from the North Carolina Department of Public Instruction in case you are interested in reading it. Assistant superintendent Renee Collins is preparing the collection of local tracking charts for presentation during the October 3 Board meeting.

As you'll recall from previous years, one of those sets compares the distribution of School Performance Grades in Rutherford County Schools to a variety of other benchmarks. I am very happy to report that Rutherford County Schools has pulled demonstrably ahead of the state, west region, our comparison system (Stanly County Schools), Burke County Schools, Cleveland County Schools, McDowell County Schools, charter schools serving Rutherford County resident children, and school systems statewide with a similar economic profile. We saw those impressive performance patterns before the onset of the COVID-19 pandemic, and I am very happy to see that we have returned to that level of success. By way of a quick example, I have attached the comparisons between Rutherford County Schools and the state as a whole for the 2021-2022 and 2022-2023 school years, which together demonstrate that we outperformed the state during the first post-COVID year and dramatically widened our lead in the second. I look forward to the formal presentation of those results, along with updated data for the corresponding assessment metrics, during the October 3 Board meeting.

HIL Consultants

To date, we have received no inquiries or applications for the position of finance officer. Anticipating that the process may be prolonged, and following some discussion with Chairman Morrow, I scheduled a conference call earlier this week with two of the principal partners at HIL Consultants (named for founding partners Hank Hurd, Kathy Isenhour, and Frank R. Lopes, Jr.) to explore what kind of external support they may be able to provide to our finance department and school system, and I want to share some related information with you.

HIL Consultants is composed of about ten leading experts with experience in school system finance operations, human resources, child nutrition, transportation, and other specialized fields. By way of example, Hank Hurd "...served as the Durham Public Schools' Chief Operating Officer where he was responsible for overseeing finance, human resource services, operational services, security, as well as information technology for the district. Prior to joining Durham Public Schools, he served as the Associate State Superintendent for Financial and Business Services and Chief Financial Officer at the N.C. Department of Public Instruction for three years." Others there have similar backgrounds and experiences.

While HIL Consultants offers a wide range of services, one of the most common they provide is direct support for school system finance departments during the interim period between finance officers. (They can also help to train and support incoming finance officers, especially those with finance experience outside the education sector, evaluate the fiscal health and efficiency of school

systems, and provide a range of other services both within and outside school finance.) Following some extended discussion about our needs and context during our conference call, I asked them to send me a formal proposal for services. I have attached it for your review. In particular, please note the "Scope of Work" detailed at the bottom of page 1 and top of page 2, along with the related description of fees at the bottom of page 2, which reads:

Based upon the current scope for this engagement we estimate that our fees and expenses for these services will not exceed \$10,750 per month plus mileage at the current state rate. Should it appear that the scope of services required extends beyond this amount we will be pleased to discuss an amendment to extend the scope of services and will be provided under the terms of a separate engagement letter.

While no one wants to incur additional expenses, I believe it will be critical that we secure this support, assistance, and expertise while our search for a new finance officer continues. It also bears noting that, during the period between finance officers, that salary and benefits cost will be deferred and can be redirected toward the cost of HIL Consultants' services. For reference, the monthly cost of Heidi Kerns' salary and benefits is \$13,578.31, which is \$2,828.31 more than the "will not exceed" amount of \$10,750 per month proposed by HIL Consultants.

Barring any strong objections from Board members, I plan to execute and return the service agreement with HIL Consultants next week so that they are prepared to begin working with us immediately upon Ms Kerns' departure later this month. If you have any questions at all about the group's proposed scope of work or other related details, please don't hesitate to call me at any time.

Funding for OREd Optimization Study

Some time ago, I had scheduled a meeting with county manager Steve Garrison to discuss the possibility of the county's funding the \$22,500 cost of the OREd optimization study, but we had to postpone when COVID-19 struck his home. We were able to sit down together yesterday morning and had a lengthy and very positive discussion. Shortly thereafter, he sent me a quick follow-up email, in which he noted, "I also advised Paula [Roach] that you and your Board are moving forward with the OREd collaboration and that we (the County) need to prepare for partnering to help RCS offset the expense for this work upon completion." Just wanted to pass that information along so that you're aware of the county's financial support for the project.

Enrollment Summary

We have seen very little change in student enrollment since I last updated you on Friday, September 1. At that time, our K-12 enrollment was 7,204; today, it is 7,205. At that total, our current enrollment is 58 fewer than our Allotted Average Daily Membership of 7,263.

School	PK (-2)	PK (-1)	K	1	2	3	4	5	6	7	8	9	10	11	12	PK-12	K-12
Carver Center	24	36														60	0
Chase High School												159	164	177	129	629	629
Chase Middle School									162	163	166					491	491
Cliffside Elementary School			29	32	21	49	26	41								198	198
East Rutherford High School												162	161	186	141	650	650
East Rutherford Middle School									200	195	173					568	568
Ellenboro Elementary School		36	76	94	86	83	91	91								557	521
Forest City-Dunbar Elementary School		34	77	78	80	83	79	66								497	463
Forrest W. Hunt Elementary School		36	72	65	67	55	61	52								408	372
Harris Elementary School		31	73	65	76	70	53	65								433	402
Mt. Vernon-Ruth Elementary School		16	44	28	34	43	39	38								242	226
Pinnacle Elementary School		20	36	40	27	36	36	31								226	206
R-S Central High School												202	213	196	137	748	748
R-S Middle School									182	188	188					558	558
Rutherford Early College High School												57	54	50	41	202	202
Rutherford Opportunity Center										2	10	23	38	20	5	98	98

Rutherfordton Elementary School	17	52	67	65	62	66	64											393	376
Spindale Elementary School	12	50	55	49	48	52	63											329	317
Sunshine Elementary School	18	40	44	27	27	21	21											198	180
District Total	24	256	549	568	532	556	524	532	544	548	537	603	630	629	453	7,485	7,205		

NCSBA Legislative Update

Earlier today, the North Carolina School Boards Association (NCSBA) published its regular Legislative Update. I will forward it to each of you in case you didn't receive a copy directly from the organization. Today's installment includes an excellent summary of this week's State Board of Education meeting.

Thanks, and have a good weekend.

David M. Sutton, Ed.D.

Superintendent

Rutherford County Schools

382 West Main Street | Forest City, NC 28043

Phone 828.288.2200 | Fax 828.288.2490

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Attachments:

[EXTERNAL] NC Students Make Gains in 2023-23, Continuing Recovery from COVID Losses.pdf 429k

Sample SPG Comparisons.pdf 127k

RutherfordProposal9.6.23.pdf 137k

Re: [EXTERNAL] Interim Finance Request

dsutton@rcsnc.org David Sutton
To: kisenhour@hilconsultants.com
Cc: hhurd@hilconsultants.com Hank Hurd

Thursday, August 31, 2023 at 5:08:09 PM Eastern Daylight Time

That sounds great. Look forward to connecting with you both next week.

David M. Sutton, Ed.D.
Superintendent
Rutherford County Schools
382 West Main Street | Forest City, NC 28043
Phone 828.288.2200 | Fax 828.288.2490

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Sent from my iPhone

On Aug 31, 2023, at 4:35 PM, kisenhour@hilconsultants.com wrote:

Dr. Sutton - We are sorry to hear about your loss. Hank and I will schedule to call you between 11 and 11:15 am on Tuesday.

Kathy

On 2023-08-31 15:35, David Sutton wrote:

Good afternoon, and thanks very much for your quick response. Unfortunately, I will be away from the office tomorrow to attend the funeral services of a family member. However, any time between 11:00 AM and 4:00 PM on Tuesday, September 5, would work well for me. If the two of you have some availability within that window, just let me know what timing works best for you so that I can set aside time for the call. Once it's arranged, you can bypass the receptionist by calling me directly at 828.288.2211.

Thanks again, and enjoy the upcoming holiday weekend.

David M. Sutton, Ed.D.
Superintendent
Rutherford County Schools
382 West Main Street | Forest City, NC 28043
Phone 828.288.2200 | Fax 828.288.2490

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On Thu, Aug 31, 2023 at 2:55 PM <kisenhour@hilconsultants.com> wrote:

Good afternoon Dr. Sutton- We received your email regarding the resignation of your CFO and request for assistance during the interim. If you are available, Hank Hurd and I would like to discuss the details of your request tomorrow morning at 9:00 a.m. If tomorrow is not convenient, please give us some times and dates that may work and the phone number you would like us to call you.

We look forward to speaking with you.

Best regards,

Kathy Isenhour, CPA

Kathy H. Isenhour, Partner

Hurd, Isenhour, Lopes, LLC (HIL)

828-455-1478

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Re: [EXTERNAL] Interim Finance Request

dsutton@rcsnc.org David Sutton

Thursday, August 31, 2023 at 5:08:09 PM Eastern Daylight Time

To: kisenhour@hilconsultants.com

Cc: hhurd@hilconsultants.com Hank Hurd

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David M. Sutton, Ed.D.

Superintendent

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We look forward to speaking with you.

Best regards,

Kathy Isenhour, CPA

Kathy H. Isenhour, Partner

Hurd, Isenhour, Lopes, LLC (HIL)

828-455-1478

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[EXTERNAL] Hank Hurd Referral

john@csedlaw.com John Henning
To: dsutton@rcsnc.org dsutton@rcsnc.org

Wednesday, August 30, 2023 at 3:10:27 PM Eastern Daylight Time

<https://www.hilconsultants.com/experts/h-hank-hurd-mba>

John F. Henning, Jr.

674 Merrimon Ave., Ste. 210

Asheville, NC 28804

828.333.4863

www.csedlaw.com

Attachments:

image001.jpg 219k

Re: HILS Consulting

asmith@rcsnc.org Amy Smith
To: jemorris@rcsnc.org John Morris

Thursday, November 16, 2023 at 3:45:49 PM Eastern Standard Time

John,

We have the attached agreement but do not have a formal contract.

Thanks,
Amy Smith
Executive Assistant
Rutherford County Schools
382 West Main Street
Forest City, NC 28043
828.288.2211
828.748.8376

On Wed, Nov 15, 2023 at 10:03 AM John Morris <jemorris@rcsnc.org> wrote:
Amy,

Do you have the HILS consulting group contract to upload to the document cabinet?

Thank you,

John Morris
Junior Accountant
Rutherford County Schools
382 West Main Street
Forest City, NC 28043
(828) 288-2330 (Direct)

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Attachments:

RutherfordProposal9.6.23 (1).pdf 236k

Signed Proposal | HIL Consultants

dsutton@rcsnc.org David Sutton

To: **asmith@rcsnc.org Amy Smith**

Thursday, November 16, 2023 at 1:10:26 PM Eastern Standard Time

Attached.

David M. Sutton, Ed.D.

Superintendent

Rutherford County Schools

382 West Main Street | Forest City, NC 28043

Phone 828.288.2200 | Fax 828.288.2490

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Attachments:

RutherfordProposal9.6.23 (1).pdf 236k

Re: [EXTERNAL] Rutherford County Schools Proposal/HIL, Consultants

dsutton@rcsnc.org David Sutton
To: kisenhour@hilconsultants.com
Cc: hhurd@hilconsultants.com Hank Hurd

Thursday, September 21, 2023 at 8:33:43 AM Eastern Daylight Time

Good morning!

Yes, those arrangements sound great to me. I've reserved the time for us to have an initial meeting at 3:00 PM on Tuesday, October 3, and for you to engage with the finance department during the morning of Wednesday, October 4.

Thanks again for your flexibility. I look forward to meeting both of you in person soon.

David M. Sutton, Ed.D.
Superintendent
Rutherford County Schools
382 West Main Street | Forest City, NC 28043
Phone 828.288.2200 | Fax 828.288.2490

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On Wed, Sep 20, 2023 at 3:19 PM <kisenhour@hilconsultants.com> wrote:

Good afternoon Dr. Sutton- Hank and I are in different parts of the state on Monday, October 2. Would it be possible to meet with you from 3:00 to approximately 4:00 or later on Tuesday afternoon, October 3 and introduce ourselves to you and the interim finance officer? We would like to review our gap services especially since it looks like the State budget will hopefully be approved soon. We would also be available to work with the finance staff and/or the interim finance office on Wednesday morning, October 4 to get a feel of what the staff is working on and how we best can assist. We have a third retired finance officer that lives in area that will also be available to assist. She is an expert in the software used by your district.

Warmest regards,

Kathy

Kathy Isenhour, Partner

Hurd, Isenhour, Lopes, Consultants, LLC

On 2023-09-20 14:26, David Sutton wrote:

Good afternoon! Unfortunately, I'm scheduled to hold our monthly staff meetings with principals and our district leadership team from 8:00 AM until 12:00 Noon on October 4, and then need to leave the office in the early afternoon for a scheduled medical appointment. I would try to reschedule the morning's meetings, except our school board attorney is scheduled to be here with us that day for our annual legal training session for school administrators. Is there any chance that the two of you are available at the same time on Monday, October 2, instead?

Thanks, and apologies for the conflict on the day you proposed.

David M. Sutton, Ed.D.
Superintendent
Rutherford County Schools
382 West Main Street | Forest City, NC 28043
Phone 828.288.2200 | Fax 828.288.2490

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On Wed, Sep 20, 2023 at 1:46 PM Hank Hurd <hhurd@hilconsultants.com> wrote:

Good afternoon Dr. Sutton,

I hope your day is going well!

We are busy scheduling our October site visits and want to make sure we get to RCS early in October. Kathy and I would like to meet with you and your staff on October 4th from 8:30 to 1:30 if possible?

We will request several fiscal year financial reports in advance of our visit as we plan to maximize time with your financial team.

Please confirm if this date works for you and your staff?

Best regards,
Hank Hurd, Partner
HIL, Consultants, LLC

On Sep 15, 2023, at 10:04 AM, David Sutton <dsutton@rcsnc.org> wrote:

Good morning to both of you, and thank you again for sending along the proposal so quickly. I do apologize for the unusual delay in my reply. An ongoing case of COVID-19 has consumed much of my time and energy this week.

I have signed, dated, and attached the proposal and look forward to working with you throughout this upcoming transition. At your convenience, please let me know what next steps we need to take. In the meantime, I hope you both enjoy the upcoming weekend.

David M. Sutton, Ed.D.
Superintendent
Rutherford County Schools
382 West Main Street | Forest City, NC 28043
Phone 828.288.2200 | Fax 828.288.2490

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On Wed, Sep 6, 2023 at 10:04 AM Hank Hurd <hhurd@hilconsultants.com> wrote:

Good morning Dr. Sutton,

It was good to talk with you yesterday about your districts interim CFO needs.

As we discussed, HIL, Consultants has successfully helped many NC LEAs with this type engagement.

Please call if we can answer any additional questions

Best regards,
Hank Hurd, Partner
HIL Consultants, LLC

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<RutherfordProposal9.6.23 (1).pdf>

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Re: FYI

brichardson@rcsnc.org Brad Richardson
To: tash@rcsnc.org Tammie Ash

Thursday, December 7, 2023 at 8:24:16 PM Eastern Standard Time

Thanks. I'm obviously familiar with the 21st century grant. I will look at the others. I am afraid I won't be able to staff a middle school after school program.

Brad Richardson

On Thu, Dec 7, 2023 at 4:39 PM Tammie Ash <tash@rcsnc.org> wrote:

Brad,
I mentioned the need for more funding during some time with Kathy Isenhour from the Hil Consulting Group. She said many districts use competitive grants as an additional source of revenue.

This is the link she shared: <https://www.dpi.nc.gov/districts-schools/funding-opportunities>. You may already know about all of these, but I wanted to share just in the event you were not aware.

She and I also talked about the need to find additional funding for our middle schools. I will keep trying and keep you posted.

--

Tammie Ash, Ed.D.
Executive Director of Human Resources
Rutherford County Schools
382 West Main Street | Forest City, NC 28043
Phone 828.288.2230 | Fax 828.288.2490



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Re: [EXTERNAL] Fwd: Rutherford Ex. Summary Draft November 2023

jkelly@rcsnc.org Jolie Kelly
To: **dsutton@rcsnc.org David Sutton**

Tuesday, December 5, 2023 at 5:05:43 PM Eastern Standard Time

I was able to log in to my email this afternoon around 4:30, so I'm trying to get everything set up. I will review this before our meeting tomorrow.

Thank you,

Jolie

On Tue, Dec 5, 2023 at 12:16 PM David Sutton <dsutton@rcsnc.org> wrote:

As promised during our discussion yesterday afternoon, I am forwarding you a copy of the draft report from HIL Consultants so that you have an opportunity to review it before our related meeting with Kathy Isenhour (and Deborah Frisby) at 1:30 PM tomorrow afternoon.

Thanks, and have a good afternoon.

David M. Sutton, Ed.D.
Superintendent
Rutherford County Schools
382 West Main Street | Forest City, NC 28043
Phone 828.288.2200 | Fax 828.288.2490

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----- Forwarded message -----

From: **Hank Hurd** <hhurd@hilconsultants.com>
Date: Mon, Nov 13, 2023 at 11:39 AM
Subject: [EXTERNAL] Fwd: Rutherford Ex. Summary Draft November 2023
To: David Sutton <dsutton@rcsnc.org>
Cc: Kathy Isenhour <kisenhour@hilconsultants.com>

Good morning Dr.Sutton,
Thanks for your time last week while we were on site at RCS.
Please look over the attached executive summary and Kathy and I will be available for Q&A at your convenience.

Best regards,
Hank Hurd, Partner
HIL, Consultants, LLC

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Re: [EXTERNAL] NCASBO Mentor

ncasbo.pd@gmail.com Karen Rogerson
To: dsutton@rcsnc.org David Sutton

Thursday, December 7, 2023 at 4:19:43 PM Eastern Standard Time

Received and thank you! If I can be of further assistance, please reach back out to me.

Best,

Karen Rogerson

On Thu, Dec 7, 2023 at 4:05 PM David Sutton <dsutton@rcsnc.org> wrote:
Good afternoon,

I have attached Mrs. Kelly's signed mentor program form, and also copied this message to her so that you have her email address handy should you need to contact her directly at any point.

Thanks again for your help, and enjoy the rest of your week.

David M. Sutton, Ed.D.
Superintendent
Rutherford County Schools
382 West Main Street | Forest City, NC 28043
Phone 828.288.2200 | Fax 828.288.2490

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On Mon, Dec 4, 2023 at 10:56 AM Karen Rogerson <ncasbo.pd@gmail.com> wrote:
Good morning Dr. Sutton,

I have spoken with Deborah Frisby and she has indicated that she is more than willing to continue to provide Mentor services to Rutherford County Schools. She indicated that she planned to be at your LEA on Wednesday to meet with Mrs. Kelly and to set up a schedule with her moving forward. I have attached the Mentor Program sheet that Mrs. Kelly will need to sign and return to me at her convenience.

If you have any additional questions, please do not hesitate to contact me by email or phone. I am glad that NCASBO could be of assistance to your LEA during this transition period.

Kind regards,

Karen Rogerson



Karen Rogerson, Professional Learning Coordinator
NCASBO
(252) 799-9346

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monitoring and disclosure to third parties, including law enforcement.*



Karen Rogerson, Professional Learning Coordinator
NCASBO
(252) 799-9346



Re: [EXTERNAL] Confirmation of Training - December 7th

debsdesigns62@gmail.com Deborah Frisby

Thursday, November 30, 2023 at 1:16:53 PM Eastern Standard Time

To: tash@rcsnc.org Tammie Ash

You're welcome! 😊

On Thu, Nov 30, 2023 at 12:37 PM Tammie Ash <tash@rcsnc.org> wrote:

Ok, see you then.

Thank you!

On Thu, Nov 30, 2023 at 12:32 PM Deborah Frisby <debsdesigns62@gmail.com> wrote:

Kathy says 9:00 am !

Thanks so much! Have a great day!!!

Sent from my iPhone

On Nov 30, 2023, at 11:27 AM, Tammie Ash <tash@rcsnc.org> wrote:

Yes, mam! It will be me along with Haley Cobb. What time did we decide on?

Thank you again!

On Wed, Nov 29, 2023 at 12:31 PM Deborah Frisby <debsdesigns62@gmail.com> wrote:

Good afternoon Dr. Ash, I hope you had a wonderful Thanksgiving.

Kathy Isenhour wanted me to confirm that you and your selected team members are still on for the retirement training next Thursday, December 7th. I apologize but I do not remember the name of the other lady in HR that will be trained. 😊

Just let me know and I will pass it along to Kathy.

Thanks so much! Have a great afternoon!

--

Tammie Ash, Ed.D.
Executive Director of Human Resources
Rutherford County Schools
382 West Main Street | Forest City, NC 28043
Phone 828.288.2230 | Fax 828.288.2490



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--

Tammie Ash, Ed.D.
Executive Director of Human Resources
Rutherford County Schools
382 West Main Street | Forest City, NC 28043
Phone 828.288.2230 | Fax 828.288.2490



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Board Update | Friday, October 20, 2023

dsutton@rcsnc.org David Sutton

Friday, October 20, 2023 at 9:09:01 PM Eastern Daylight Time

To: pscott@rcsnc.org Paul Scott, pmorrow@rcsnc.org Phillip Morrow, apriln@rcsnc.org April Mayse, tshort@rcsnc.org Tracy Short, angelk@rcsnc.org Angel King, bnanney@rcsnc.org Brandi Nanney, rficklin@rcsnc.org Rick Ficklin

Dear Board Members,

It was good seeing you at Tuesday's Local Advisory Council installation ceremony, and I appreciate your taking part in this year's program. I have included several informational items for you in this week's update. As always, please call me at your convenience next week if you need any additional information or have any related questions I can help to answer.

Exit Interview Questionnaire

We put the finishing touches on our new Exit Interview Questionnaire earlier this week, improving on the draft I shared with you last Friday by including some additional job titles under question 4; including some additional separation conditions under question 5; including some additional separation factors under question 6; and fine tuning some existing response options under question 11. The URL and QR code for the draft instrument have been disabled and replaced with a URL and QR code for the operational instrument, which went live for use on Tuesday. I have also prepared an invitation to participate that we have now begun sharing with all departing employees through the Human Resources department.

Finance Officer Vacancy

On Monday, Hank Hurd and Kathy Isenhour from HIL Consultants joined me for a second round of interviews with the two strongest finance officer candidates emerging from our first round interviews. Their independent assessment matched our own -- namely, that the leading candidate is head-and-shoulders above the next most qualified candidate. When we debriefed after the interviews, Mr. Hurd noted that they have participated in finance officer selection interviews in 20 to 30 school systems and found our leading candidate to be one of the most outstanding they have met.

Both interviews to date with the leading candidate have been via videoconference since she currently lives in DeLand, Florida. She and her husband have purchased a home in Rutherfordton. He is here now, and she plans to join him soon, pending professional transitions with her current job. She has accepted our invitation to travel here for a series of personal meetings and interactions on Thursday, October 26, and I will update you again after our visit. I am excited, though, that we have such a strong candidate for the position.

On a semi-related note, Kathy Isenhour and Deborah Frisby, also with HIL Consultants, are working very closely with interim finance officer Angie Ownbey to structure budgets now that we have state allotments from NCDPI. They are doing excellent work. I would anticipate bringing the initial budget resolution to the Board on Tuesday, November 14, and I would also anticipate that Deborah Frisby will likely handle that presentation since she is most heavily involved, and very experienced, in that work.

Affordable Educator Housing Effort

Earlier this week, Sarah Grymes with Dogwood Health Trust, contacted me to share a few updates around the affordable educator housing effort on the former R-S Middle School campus. Of particular note:

- Thanks in no small part to the great work of historian and project partner Brian LaBrie, the State Historic Preservation Office has approved the addition of the former library building to the registry, which will add ten more apartment units to the master plan.
- The State Employees Credit Union formally voted to participate in the project, contributing a \$2 million, 0% interest loan to help fund the project alongside Dogwood Health Trust's own independent financial support.

- Jackie Martin, the long-time historic architect who was so excited to help us with the project, recently passed away due to pancreatic cancer. His firm has been trying to help with the project as much as possible following his passing, but they do not have the expertise to finish. Dogwood Health Trust will either hire another expert to get the last pieces wrapped up or bring in another firm to help. Sarah noted, "There is a great firm out of Chapel Hill we are hoping to sign on. We are hoping this will not take too long to get the new firm on board and can go out to bid for final numbers pretty quickly."

Thanks, and have a good weekend.

David M. Sutton, Ed.D.

Superintendent

Rutherford County Schools

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Fwd: [EXTERNAL] 2023-24 Proposed Local Budget

aownbey@rcsnc.org Angie Ownbey
To: jemorris@rcsnc.org John Morris

Friday, November 3, 2023 at 12:56:11 PM Eastern Daylight Time

Please enter the attached local budget. Each PRC has a tab
Thanks

----- Forwarded message -----

From: **Deborah Frisby** <debsdesigns62@gmail.com>

Date: Fri, Nov 3, 2023 at 11:16 AM

Subject: [EXTERNAL] 2023-24 Proposed Local Budget

To: Angie Ownbey <aownbey@rcsnc.org>

Cc: Kathy Isenhour <kisenhour@hilconsultants.com>, Deborah Frisby <debsdesigns62@gmail.com>

Hi Angie,

Attached is the 2023-24 Proposed Local budget. The budget totals \$16,980,820.

The revenue codes will be as follows:

2.4110. Local Appropriation	\$ 16,655,820
2.4410 Fines and Forfeitures	\$ <u>325,000</u>
Total	\$16,980,820

Per our telephone conversation, I had to cut \$882,000 from what I calculated as actual cost and historical spending.....



Once the beginning budget is approved, we will do a deep drive into State and local and move some costs to state.

Please review carefully. We can discuss in greater detail next week. Thanks so much! Have a great today and weekend!

I will send capital outlay here shortly!

P.S. Below is a comparison from last year to this year's budget.

	2023-24	2022-23
PRC 001	\$166,390.00	\$1,520,000.00
PRC 002	\$886,658.00	\$960,000.00
PRC 003	\$791,049.00	\$1,655,650.00
PRC 005	\$1,046,665.00	\$1,010,170.00
PRC 007	\$374,203.00	\$1,710,000.00
PRC 009	\$1,580,200.00	\$1,590,000.00
PRC 028	\$50,000.00	\$50,000.00
PRC 036	\$2,584,080.00	\$2,425,000.00
PRC 039	\$847,116.00	\$780,000.00
PRC 056	\$209,319.00	\$240,000.00
PRC 061	\$953,000.00	\$953,000.00
PRC 801	\$1,709,881.00	\$1,680,000.00

PRC 802	\$5,129,528.00	\$5,030,000.00
PRC 882	\$157,731.00	\$150,000.00
PRC 884	\$475,000.00	\$455,000.00
PRC 885	\$20,000.00	\$17,000.00

	\$16,980,820.00	\$20,225,820.00	\$3,245,000.00	cut in 2023-24
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\$20,156,052.05 spent 2022-23

2023-24

Revenue \$16,655,820.00

F & F \$325,000.00

\$16,980,820.00

--
 Angie Ownbey
 Interim Finance Officer
 Rutherford County Schools
 382 West Main St
 Forest City, NC 28043
 828-288-2246 phone
 828-288-2490 fax
 aownbey@rcsnc.org

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Attachments:

2023-24 Proposed Local Budget 11.3.2023.xlsx 136k

Re: [EXTERNAL] Re: Retirement Training

debsdesigns62@gmail.com Deborah Frisby

Thursday, October 26, 2023 at 5:05:13 PM Eastern Daylight Time

To: tash@rcsnc.org Tammie Ash

Cc: aownbey@rcsnc.org Angie Ownbey

This meeting date and time has been confirmed and scheduled.

Have a great evening!

Sent from my iPhone

On Oct 26, 2023, at 4:30 PM, Tammie Ash <tash@rcsnc.org> wrote:

Thank you! November 8 at 2:30 works for us! I am going to halt all retirement meetings until after we meet.

On Thu, Oct 26, 2023 at 1:30 PM Deborah Frisby <debsdesigns62@gmail.com> wrote:

Me agina...Dr. Ash, will the afternoon of November 8th at 2:30 work for the initial meeting and then we will plan accordingly?

On Thu, Oct 26, 2023 at 12:59 PM Deborah Frisby <debsdesigns62@gmail.com> wrote:

Good afternoon! Thank you for this information and I have shared this with Kathy Isenhour. She will contact you, Dr. Ash, directly to schedule a date and time.

Have a great afternoon!

On Thu, Oct 26, 2023 at 8:23 AM Tammie Ash <tash@rcsnc.org> wrote:

Angie & Deborah,

Thank you! We would like to participate as early in November as possible. As of right now, it looks like 11/14 & 11/15 would not work for us, but the rest of the month is pretty open as this is a top priority for my team. Thank you!

On Thu, Oct 26, 2023 at 8:17 AM Angie Ownbey <aownbey@rcsnc.org> wrote:

Good morning,

There is someone that can help with retirement training. They will not be available until November. I have included Deborah in this email so she can pass along the dates. Please list dates that would be convenient. Thanks

--

Angie Ownbey
Interim Finance Officer
Rutherford County Schools
382 West Main St
Forest City, NC 28043
828-288-2246 phone
828-288-2490 fax
aownbey@rcsnc.org

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Board Update | Friday, October 6, 2023

dsutton@rcsnc.org David Sutton

Friday, October 6, 2023 at 10:59:04 PM Eastern Daylight Time

To: pscott@rcsnc.org Paul Scott, pmorrow@rcsnc.org Phillip Morrow, apriln@rcsnc.org April Mayse, tshort@rcsnc.org Tracy Short, angelk@rcsnc.org Angel King, bnanney@rcsnc.org Brandi Nanney, rficklin@rcsnc.org Rick Ficklin

Dear Board Members,

It was good seeing you earlier this week, and I hope you're all looking forward to a beautiful fall weekend. Following Tuesday's Board meeting, we held our monthly Leadership Team meeting on Wednesday, and, as you can imagine, there were a lot of good vibes in the air following assistant superintendent Renee Collins' presentation of school performance results from the 2022-2023 school year. The Rutherford County Schools Education Foundation treated our Leadership Team members to cake following the meeting, both to highlight a banner year for student achievement and National Principals Month, underway throughout the month of October. We were also happy to host school board attorney John Henning during the meeting, who provided our annual legal training session for school administrators. Customarily, we provide that training session on the day we reserve for our opening assembly and professional development activities as the new school year gets underway. However, given the pendency of several very important pieces of proposed legislation in early August, we deliberately held off until October to give those bills time to make their way through the legislative process. It paid off, and Mr. Henning was able to devote about two-and-a-half hours to the Parents' Bill of Rights, paid parental leave, school threat assessment teams, high school athletics administration, and other timely legal topics.

Throughout the week, OREd's individual interviews with local key informants continued during the land use study phase of the agency's broader work, and I was able to cap off a busy week with a great trip over to Isothermal Community College this morning to join fifth graders from all of our elementary schools during this year's Conservation Field Day activities, sponsored and facilitated again this year by the Rutherford County Soil & Water Conservation District.

As the week draws to a close, I have included several informational items for you in today's update. Please don't hesitate to call me at your convenience on Monday if you need any additional information or have any related questions I can help to answer.

Reminder | Groundbreaking Ceremony

Please don't forget to mark your calendars for the groundbreaking ceremony for our new transportation and maintenance facilities. The ceremony will be held on the baseball field at the former R-S Middle School campus on Charlotte Road beginning at 11:00 AM on Tuesday, October 10. Following a ceremony that will include brief remarks and photo opportunities, refreshments will be available to attendees. Printed invitations have gone out, and I have attached a PDF version of the program for you below. Hope to see you there!

Local Advisory Council Installation Dinner

As noted on Tuesday's Board meeting agenda, we will hold our annual Local Advisory Council Installation Dinner at East Rutherford High School, beginning at 6:30 PM on Tuesday, October 17. I spoke with Chairman Morrow on Thursday about the program's contents, and I am working with Mr. Garland to finalize those details now. Please email me to let me know whether or not you plan to attend so that we can arrange for appropriate seating and include you in the program as we finalize its contents and send it along for printing.

Finance Officer Vacancy

On Tuesday afternoon, I conducted a first round of interviews with the three applicants for our finance officer vacancy who meet or exceed the State Board of Education's minimum qualifications for the position. Results were encouraging. While one applicant would probably struggle a great deal to make the transition from her current role to one in the public education setting, a second candidate could likely make that transition over time, and a third candidate is likely equipped with the training, experience, knowledge, and professional poise to make that transition

gracefully. I have arranged a second round interview with the two strongest candidates for the position, to be held during the afternoon of Monday, October 16. Hank Hurd and Kathy Isenhour, who are working with us through HIL Consultants during this transitional period in our finance office, plan to join me for those second round interviews so that they can offer their expert assessments of both candidates' abilities in the arena of school finance.

In related news, I met with Mr. Hurd and Mrs. Isenhour earlier this week to define and outline several key projects for their work with our finance team. They worked with our finance office for much of the day on Wednesday. They have also identified the mentor who will work alongside interim finance officer Angie Ownbey – Debra Frisbee, who served as finance officer for Madison County Schools and Buncombe County Schools before joining HIL Consultants.

Organizationally, arrangements for transition support are much like I envisioned them. HIL Consultants will leverage their expertise to advance several critical projects and priorities within the finance department, and NCASBO mentor Debra Frisbee will work alongside Angie Ownbey in a consultative, coaching capacity to support her through key operational matters. I remain very impressed with HIL Consultants, and I believe their engagement with us is going to pay important dividends beyond simply helping us to navigate the transition associated with our current vacancy.

NCASA Update | Early Graduation & October State Board of Education Meeting

The North Carolina School Superintendents Association ("NCSSA"), North Carolina Association of School Administrators ("NCASA"), and other professional and advocacy organizations are pursuing legislative changes to the new state budget's language prohibiting local boards of education from establishing graduation requirements in excess of the minimum prescribed by the State Board of Education. In parallel work, the State Board earlier this week entertained a proposed policy that would allow local boards of education to exceed its minimum requirements, while still allowing for early graduation under certain conditions. I have included some related commentary from NCASA's *Leadership Link* newsletter that includes a few highlights from this week's meeting, along with a link to the proposed policy discussed by the State Board on Wednesday.

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Messages Worth Sharing

If you're like me, I would imagine that most of the messages you receive are from folks in search of help with a problem or concern. Such is the nature of the roles we hold! That makes it especially nice, though, to be surprised by messages just offered in the spirit of joy or pleasure. I received a couple messages like that this week, and I wanted to pass them along. Hopefully, they'll bring a smile to your faces like they did mine!

###

Good Afternoon Dr. Sutton,

Thank you for placing Mrs. Twitty at PES as our principal. I have been working at Pinnacle since we opened in 1999, so I have seen several principals come and go. We all have our own styles and do things differently while ultimately having the same end goals, educating students, meeting parent and community expectations, and creating a conducive school environment to name a few. I did not know what to expect and was somewhat apprehensive, when a new principal was coming on board to lead us during my last year of teaching, scary!! But suffice it to say, that I have been happy with her and the changes she is implementing. Thank you for

having the confidence in her to allow her to lead our school. This veteran teacher appreciates her leadership style.

Have a wonderful afternoon and evening.

Thanks for everything you do to lead us during these trying times.

Sincerely,

Leah Buckley
BS/MA Elementary Education
Appalachian State University
First Grade Teacher
Pinnacle Elementary School

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Dr. Sutton,

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Charley Melton
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828-288-2452
Ext 2459
cmelton@rcsnc.org

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Thanks, and have a good weekend.

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Attachments:

Operations Center Groundbreaking Program.pdf 868k

angelk@rcsnc.org Angel King
To: dsutton@rcsnc.org David Sutton

Wednesday, October 11, 2023 at 10:14:54 AM Eastern Daylight Time

Dr. Sutton,
I am planning to attend next Tuesday's LAC Installation. I look forward to seeing you then.

Thank you for the recent Board update,
Angel

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dsutton@rcsnc.org David Sutton
To: angelk@rcsnc.org Angel King

Wednesday, October 11, 2023 at 10:59:56 AM Eastern Daylight Time

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On Fri, Oct 6, 2023 at 10:59 PM David Sutton <dsutton@rcsnc.org> wrote:

Dear Board Members,

It was good seeing you earlier this week, and I hope you're all looking forward to a beautiful fall weekend. Following Tuesday's Board meeting, we held our monthly Leadership Team meeting on Wednesday, and, as you can imagine, there were a lot of good vibes in the air following assistant superintendent Renee Collins' presentation of school performance results from the 2022-2023 school year. The Rutherford County Schools Education Foundation treated our Leadership Team members to cake following the meeting, both to highlight a banner year for student achievement and National Principals Month, underway throughout the month of October. We were also happy to host school board attorney John Henning during the meeting, who provided our annual legal training session for school administrators. Customarily, we provide that training session on the day we reserve for our opening assembly and professional development activities as the new school year gets underway. However, given the pendency of several very important pieces of proposed legislation in early August, we deliberately held off until October to give those bills time to make their way through the legislative process. It paid off, and Mr. Henning was able to devote about two-and-a-half hours to the Parents' Bill of Rights, paid parental leave, school threat assessment teams, high school athletics administration, and other timely legal topics.

Throughout the week, OREd's individual interviews with local key informants continued during the land use study phase of the agency's broader work, and I was able to cap off a busy week with a great trip over to Isothermal

Community College this morning to join fifth graders from all of our elementary schools during this year's Conservation Field Day activities, sponsored and facilitated again this year by the Rutherford County Soil & Water Conservation District.

As the week draws to a close, I have included several informational items for you in today's update. Please don't hesitate to call me at your convenience on Monday if you need any additional information or have any related questions I can help to answer.

Reminder | Groundbreaking Ceremony

Please don't forget to mark your calendars for the groundbreaking ceremony for our new transportation and maintenance facilities. The ceremony will be held on the baseball field at the former R-S Middle School campus on Charlotte Road beginning at 11:00 AM on Tuesday, October 10. Following a ceremony that will include brief remarks and photo opportunities, refreshments will be available to attendees. Printed invitations have gone out, and I have attached a PDF version of the program for you below. Hope to see you there!

Local Advisory Council Installation Dinner

As noted on Tuesday's Board meeting agenda, we will hold our annual Local Advisory Council Installation Dinner at East Rutherford High School, beginning at 6:30 PM on Tuesday, October 17. I spoke with Chairman Morrow on Thursday about the program's contents, and I am working with Mr. Garland to finalize those details now. Please email me to let me know whether or not you plan to attend so that we can arrange for appropriate seating and include you in the program as we finalize its contents and send it along for printing.

Finance Officer Vacancy

On Tuesday afternoon, I conducted a first round of interviews with the three applicants for our finance officer vacancy who meet or exceed the State Board of Education's minimum qualifications for the position. Results were encouraging. While one applicant would probably struggle a great deal to make the transition from her current role to one in the public education setting, a second candidate could likely make that transition over time, and a third candidate is likely equipped with the training, experience, knowledge, and professional poise to make that transition gracefully. I have arranged a second round interview with the two strongest candidates for the position, to be held during the afternoon of Monday, October 16. Hank Hurd and Kathy Isenhour, who are working with us through HIL Consultants during this transitional period in our finance office, plan to join me for those second round interviews so that they can offer their expert assessments of both candidates' abilities in the arena of school finance.

In related news, I met with Mr. Hurd and Mrs. Isenhour earlier this week to define and outline several key projects for their work with our finance team. They worked with our finance office for much of the day on Wednesday. They have also identified the mentor who will work alongside interim finance officer Angie Ownbey – Debra Frisbee, who served as finance officer for Madison County Schools and Buncombe County Schools before joining HIL Consultants.

Organizationally, arrangements for transition support are much like I envisioned them. HIL Consultants will leverage their expertise to advance several critical projects and priorities within the finance department, and NCASBO mentor Debra Frisbee will work alongside Angie Ownbey in a consultative, coaching capacity to support her through key operational matters. I remain very impressed with HIL Consultants, and I believe their engagement with us is going to pay important dividends beyond simply helping us to navigate the transition associated with our current vacancy.

NCASA Update | Early Graduation & October State Board of Education Meeting

The North Carolina School Superintendents Association ("NCSSA"), North Carolina Association of School Administrators ("NCASA"), and other professional and advocacy organizations are pursuing legislative changes to the new state budget's language prohibiting local boards of education from establishing graduation requirements in excess of the minimum prescribed by the State Board of Education. In parallel work, the State Board earlier this week entertained a proposed policy that would allow local boards of education to

exceed its minimum requirements, while still allowing for early graduation under certain conditions. I have included some related commentary from NCASA's *Leadership Link* newsletter that includes a few highlights from this week's meeting, along with a link to the proposed policy discussed by the State Board on Wednesday.

October State Board of Education Meeting Summary

The State Board of Education (SBE) held its latest monthly meeting on October 4-5, during which members discussed the limitations of the new parental concern hearing process required by the Parents' Bill of Rights, as well as a proposed policy allowing local school boards to exceed the minimum graduation requirements established by the SBE. The latter discussion item was added to this month's meeting agenda as a result of ongoing district concerns over a new provision in the 2023 state budget forbidding local districts from requiring additional graduation requirements above the state minimum, which is currently 22 credits. The policy, which provides an option for students to graduate from high school a year early with parental permission if they have met the 22 credits and other requirements, is expected to be voted on by SBE members in November, if lawmakers agree to a technical change in the budget pursued by the SBE, NCASA, and other public education advocates. Read more about the October SBE meeting [HERE](#).

Messages Worth Sharing

If you're like me, I would imagine that most of the messages you receive are from folks in search of help with a problem or concern. Such is the nature of the roles we hold! That makes it especially nice, though, to be surprised by messages just offered in the spirit of joy or pleasure. I received a couple messages like that this week, and I wanted to pass them along. Hopefully, they'll bring a smile to your faces like they did mine!

###

Good Afternoon Dr. Sutton,

Thank you for placing Mrs. Twitty at PES as our principal. I have been working at Pinnacle since we opened in 1999, so I have seen several principals come and go. We all have our own styles and do things differently while ultimately having the same end goals, educating students, meeting parent and community expectations, and creating a conducive school environment to name a few. I did not know what to expect and was somewhat apprehensive, when a new principal was coming on board to lead us during my last year of teaching, scary!! But suffice it to say, that I have been happy with her and the changes she is implementing. Thank you for having the confidence in her to allow her to lead our school. This veteran teacher appreciates her leadership style.

Have a wonderful afternoon and evening.

Thanks for everything you do to lead us during these trying times.

Sincerely,

Leah Buckley
BS/MA Elementary Education
Appalachian State University
First Grade Teacher
Pinnacle Elementary School

###

Dr. Sutton,

Last night at the board meeting was a moment of great joy for me as I sat listening to Dr. Collins report on our student scores and how they compared against our neighbors and across state. I couldn't help but write to you this morning thanking you for your leadership and steadfastness in very trying times. We have

great principals, teachers, and staff here in RCS and last night was a testament to that fact. But, those types of results across our LEA start with you at the top and your vision and determination. I am hoping these results open many eyes across our county as we move forward. Thank you and congratulations!

--

Sincerely,

Charley Melton
Director of Transportation
Rutherford County Schools
828-288-2452
Ext 2459
cmelton@rcsnc.org

###

NCSBA Legislative Update

Earlier today, the North Carolina School Boards Association (NCSBA) published its regular Legislative Update. Today's edition includes some commentary about state and federal budgets, a synopsis of education-related legislation, and an overview of this week's State Board of Education meeting. I will forward it to each of you in case you didn't receive a copy directly from the organization.

Thanks, and have a good weekend.

David M. Sutton, Ed.D.
Superintendent
Rutherford County Schools
382 West Main Street | Forest City, NC 28043
Phone 828.288.2200 | Fax 828.288.2490

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Re: [EXTERNAL] Re: Aux Cable

smihailovich@edulog.com Sara Mihailovich

Tuesday, December 5, 2023 at 3:49:10 PM Eastern Standard Time

To: cmelton@rcsnc.org Charley Melton Jr, kyle.vanthof@samsara.com Kyle VanThof, dgraham@edulog.com Derek Graham

Perfect, I sent you an invite. @Kyle VanThof and @Derek Graham I included you as well if you would like to join.

Thanks,
Sara

From: Charley Melton Jr <cmelton@rcsnc.org>**Sent:** Tuesday, December 5, 2023 1:42 PM**To:** Sara Mihailovich <smihailovich@edulog.com>**Cc:** Derek Graham <dgraham@edulog.com>, Kyle VanThof <kyle.vanthof@samsara.com>**Subject:** Re: [EXTERNAL] Re: Aux Cable

Tomorrow at 1:30 works well for me.

On Tue, Dec 5, 2023 at 3:38 PM Sara Mihailovich <smihailovich@edulog.com> wrote:

Hi Charley,

I think Derek had magnets in his cornhole bags that made his stick to the boards. I'll be ready for a rematch in Asheville as well. 😊

I'd be happy to schedule some time to show you the Edulog tablet software that provides digital route sheets to the drivers as well as the driver time and attendance system. Do you have availability tomorrow between 1:30-4pm ET? I also have availability on Friday between 10:30 and Noon ET or between 1pm and 3pm ET. Let me know if any of those times work for you. If next week is better, let me know what day you prefer, and I'll send an invite.

Thanks!
Sara

From: Charley Melton Jr <cmelton@rcsnc.org>**Sent:** Tuesday, December 5, 2023 9:24 AM**To:** Derek Graham <dgraham@edulog.com>**Cc:** Kyle VanThof <kyle.vanthof@samsara.com>, Sara Mihailovich <smihailovich@edulog.com>**Subject:** Re: [EXTERNAL] Re: Aux Cable

Derek, I am pretty sure my cornhole bags were possibly missing some kernels. A full investigation will be required at this point.

I spoke with Scott last week and how he has implemented some of the features. Thanks for your help.

On Tue, Dec 5, 2023 at 11:20 AM Derek Graham <dgraham@edulog.com> wrote:

Well looky here – Charley and Sara – on the same email. Two of our Cornhole victims! LOL!! What a fluke that was!

Charley – Edulog does Time/Attendance on tablets and those tablets also select routes and do turn by turn based on TIMS.

Sara can show you all that.

Union has done a great job implementing if you are over that way sometime....

Derek Graham | Consultant

Phone: 919.771.8443 | Fax: 406.728.8754

Education Logistics, Inc. | www.edulog.com

From: Kyle VanThof <kyle.vanthof@samsara.com>
Sent: Tuesday, December 5, 2023 10:56 AM
To: Charley Melton Jr <cmelton@rcsnc.org>; Sara Mihalovich <smihalovich@edulog.com>; Derek Graham <dgraham@edulog.com>
Subject: Re: [EXTERNAL] Re: Aux Cable

Charley,



I have cc'd Sara and Derek on the Edulog team that should be able to assist you with Time and Attendance information.



Kyle VanThof
Public Sector Sr. Account Executive

C: 585.770.4409
E: kyle.vanthof@samsara.com

samsara.com  

 REFERRALS  EVENTS  SUPPORT

On Tue, Dec 5, 2023 at 10:54 AM Charley Melton Jr <cmelton@rcsnc.org> wrote:

One more question, do you happen to have a contact person/number for Edulog concerning time and attendance?

On Tue, Dec 5, 2023 at 7:38 AM Charley Melton Jr <cmelton@rcsnc.org> wrote:

Sounds good.

On Tue, Dec 5, 2023 at 7:34 AM Kyle VanThof <kyle.vanthof@samsara.com> wrote:




I can call you when I finish my 10 am call



Kyle VanThof
Public Sector Sr. Account Executive

C: 585.770.4409
E: kyle.vanthof@samsara.com

samsara.com  

 REFERRALS  EVENTS  SUPPORT

On Tue, Dec 5, 2023 at 7:29 AM Charley Melton Jr <cmelton@rcsnc.org> wrote:

Sounds good, talk to you then. Do you want to call me or me call you?

On Tue, Dec 5, 2023 at 7:27 AM Kyle VanThof <kyle.vanthof@samsara.com> wrote:

Morning Charley,

Happy to chat, I am available at 10:30 AM if that works for you. Any time after that works for me.



Kyle VanThof

Public Sector Sr. Account Executive

C: 585.770.4409

E: kyle.vanthof@samsara.com

samsara.com

REFERRALS EVENTS SUPPORT

On Tue, Dec 5, 2023 at 6:57 AM Charley Melton Jr <cmelton@rcsnc.org> wrote:

Good morning,

Do you have time to speak today or tomorrow concerning the quote?

On Fri, Dec 1, 2023 at 1:10 PM Kyle VanThof <kyle.vanthof@samsara.com> wrote:

I believe in theory yes. With me not knowing much about it at all.



Kyle VanThof

Public Sector Sr. Account Executive

C: 585.770.4409

E: kyle.vanthof@samsara.com

samsara.com

REFERRALS EVENTS SUPPORT

On Fri, Dec 1, 2023 at 1:07 PM Charley Melton Jr <cmelton@rcsnc.org> wrote:

In theory if we activated wifi and had our own tablets, a driver could clock in and out on our web based timekeeper and there would be no need to upload data into our system at all.

On Fri, Dec 1, 2023 at 11:49 AM Kyle VanThof <kyle.vanthof@samsara.com> wrote:

Charley,

Here is the Samsara quote for the 120 vehicles. Has the team made any progress on getting out of Safe Fleet?



Kyle VanThof
Public Sector Sr. Account Executive

C: 585.770.4409
E: kyle.vanthof@samsara.com

samsara.com
REFERRALS EVENTS SUPPORT

On Fri, Dec 1, 2023 at 11:35 AM Kyle VanThof <kyle.vanthof@samsara.com> wrote:

I am getting the approved quote now.

The GPS with Samsara was submitted for \$15.99/ vehicle per month.

If you were to add on Edulog, the GPS with wifi would be \$22/ vehicle per month.



Kyle VanThof
Public Sector Sr. Account Executive

C: 585.770.4409
E: kyle.vanthof@samsara.com

samsara.com
REFERRALS EVENTS SUPPORT

On Fri, Dec 1, 2023 at 11:19 AM Charley Melton Jr <cmelton@rcsnc.org> wrote:

Can you add wifi as a separate price point?

On Fri, Dec 1, 2023 at 11:15 AM Kyle VanThof <kyle.vanthof@samsara.com> wrote:

I dont have any pricing for Edulog, I just wanted to make sure not to add on WFI right now since you wont need it at the moment.



Kyle VanThof

Public Sector Sr. Account Executive

C: 585.770.4409

E: kyle.vanthof@samsara.com

samsara.com

REFERRALS EVENTS SUPPORT

On Fri, Dec 1, 2023 at 11:14 AM Charley Melton Jr <cmelton@rcsnc.org> wrote:

If you can do both that would be great. But probably not going with edulog right now.

On Fri, Dec 1, 2023 at 11:10 AM Kyle VanThof <kyle.vanthof@samsara.com> wrote:

Charley - you weren't speaking with Edulog right? You just need the basic Samsara GPS?



Kyle VanThof

Public Sector Sr. Account Executive

C: 585.770.4409

E: kyle.vanthof@samsara.com

samsara.com

REFERRALS EVENTS SUPPORT

On Fri, Dec 1, 2023 at 10:51 AM Charley Melton Jr <cmelton@rcsnc.org> wrote:

Thank you sir!

Kyle,

Will you put together a price for our vehicles? With a breakdown of 110 buses and 10 service vehicles.

Thanks,

Charley

On Fri, Dec 1, 2023 at 9:49 AM Kyle VanThof <kyle.vanthof@samsara.com> wrote:

Hi Charley,

I am looping in my Engineer Alex to our conversation here.



Kyle VanThof
Public Sector Sr. Account Executive

C: 585.770.4409
E: kyle.vanthof@samsara.com

samsara.com
REFERRALS EVENTS SUPPORT

On Tue, Nov 28, 2023 at 12:43 PM Charley Melton Jr <cmelton@rcsnc.org> wrote:

Hello sir,

We currently use a FileMaker database system to handle our work orders and drivers (licenses, renewals, drug screening etc.) along with keeping track of our buses, trucks and vans. I see in Samsara there is a location for service logs, maintenance and driver documents. My thought is could Samsara be used to send work orders to mechanics? Is there a place for this already or could it be developed?

Thanks,

Charley

On Wed, Nov 15, 2023 at 8:48 AM Kyle VanThof <kyle.vanthof@samsara.com> wrote:

Good Morning Charley,

Do you know what Aux the 8 way is on. You can go to the vehicle, then settings and change the Aux.



Kyle VanThof

Public Sector Sr. Account Executive

C: 585.770.4409

E: kyle.vanthof@samsara.com

samsara.com  

 REFERRALS  EVENTS  SUPPORT

On Wed, Nov 15, 2023 at 6:29 AM Charley Melton Jr <cmelton@rcsnc.org> wrote:

Good morning sir,

We have installed at least one of the aux cab on bus 69. How do I now see the data we are looking for? We are hoping to see eight ways etc.

--

Sincerely,

Charley Melton
Director of Transportation
Rutherford County Schools
828-288-2452
Ext 2459
cmelton@rcsnc.org

Successful Education Starts With A Safe Journey

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Sincerely,

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Attachments:

image001.png 71k

Re: [EXTERNAL] Checking In

debsdesigns62@gmail.com Deborah Frisby
To: jkelly@rcsnc.org Jolie Kelly

Tuesday, January 30, 2024 at 9:23:05 AM Eastern Standard Time

Okay let me know if you need help with anything. Thanks. Have a great day.

On Tue, Jan 30, 2024 at 9:05 AM Jolie Kelly <jkelly@rcsnc.org> wrote:
All is well. Working through the to do list fo the board meeting.

Jolie Kelly, CPA, CPFO
Chief Finance Officer
828-288-2240
Rutherford County Schools
382 West Main Street
Forest City, NC 28043

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828-288-2240

On Tue, Jan 30, 2024 at 8:48 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:
Good morning! Happy Tuesday!

How are you? How are things going there?

Sent from my iPhone

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Comparison County Schools Review

jkelly@rcsnc.org Jolie Kelly

Tuesday, January 30, 2024 at 9:03:18 AM Eastern Standard Time

To: dsutton@rcsnc.org David Sutton, reneec@rcsnc.org Renee Collins, tash@rcsnc.org Tammie Ash, bteague@rcsnc.org
Brad Teague, debsdesigns62@gmail.com Deborah Frisby

Good morning,

Here is the short list of county schools for consideration as a benchmark for RCS. I chose the counties to review based on general population and school enrollment. These are the factors that I felt were relevant. If there are other data points you think should be considered, please let me know and I will search for them. The only data point that I would have liked to add was the taxable real estate assessment values, however, that was not consistently available online.

Of interest is the fact that the three that I feel are most aligned are receiving significantly more funding from their county. In every case I was very careful to remove budgets for capital and debt service for the schools and to make sure that I was only including county schools.

Thank you for your time to review this document.

Jolie Kelly, CPA, CPFO
Chief Finance Officer
828-288-2240
Rutherford County Schools
382 West Main Street
Forest City, NC 28043

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Attachments:

Comparison Counties - Benchmark.xlsx 15k

Re: [EXTERNAL] PRC 073

debsdesigns62@gmail.com Deborah Frisby
To: aownbey@rcsnc.org Angie Ownbey

Monday, January 29, 2024 at 4:02:46 PM Eastern Standard Time

Awww thanks! I made a new friend too! 🥳

On Mon, Jan 29, 2024 at 4:01 PM Angie Ownbey <aownbey@rcsnc.org> wrote:

The best thing from all of this is I made a new friend. 🥳

On Mon, Jan 29, 2024 at 4:00 PM Deborah Frisby <debsdesigns62@gmail.com> wrote:

It's my pleasure. I enjoy working with you and the Finance team. 😊

On Mon, Jan 29, 2024 at 3:52 PM Angie Ownbey <aownbey@rcsnc.org> wrote:

Definitely! Thank you for helping through all the changes. I could not do it without you. I am just ready to get off this roller coaster ride.

On Mon, Jan 29, 2024 at 3:37 PM Deborah Frisby <debsdesigns62@gmail.com> wrote:

Hi Angie,

Yes, I know Shannon well. Hopefully things will start stabilizing soon. You've had enough changes for a day or two right?.

On Mon, Jan 29, 2024 at 3:31 PM Angie Ownbey <aownbey@rcsnc.org> wrote:

Thank goodness. One less thing to move. We just found out today that Vinci our auditor is scaling back so we will have a new lead auditor Shannon Dennisoim. I believe she said she knew you. I am tired of changes.

On Mon, Jan 29, 2024 at 9:40 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:

Good morning! I hope you had a wonderful weekend!

I noticed that an allotment revision came through for PRC 073. YAY! You will not have to move those transactions for PRC 015. Thanks!

How is everything going?

--

Angie Ownbey
Assistant Finance Officer
Rutherford County Schools
382 West Main St
Forest City, NC 28043
828-288-2246 phone
828-288-2490 fax
aownbey@rcsnc.org

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--

Angie Ownbey
Assistant Finance Officer
Rutherford County Schools
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—
Angie Ownbey
Assistant Finance Officer
Rutherford County Schools
382 West Main St
Forest City, NC 28043
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828-288-2490 fax
aownbey@rcsnc.org

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Re: [EXTERNAL] Re: IDEA Grant Award

jkelly@rcsnc.org Jolie Kelly
To: debsdesigns62@gmail.com Deborah Frisby

Monday, January 29, 2024 at 1:38:53 PM Eastern Standard Time

Sure - I've already done 073.

Jolie Kelly, CPA, CPFO
Chief Finance Officer
828-288-2240
Rutherford County Schools
382 West Main Street
Forest City, NC 28043

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828-288-2240

On Mon, Jan 29, 2024 at 1:36 PM Deborah Frisby <debsdesigns62@gmail.com> wrote:

Hey Jolie! Can we talk about this on Wednesday? These are a little complicated. You can go ahead and enter the journal entry for PRC 073..

Sent from my iPhone

On Jan 29, 2024, at 1:26 PM, Jolie Kelly <jkelly@rcsnc.org> wrote:

In allotment #31 there is \$5,500 for PRC 118. That is a different amount from the two award letters (\$9,500 and \$4,000). Is this entered in Linq as a BJ?

<image.png>

Jolie Kelly, CPA, CPFO
Chief Finance Officer
828-288-2240
Rutherford County Schools
382 West Main Street
Forest City, NC 28043

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828-288-2240

On Mon, Jan 29, 2024 at 10:43 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:
Finance will have to enter the budget in LINQ eventually since you received the GAN letter. We can discuss further on Wednesday if needed.

On Mon, Jan 29, 2024 at 10:39 AM Jolie Kelly <jkelly@rcsnc.org> wrote:
I didn't enter anything in budget builder or fund manager. I emailed the person over this grant to make sure they were aware of the awards, as they are not currently in budget builder.

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On Mon, Jan 29, 2024 at 10:37 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:
The process is different for federal funds and only federal budgets are entered in Budget Builder. I just wanted to make sure that the budget you enter in LINQ matches the budget in Budget Builder hence the reason for the report. The revenue code will be 3.3600.PRC if that helps.

On Mon, Jan 29, 2024 at 10:34 AM Jolie Kelly <jkelly@rcsnc.org> wrote:
I talked with Angie. I understand from her that the budget builder is just for federal funds now that the original budget has been submitted. Apparently, the person that works with each federal program enters them in the budget builder and I approve them and export them to DPI for approval.

They (whoever that is) don't make this easy to learn.

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On Mon, Jan 29, 2024 at 10:24 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:
Hi Jolie,

No, you will have to prepare and enter a budget journal entry in LINQ. However, the budget has been loaded in Budget Builder and you will need to use that budget for your journal entry. Go to Budget Builder, Tab labeled reports, scroll to total budget, select the PRC you want, hit refresh and that should give you the budget that has been loaded. Use that report to build your budget journal entry to enter into LINQ. Does this make sense?

Let me know if you have any questions or if I may help you navigate through Budget Builder.

On Mon, Jan 29, 2024 at 10:12 AM Jolie Kelly <jkelly@rcsnc.org> wrote:
I'm ok.

So the IDEA is not a Linq budget amendment, but you do it in Budget Builder? I have not been in there yet.

Yes, I say #33 this morning. I will get it in there today so it can be part of the BOE agenda item.

Thanks,

Jolie

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On Mon, Jan 29, 2024 at 9:42 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:
On another note, I noticed allotment revision #033 dropped with money for PRC 073. This will eliminate a negative line item in the State Public School Fund once you post that budget journal entry. YAY!

How are things going there?

On Mon, Jan 29, 2024 at 9:37 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:

Good morning Jolie! I hope you had a wonderful weekend!

Yes, you will have to do an amendment. You will be able to find a budget for these two PRCs in Budget Builder. Do you know how to look that up? Thanks!

On Mon, Jan 29, 2024 at 8:38 AM Jolie Kelly <jkelly@rcsnc.org> wrote:
Good Morning,

We have received two grant awards for IDEA. I am assuming that we need to do a budget amendment for these awards seeing there is nothing in the system yet.

Please review and let me know if I've got this right.

Thanks,

Jolie

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Re: [EXTERNAL] Re: PRC 882

jkelly@rcsnc.org Jolie Kelly
To: debsdesigns62@gmail.com Deborah Frisby

Friday, January 26, 2024 at 4:05:39 PM Eastern Standard Time

I hope you have a great weekend too. Here is my draft of the school budgets, PRC 061 and 882. You had already done most of the work on 061. So Mr. Torvinen has some money in there (location 340). Only the green tabs on the Excel are for this work.

Thanks,

Jolie

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828-288-2240

On Fri, Jan 26, 2024 at 4:03 PM Deborah Frisby <debsdesigns62@gmail.com> wrote:
Thanks Jolie! I hope you have a great weekend!

Sent from my iPhone

On Jan 26, 2024, at 12:31 PM, Jolie Kelly <jkelly@rcsnc.org> wrote:

Seeing you are offline a bit today, I also asked Angie about the discretionary PRC. Here's the answer.

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Forwarded Conversation**Subject: PRC 882**

jkelly@rcsnc.org

aownbey@rcsnc.org

Can you tell me anything about PRC 882 - Discretionary. At whose discretion? I'm wondering if we can move money from 882 to 801.

Thanks,

Jolie

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From: Angie Ownbey <aownbey@rcsnc.org>

To: jkelly@rcsnc.org

The 882 funds are allotted to the schools to spend at their discretion for other than instructional items if necessary. It is part of that school allotment worksheet and is calculated based on the ADM. The schools are given funds in 2.061 and 2.882. There is an allotment to high school bands that can carry over each year. Also, there is an allotment for the school nurses to purchase supplies at each school.

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—
Angie Ownbey
Assistant Finance Officer
Rutherford County Schools
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828-288-2246 phone

828-288-2490 fax
aownbey@rcsnc.org

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jkelly@rcsnc.org

aownbey@rcsnc.org

Thank you for the clarification.

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Attachments:

JE Template.xlsx 1.0M

Re: [EXTERNAL] Re: School Budgets

jkelly@rcsnc.org Jolie Kelly
To: **debsdesigns62@gmail.com** Deborah Frisby

Friday, January 26, 2024 at 11:49:35 AM Eastern Standard Time

Thanks

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On Fri, Jan 26, 2024 at 11:49 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:
YOU'RE DOING A FABULOUS JOB!!!! 😊

On Fri, Jan 26, 2024 at 11:47 AM Jolie Kelly <jkelly@rcsnc.org> wrote:
Just hope I don't do it the hard way (like last thing I tired) LOL

Working on the Finance Budget now as a practice run.

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On Fri, Jan 26, 2024 at 11:46 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:
Perfect...thanks!

On Fri, Jan 26, 2024 at 11:11 AM Jolie Kelly <jkelly@rcsnc.org> wrote:
ok, I'm going to work on something for Wednesday to talk over.

Thanks,

Jolie

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On Fri, Jan 26, 2024 at 11:10 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:
I think it is mainly local Funds.

On Fri, Jan 26, 2024 at 11:09 AM Jolie Kelly <jkelly@rcsnc.org> wrote:
Yes, I don't think he is worried about the staff numbers.

I would like to work on this, but I'm not sure if it is just local funds, or would it include funds 1 and 3.

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On Fri, Jan 26, 2024 at 11:07 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:
Hi Jolie,

Do you think this principal is referring to the supplies and materials allotment that me, you and Angie discussed?

On Fri, Jan 26, 2024 at 9:39 AM Jolie Kelly <jkelly@rcsnc.org> wrote:
So I had another principal come in yesterday wanting to know when he was going to get his "school budget."

For the school budgets they are asking for, I'm assuming they are only talking about non-personnel

lines, but would that cross over funds? Or is it just fund 2.

Right now I am looking at the three over budget PRCs in Fund 2. Some of it is due to POs, but I'm still interested in why we are letting POs with no available budget to support them. Then I'll look at the other funds.

Thanks,

Jolie

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Re: [EXTERNAL] Re: PRC 882 - Discretionary

jkelly@rcsnc.org Jolie Kelly
To: debsdesigns62@gmail.com Deborah Frisby

Friday, January 26, 2024 at 11:11:58 AM Eastern Standard Time

Ok, let me know. Thanks

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On Fri, Jan 26, 2024 at 11:11 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:

Let me look at that this evening. I do not have that laptop with me today. 🙄🙄

On Fri, Jan 26, 2024 at 11:10 AM Jolie Kelly <jkelly@rcsnc.org> wrote:

What is this PRC and at whose discretion? PRC needs more money, can you move funds from 882 to 801?

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Re: [EXTERNAL] Re: SRO

debsdesigns62@gmail.com Deborah Frisby
To: jkelly@rcsnc.org Jolie Kelly

Friday, January 26, 2024 at 11:11:44 AM Eastern Standard Time

You're welcome!

On Fri, Jan 26, 2024 at 11:08 AM Jolie Kelly <jkelly@rcsnc.org> wrote:
ok, thanks

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On Fri, Jan 26, 2024 at 11:06 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:
Hi Jolie,

There was a communication from the Center of Safer Schools stating that more money for Safe Schools had been awarded. There were not any details with the communication. Dr. Teague might know more.

Yes, I agree with your statement about the PO. We do not need things out of whack, right?

On Fri, Jan 26, 2024 at 10:16 AM Jolie Kelly <jkelly@rcsnc.org> wrote:
Did you say that we were getting more SRO money the other day? If so, I would assume that it is from the State. Looking at the Fund 2 budget and SROs (039) are over budget, including POs, by approximately \$161,000.

After reviewing the PO against the latest bill it appears that there have been several change in officers. The PO is for an entire year. Would it make sense to only let a PO for 6 months? I think this is way out of wack now.

Thanks,

Jolie

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Re: [EXTERNAL] Re: Teacher Code

jkelly@rcsnc.org Jolie Kelly

To: debsdesigns62@gmail.com Deborah Frisby

Friday, January 26, 2024 at 9:20:07 AM Eastern Standard Time

Yes, we would have to move someone out of 001 and I agree that is the better place from a budget standpoint. I don't know the qualifications for 103 teachers, or if there are any.

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On Fri, Jan 26, 2024 at 9:12 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:

Good morning! Happy Friday! I would suggest putting her in State PRC 001. What is the criteria for being paid out of PRC 103? Is there someone in PRC 001, that is lower paid, that we can push to PRC 103. We will have to free up a position in PRC 001.

Jolie, what are your thoughts?

Sent from my iPhone

On Jan 26, 2024, at 9:07 AM, Angie Ownbey <aownbey@rcsnc.org> wrote:

Good morning,

We hired a teacher to replace one that had resigned. The former teacher was paid from federal PRC 103. The new teacher had an expired license so she was put at pay A0 and in local. She now has an active license with Master pay at step 15 which is 5,837 per month. Where should I put her State or ESSER? I am sure Dr. Silver doesn't want her in 103 since she is highly paid.

Thanks

--

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aownbey@rcsnc.org

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[EXTERNAL] Re: Teacher Code

debsdesigns62@gmail.com Deborah Frisby

Friday, January 26, 2024 at 9:12:20 AM Eastern Standard Time

To: aownbey@rcsnc.org Angie Ownbey

Cc: jkelly@rcsnc.org Jolie Kelly

Good morning! Happy Friday! I would suggest putting her in State PRC 001. What is the criteria for being paid out of PRC 103? Is there someone in PRC 001, that is lower paid, that we can push to PRC 103. We will have to free up a position in PRC 001.

Jolie, what are your thoughts?

Sent from my iPhone

On Jan 26, 2024, at 9:07 AM, Angie Ownbey <aownbey@rcsnc.org> wrote:

Good morning,

We hired a teacher to replace one that had resigned. The former teacher was paid from federal PRC 103. The new teacher had an expired license so she was put at pay A0 and in local. She now has an active license with Master pay at step 15 which is 5,837 per month. Where should I put her State or ESSER? I am sure Dr. Silver doesn't want her in 103 since she is highly paid.

Thanks

—
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Assistant Finance Officer
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828-288-2490 fax
aownbey@rcsnc.org

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Re: [EXTERNAL] Check In

debsdesigns62@gmail.com Deborah Frisby
To: jkelly@rcsnc.org Jolie Kelly

Thursday, January 25, 2024 at 3:19:00 PM Eastern Standard Time

She's a workhorse!

On Thu, Jan 25, 2024 at 2:47 PM Jolie Kelly <jkelly@rcsnc.org> wrote:
Sitting with Angie on Reqs and POs. She won't let me quit.

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On Thu, Jan 25, 2024 at 2:46 PM Deborah Frisby <debsdesigns62@gmail.com> wrote:
Hi Jolie,

How is your afternoon going? Is there anything I may help you with?

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Re: [EXTERNAL] PRC 055 Current Payroll Assignments

debsdesigns62@gmail.com Deborah Frisby
To: jkelly@rcsnc.org Jolie Kelly

Thursday, January 25, 2024 at 9:59:15 AM Eastern Standard Time

Hi Jolie,

Thanks for this information. We can discuss again once he sends you his requested funds.

On Thu, Jan 25, 2024 at 9:49 AM Jolie Kelly <jkelly@rcsnc.org> wrote:

FYI - All of the staff in 055 have been confirmed by Mr. McCluney and Mrs. Carpenter as working at the facility. To get him more money we have to at least move someone. I wonder if he really needs 3 TAs.

He has not provided his requested funds fo the next 6 month yet.

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On Wed, Jan 24, 2024 at 2:43 PM Deborah Frisby <debsdesigns62@gmail.com> wrote:

Hi Jolie,

This document is attached.

Let me know if you have any questions. Thanks! Have a great evening!

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Re: [EXTERNAL] Budget Journal Entry for State PRC 009 and PRC 011

debsdesigns62@gmail.com Deborah Frisby
To: jkelly@rcsnc.org Jolie Kelly

Thursday, January 25, 2024 at 8:44:20 AM Eastern Standard Time

You're most welcome! Sometimes my brain is slow... Have a good day! I'll touch base with you a little later

Sent from my iPhone

On Jan 25, 2024, at 8:43 AM, Jolie Kelly <jkelly@rcsnc.org> wrote:

Ok, thanks.

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On Thu, Jan 25, 2024 at 8:42 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:

And it dawned on me that that code is probably set up, but it's at a location not the parent account. That's probably why that code is not showing in the system since the longevity was paid at a location.

Sent from my iPhone

On Jan 25, 2024, at 8:40 AM, Jolie Kelly <jkelly@rcsnc.org> wrote:

Ok I'll review it with her, thanks.

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including law enforcement.
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On Thu, Jan 25, 2024 at 8:39 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:
Good morning! Happy Thursday. There was a longevity payment made out of a 7000 series purpose function code last year so I concluded that that person would get longevity again. Angie might be able to help you with that. And I could've used the wrong code. 😊
Sent from my iPhone

On Jan 25, 2024, at 8:32 AM, Jolie Kelly <jkelly@rcsnc.org> wrote:

Question - the code 1.7200.009.184, I think 7200 is nutrition services. Is that correct? We don't currently show that purpose code in 009.

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On Wed, Jan 24, 2024 at 3:41 PM Deborah Frisby <debsdesigns62@gmail.com> wrote:

Hi Jolie,

This entry is attached.

Let me know if you have any questions. Thanks!

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monitoring and disclosure to third parties, including law enforcement.*

Re: [EXTERNAL] Payroll Assignment Moves to PRC 181

jkelly@rcsnc.org Jolie Kelly

To: debsdesigns62@gmail.com Deborah Frisby

Cc: aownbey@rcsnc.org Angie Ownbey

Wednesday, January 24, 2024 at 3:40:08 PM Eastern Standard Time

I'm fine with it.

Jolie Kelly, CPA, CPFO
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On Wed, Jan 24, 2024 at 3:39 PM Deborah Frisby <debsdesigns62@gmail.com> wrote:

I'm okay with moving her. I may or may not have gone over the 10 positions a smidge. 😊😊 As long as Jolie is cool with it! Thanks!

On Wed, Jan 24, 2024 at 3:36 PM Angie Ownbey <aownbey@rcsnc.org> wrote:

Christine Stines started on January 4th. Do we need to move a different employee?

On Wed, Jan 24, 2024 at 12:22 PM Deborah Frisby <debsdesigns62@gmail.com> wrote:

Good afternoon,

Please find attached this spreadsheet for additional payroll assignment moves to PRC 181. These moves are effective back to the beginning of the 2023-24 fiscal/school year.

These moves were discussed and approved at the ESSER III spenddown meeting held on January 12th.

Please let me know if you have any questions or concerns. Thanks so much! Have a great afternoon!

--

Angie Ownbey
Assistant Finance Officer
Rutherford County Schools
382 West Main St
Forest City, NC 28043
828-288-2246 phone
828-288-2490 fax
aownbey@rcsnc.org

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Allotment Entries

jkelly@rcsnc.org Jolie Kelly
To: debsdesigns62@gmail.com Deborah Frisby

Wednesday, January 24, 2024 at 10:20:16 AM Eastern Standard Time

Jolie Kelly, CPA, CPFO
Chief Finance Officer
828-288-2240
Rutherford County Schools
382 West Main Street
Forest City, NC 28043

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828-288-2240

Attachments:

Allotment #27.xlsx 23k

Allotment #29.xlsx 19k

[EXTERNAL] Re: Over Budget PRCs

debsdesigns62@gmail.com Deborah Frisby
To: jkelly@rcsnc.org Jolie Kelly

Tuesday, January 23, 2024 at 5:03:11 PM Eastern Standard Time

Good afternoon! I'll be ready!!!

Let me review this. I'll let you know!

Have a great evening!

Sent from my iPhone

On Jan 23, 2024, at 4:55 PM, Jolie Kelly <jkelly@rcsnc.org> wrote:

Good afternoon,

We've got a lot to talk about tomorrow.

Here is an over budget PRC document that I put together. Will this work or is there an easier way?

Thanks,

Jolie

Jolie Kelly, CPA, CPFO
Chief Finance Officer
828-288-2240
Rutherford County Schools
382 West Main Street
Forest City, NC 28043

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<Over Budget Report 1-23-24.xlsx>

Re: [EXTERNAL] Checking in

debsdesigns62@gmail.com Deborah Frisby
To: jkelly@rcsnc.org Jolie Kelly

Tuesday, January 23, 2024 at 10:19:06 AM Eastern Standard Time

No problem . Let me know if you need any help.

Sent from my iPhone

On Jan 23, 2024, at 10:18 AM, Jolie Kelly <jkelly@rcsnc.org> wrote:

Ok, I think I can go from here. I just need to make sure it's the same level of school for the grant.

Thanks!

Jolie Kelly, CPA, CPFO
Chief Finance Officer
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Forest City, NC 28043

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828-288-2240

On Tue, Jan 23, 2024 at 10:16 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:
Yes you are correct!

On Tue, Jan 23, 2024 at 10:15 AM Jolie Kelly <jkelly@rcsnc.org> wrote:
So if I look at PRC 031 and then look at the location codes, like 350, with money expended that would tell me that Forrest Hunt Elem. received these funds?

<image.png>

Jolie Kelly, CPA, CPFO
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828-288-2240

On Tue, Jan 23, 2024 at 9:29 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:
Okay let me look at that allotment.
Sent from my iPhone

On Jan 23, 2024, at 9:23 AM, Jolie Kelly <jkelly@rcsnc.org> wrote:

I need to identify one school within our District that receives these funds and write something for a grant application.

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On Tue, Jan 23, 2024 at 8:46 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:
Low wealth money is in PRC 031. Rutherford receives these funds.

If you need to know what other districts receive low wealth money, I can send you info about that.

Sent from my iPhone

On Jan 23, 2024, at 8:44 AM, Jolie Kelly <jkelly@rcsnc.org> wrote:

On more question. How can I tell if a school has received low wealth supplemental funding?

Jolie Kelly, CPA, CPFO
Chief Finance Officer
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382 West Main Street
Forest City, NC 28043

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828-288-2240

On Tue, Jan 23, 2024 at 8:40 AM Jolie Kelly <jkelly@rcsnc.org> wrote:
PRC is better! Sure, that works for me.

Jolie Kelly, CPA, CPFO
Chief Finance Officer
828-288-2240
Rutherford County Schools
382 West Main Street
Forest City, NC 28043

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828-288-2240

On Tue, Jan 23, 2024 at 8:39 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:

No, that should be by PRC in the state budget. I will look at those today and we can correct tomorrow.
Will that work for you?

Sent from my iPhone

On Jan 23, 2024, at 8:37 AM, Jolie Kelly <jkelly@rcsnc.org> wrote:

Good morning,

Angie said that we need to check for any line items that are over budget and fix them every month Jan - (of course) June or we are fined. Is that down to the object code? (1.5110.001.121)

Thanks,

Jolie

Jolie Kelly, CPA, CPFO
Chief Finance Officer
828-288-2240
Rutherford County Schools

382 West Main Street
Forest City, NC 28043

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828-288-2240

On Tue, Jan 23, 2024 at 8:30 AM Deborah Frisby

<debsdesigns62@gmail.com> wrote:

Good morning! Happy Tuesday. How are you today? Good luck with your senior staff meeting today. I can't wait to see your report that you have prepared. Reach out if you need anything. Have a great day.

Sent from my iPhone

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Re: [EXTERNAL] Happy Monday!

jkelly@rcsnc.org Jolie Kelly

To: debsdesigns62@gmail.com Deborah Frisby

Monday, January 22, 2024 at 10:28:58 AM Eastern Standard Time

Thanks

Jolie Kelly, CPFO
Chief Finance Officer
828-288-2240
Rutherford County Schools
382 West Main Street
Forest City, NC 28043

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828-288-2240

On Mon, Jan 22, 2024 at 10:28 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:

Thanks! You have a great day too!

Sent from my iPhone

On Jan 22, 2024, at 10:27 AM, Jolie Kelly <jkelly@rcsnc.org> wrote:

Sure will, thanks. I hope you have a great day!

Jolie Kelly, CPFO
Chief Finance Officer
828-288-2240
Rutherford County Schools
382 West Main Street
Forest City, NC 28043

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828-288-2240

On Mon, Jan 22, 2024 at 10:26 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:

What a great idea! You go girl !!!

Reach out if you need anything!

Sent from my iPhone

On Jan 22, 2024, at 10:24 AM, Jolie Kelly <jkelly@rcsnc.org> wrote:

Hey!

I think I'm good for right now. I am working on learning more about what we spend our local funds on. I'm taking the ZBB template and putting together an example from local funds to go over at a senior staff meeting tomorrow.

Thanks,

Jolie

Jolie Kelly, CPFO
Chief Finance Officer
828-288-2240
Rutherford County Schools
382 West Main Street
Forest City, NC 28043

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828-288-2240

On Mon, Jan 22, 2024 at 9:57 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:

Good morning! Hope you had a wonderful weekend. How are you today? Is there anything I may assist you with?

Sent from my iPhone

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Fwd: REaCH 055 Budget

jkelly@rcsnc.org Jolie Kelly

Friday, January 19, 2024 at 1:17:10 PM Eastern Standard Time

To: debsdesigns62@gmail.com Deborah Frisby

I sent you a meeting invite for 1 pm on Wednesday. Here is the email that he wants to discuss with us. I wanted you there to help me out.

Thanks,

Jolie

Jolie Kelly, CPFO
Chief Finance Officer
828-288-2240
Rutherford County Schools
382 West Main Street
Forest City, NC 28043

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828-288-2240

----- Forwarded message -----

From: **Jeremiah McCluney** <jsmcclun@rcsnc.org>
Date: Fri, Jan 19, 2024 at 10:54 AM
Subject: Re: REaCH 055 Budget
To: Jolie Kelly <jkelly@rcsnc.org>

Ms. Kelly,

Did you have a time this morning that would work? I am free until my meeting with teachers at 1:15.

On Thu, Jan 18, 2024 at 12:09 PM Jeremiah McCluney <jsmcclun@rcsnc.org> wrote:
My only meeting scheduled for tomorrow is at 1:15. Anytime in the morning works for me.

On Thu, Jan 18, 2024 at 11:44 AM Jolie Kelly <jkelly@rcsnc.org> wrote:

Because I am still very much in the learning mode I'd like to see if we can meet tomorrow with the NCASBO mentor as she may have some insights that will help us. What time would work best for you tomorrow?

Jolie

Jolie Kelly, CPFO
Chief Finance Officer
828-288-2240
Rutherford County Schools
382 West Main Street

Forest City, NC 28043

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828-288-2240

On Thu, Jan 18, 2024 at 10:43 AM Jeremiah McCluney <jsmcclun@rcsnc.org> wrote:
Ms. Kelly,

At your convenience I would like to discuss the 055 cooperative innovative high school funds. Below are some budget numbers I pulled from past years as a reference. Last year is not good references and we can discuss this at your convenience. I am needing an idea of what expenses I can pay for as we head toward the end of the school year and gear up for the busiest time of the year for REaCH. Please feel free to call me at your convenience.

2015-2016

1	5110	055 163 385 000 00	REG CURR - SUBSTITUTE PAY - STAFF DEV	\$80.00
1	5110	055 163 385 385 00	REG CURR - SUBSTITUTE PAY - STAFF DEV	\$1,389.00
1	5110	055 311 385 385 00	CONTRACTED SERVICES	\$88,508.69
1	5110	055 312 385 385 00	REG CURR - WORKSHOP EXP/ALLOWABLE TRAVEL	\$2,911.60
1	5110	055 333 385 385 00	REG CURR - FIELD TRIPS	\$5,691.34
1	5110	055 342 385 385 00	REG CURR - POSTAGE	\$294.00
1	5110	055 411 385 385 00	REG CURR - SUPPLIES AND MATERIALS	\$31,990.32
1	5110	055 418 385 385 00	REG CURR - COMPUTER SOFTWARE & SUPPLIES	\$1,550.08
1	5110	055 461 385 385 00	REG CURR - FURNITURE & EQUIPMENT - INV	\$1,386.50
1	5110	055 462 385 385 00	REG CURR - COMPUTER EQUIPMENT - INV	\$0.00

2016-2017

1	5110	055 163	385 000	00	REG CURR - SUBSTITUTE PA	\$80.00
1	5110	055 163	385 385	00	REG CURR - SUBSTITUTE PA	\$2,595.00
1	5110	055 311	385 385	00	CONTRACTED SERVICES	\$49,054.03
1	5110	055 312	385 385	00	REG CURR - WORKSHOP EX	\$17,833.28
1	5110	055 333	385 385	00	REG CURR - FIELD TRIPS	\$17,505.79
1	5110	055 342	385 385	00	REG CURR - POSTAGE	\$258.00
1	5110	055 411	385 385	00	REG CURR - SUPPLIES AND	\$65,876.38
1	5110	055 418	385 385	00	REG CURR - COMPUTER SOF	\$2,834.01
1	5110	055 461	385 385	00	REG CURR - FURNITURE & E	\$2,642.06
1	5110	055 462	385 385	00	REG CURR - COMPUTER EQU	\$9,207.65

2017-2018

1	5110	055 163	385 385	00	REG CURR - SUBSTITUTE PA	\$2,185.50
1	5110	055 311	385 385	00	CONTRACTED SERVICES	\$48,785.95
1	5110	055 312	385 385	00	REG CURR - WORKSHOP EX	\$412.45
1	5110	055 333	385 385	00	REG CURR - FIELD TRIPS	\$5,166.74
1	5110	055 342	385 385	00	REG CURR - POSTAGE	\$395.86
1	5110	055 411	385 385	00	REG CURR - SUPPLIES AND	\$6,307.62
1	5110	055 418	385 385	00	REG CURR - COMPUTER SOF	\$1,025.31

2018-2019

1	5110	055 163	385	000	00	REG CURR - SUBSTITUTE PA	\$40.00
1	5110	055 163	385	385	00	REG CURR - SUBSTITUTE PA	\$2,475.00
1	5110	055 311	385	385	00	CONTRACTED SERVICES	\$45,000.00
1	5110	055 312	385	385	00	REG CURR - WORKSHOP EX	\$586.81
1	5110	055 333	385	385	00	REG CURR - FIELD TRIPS	\$6,687.98
1	5110	055 342	385	385	00	REG CURR - POSTAGE	\$295.40
1	5110	055 411	385	385	00	REG CURR - SUPPLIES AND	\$15,073.51

2019-2020 (Covid Year – Limited field trips/etc

1	5110	055 163	385	385	00	REG CURR - SUBSTITUTE PA	\$1,366.00
1	5110	055 311	385	385	00	CONTRACTED SERVICES	\$45,000.00
1	5110	055 312	385	385	00	REG CURR - WORKSHOP EX	\$130.00
1	5110	055 333	385	385	00	REG CURR - FIELD TRIPS	\$2,000.00
1	5110	055 342	385	385	00	REG CURR - POSTAGE	\$297.00
1	5110	055 411	385	385	00	REG CURR - SUPPLIES AND	\$15,185.24
1	5110	055 418	385	385	00	REG CURR - COMPUTER SOF	\$2,389.50
1	5110	055 462	385	385	00	REG CURR - COMPUTER EQI	\$11,223.70

2020-2021 –Covid Year (No Trips/ETC)

1	5110	055 163	385	385	00	REG CURR - SUBSTITUTE PAY - STAFF DEV	\$766.50
1	5110	055 311	385	385	00	CONTRACTED SERVICES	\$53,160.00
1	5110	055 342	385	385	00	REG CURR - POSTAGE	\$1,397.00
1	5110	055 411	385	385	00	REG CURR - SUPPLIES AND MATERIALS	\$6,767.15

2021-2022

1	5110	055 311 385 385 00	CONTRACTED SERVICES	\$45,542.83
1	5110	055 312 385 385 00	REG CURR - WORKSHOP EXP/ALLOWABLE TRAVEL	\$122.00
1	5110	055 333 385 385 00	REG CURR - FIELD TRIPS	\$8,858.60
1	5110	055 342 385 385 00	REG CURR - POSTAGE	\$672.67
1	5110	055 411 385 385 00	REG CURR - SUPPLIES AND MATERIALS	\$24,897.35

2022-2023

1	5110	055 163 385 385 00	REG CURR - SUBSTITUTE PAY - STAFF DEV	\$688.80
1	5110	055 311 385 385 00	CONTRACTED SERVICES	\$45,000.00
1	5110	055 312 385 385 00	REG CURR - WORKSHOP EXP/ALLOWABLE TRAVEL	\$711.36
1	5110	055 333 385 385 00	REG CURR - FIELD TRIPS	\$18,921.50
1	5110	055 411 385 385 00	REG CURR - SUPPLIES AND MATERIALS	\$11,225.60
1	5110	055 462 385 385 00	REG CURR - COMPUTER EQUIPMENT - INV	\$2,080.08

--

Thank you,

Jeremiah McCluney
Rutherford Early College High School
828-395-4190
Fax 828-288-0285

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--

Thank you,

Jeremiah McCluney

Re: [EXTERNAL] Re: 8 items shared with you

jkelly@rcsnc.org Jolie Kelly

To: debsdesigns62@gmail.com Deborah Frisby

Friday, January 19, 2024 at 12:26:22 PM Eastern Standard Time

You're welcome.

Jolie Kelly, CPFO
Chief Finance Officer
828-288-2240
Rutherford County Schools
382 West Main Street
Forest City, NC 28043

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828-288-2240

On Fri, Jan 19, 2024 at 12:11 PM Deborah Frisby <debsdesigns62@gmail.com> wrote:
Thanks, Jolie.

On Fri, Jan 19, 2024 at 12:02 PM Jolie Kelly (via Google Drive) <drive-shares-noreply@google.com> wrote:

Jolie Kelly shared 8 items



Jolie Kelly (jkelly@rcsnc.org) has invited you to **view** the following items:

Here are all the ESSER/ZBB files for your review.

Thanks,






Jolie



ESSER Funding Cliff Toolkit.pdf



ESSER Asset Disposition Site.pdf

-  ESSER Funding Cliff Toolkit Webinar.pdf
-  ZBB Template.xlsx
-  Timeline Template for PSU Use
-  Crosswalk for Sustainability [OLR- NCDPI].docx.pdf
-  Zero based Budget Templates Document _ ESSER Cliff .pdf
-  NC Ed-Relevant Dashboards .pdf

If you don't want to receive files from this person, block the sender from Drive

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folders located in Google Drive with you.

Google Workspace

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[EXTERNAL] Re: SRO Award Documents

debsdesigns62@gmail.com Deborah Frisby

Friday, January 19, 2024 at 12:10:51 PM Eastern Standard Time

To: jkelly@rcsnc.org Jolie Kelly

Thanks Jolie. I will do some research on this and get back to you.

On Fri, Jan 19, 2024 at 12:01 PM Jolie Kelly <jkelly@rcsnc.org> wrote:

Jolie Kelly, CPFO
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382 West Main Street
Forest City, NC 28043

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Re: [EXTERNAL] Today

jkelly@rcsnc.org Jolie Kelly
To: debsdesigns62@gmail.com Deborah Frisby

Friday, January 19, 2024 at 8:09:31 AM Eastern Standard Time

Sounds good, talk to you then.

Jolie Kelly, CPFO
Chief Finance Officer
828-288-2240
Rutherford County Schools
382 West Main Street
Forest City, NC 28043

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828-288-2240

On Fri, Jan 19, 2024 at 8:03 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:
I will call at 10:00. Thanks!

Sent from my iPhone

On Jan 19, 2024, at 7:53 AM, Jolie Kelly <jkelly@rcsnc.org> wrote:

Hey!

Good morning. I think any time after 9:30 would work for me.

Thanks,

Jolie

Jolie Kelly, CPFO
Chief Finance Officer
828-288-2240
Rutherford County Schools
382 West Main Street
Forest City, NC 28043

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828-288-2240

On Fri, Jan 19, 2024 at 7:42 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:

Good morning! Due to weather conditions and icy roads, I will be working from home today. Let's schedule a conference call to catch up. What time would be convenient for me to call?

Thanks!

Sent from my iPhone

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Re: [EXTERNAL] Happy Thursday!

debsdesigns62@gmail.com Deborah Frisby
To: jkelly@rcsnc.org Jolie Kelly

Thursday, January 18, 2024 at 10:23:50 AM Eastern Standard Time

Okay...reach out if you need anything. Thanks.

On Thu, Jan 18, 2024 at 10:22 AM Jolie Kelly <jkelly@rcsnc.org> wrote:
It's going good. I'm in a meeting right now.

On Thu, Jan 18, 2024 at 10:21 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:
Hi Jolie,

Happy Thursday! How are you? How are things going there?

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Re: [EXTERNAL] Indirect Cost for SY 2023-2024

jkelly@rcsnc.org Jolie Kelly
To: **debsdesigns62@gmail.com Deborah Frisby**

Wednesday, January 17, 2024 at 12:18:48 PM Eastern Standard Time

ok, I'm doing the ethics training today seeing you are not here.

Jolie Kelly, CPFO
Chief Finance Officer
828-288-2240
Rutherford County Schools
382 West Main Street
Forest City, NC 28043

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828-288-2240

On Wed, Jan 17, 2024 at 12:17 PM Deborah Frisby <debsdesigns62@gmail.com> wrote:
Sure! How is everything else going?

Sent from my iPhone

On Jan 17, 2024, at 10:16 AM, Jolie Kelly <jkelly@rcsnc.org> wrote:

Maybe we can spend some time on this Friday.

Jolie Kelly, CPFO
Chief Finance Officer
828-288-2240
Rutherford County Schools
382 West Main Street
Forest City, NC 28043

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828-288-2240

----- Forwarded message -----
From: **Torra Walker** <Torra.Walker@dpi.nc.gov>
Date: Wed, Jan 17, 2024 at 9:56 AM

Subject: [EXTERNAL] Indirect Cost for SY 2023-2024

To: jkelly@rcsnc.org <jkelly@rcsnc.org>

TO: Dr. David Sutton, Superintendent
Mrs. Jolie Kelly, Finance Officer
Sherry Suttle, School Nutrition Director

FROM: Janet Johnson, Assistant Director
Office of School Nutrition

DATE: January 10, 2024

INDIRECT COST IN THE SCHOOL NUTRITION PROGRAM FOR SY 2023-2024

Pursuant to General Statute 115C-450 and in accordance with the 2023-2024 agreement between the Local Education Agency (LEA) and the North Carolina Department of Public Instruction/State Board of Education (NCDPI/SBE) to administer the Federally assisted School Nutrition Programs, the Office of School Nutrition is responsible for determining whether each LEA may assess indirect cost to the School Nutrition Program for the current school year. Consistent with the statute, the number of month's operating balance for each LEA's School Nutrition Program has been determined based on the June 30, 2023 financial report (FC1-A) submitted via the School Nutrition Technology System.

Based on data obtained from the district's school nutrition financial report (FC1-A), the number of month's operating balance for **Rutherford County Schools** has been determined to be **2,1900**. The LEA's School Nutrition Program has met the requirement of having at least two-month's operating balance and, as a result, the local Board of Education (BOE) may assess indirect cost to the Program during the 2023-2024 School Year in accordance with established indirect cost procedures at 8%. The solvency of each LEA's School Nutrition Program will be examined annually using the LEA's final audited financial statement. Should the month's operating balance change, the local BOE may not be able to assess indirect cost in future years.

The LEA's agreement to administer the School Nutrition Program indicates the district will assess indirect cost in a manner that promotes the overall financial solvency of the program. Before making the decision to assess indirect cost, please have a conversation with the LEA's School

Nutrition Director to discuss the program's overall sustainability based on several administrative and operational factors. In making the decision to assess indirect cost, it is important to examine the status of the non-profit School Nutrition account and discuss any new and emerging needs related to increasing and/or sustaining high student participation. Although it is a non-profit operation, federal regulations (7 CFR 210.14(b)) allow the maintenance of three months' operating balance to enable the School Nutrition Program to plan and budget for short and long-term expenses that may impact future sustainability, including but not limited to commercial equipment (replacement and repair), specialized personnel, increased food quality, and other investments that support the provision of nutritious, appealing, affordable meals to students.

In the event the LEA makes the decision to assess indirect cost, the Superintendent or designee must notify the Office of School Nutrition, in writing, of their intent to assess indirect cost. The communication,

preferably by letter on LEA letterhead, should be addressed to me at the e-mail referenced below and should include the expected percentage that will be charged to the program (100%, 50% or a set dollar amount) and frequency (monthly, quarterly, etc.) of the payment.

Should you have questions regarding this communication, please contact Janet Johnson, Assistant Director, Office of School Nutrition Division at (984) 236-2912 or via e-mail at janet.williamsjohnson@dpi.nc.gov. Please also forward the letter of intent to me at this e-mail address should the decision be made to assess indirect cost for the program year referenced in this letter.

Thank you for your continued support of the School Nutrition Programs.

JJ/tw

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[EXTERNAL] Check In

debsdesigns62@gmail.com Deborah Frisby

Wednesday, January 17, 2024 at 10:12:19 AM Eastern Standard Time

To: jkelly@rcsnc.org Jolie Kelly

Hi Jolie,

Happy Wednesday! How are you? How are things going there?

jkelly@rcsnc.org Jolie Kelly

Wednesday, January 17, 2024 at 10:15:09 AM Eastern Standard Time

To: debsdesigns62@gmail.com Deborah Frisby

Ok I guess. I hope everything is ok at your place. I'm going to send you an email we got so you can go over it with me on Friday.

Good luck with your appointments,

Jolie

Jolie Kelly, CPFO
Chief Finance Officer
828-288-2240
Rutherford County Schools
382 West Main Street
Forest City, NC 28043

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828-288-2240

On Wed, Jan 17, 2024 at 10:12 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:

Hi Jolie,

Happy Wednesday! How are you? How are things going there?

Re: [EXTERNAL] Checking In

jkelly@rcsnc.org Jolie Kelly

To: debsdesigns62@gmail.com Deborah Frisby

Tuesday, January 16, 2024 at 3:07:02 PM Eastern Standard Time

I completely understand.

Jolie Kelly, CPFO
Chief Finance Officer
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382 West Main Street
Forest City, NC 28043

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On Tue, Jan 16, 2024 at 3:06 PM Deborah Frisby <debsdesigns62@gmail.com> wrote:

Okay, sounds good. Thank you. Sorry for the short notice but all this just transpired over the weekend and today.

On Tue, Jan 16, 2024 at 3:04 PM Jolie Kelly <jkelly@rcsnc.org> wrote:

Thank you for that information!

I have also drafted the allotment entry for #27 for your review on Friday.

Good luck with all your appointments.

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Forest City, NC 28043

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On Tue, Jan 16, 2024 at 3:01 PM Deborah Frisby <debsdesigns62@gmail.com> wrote:

Hi Jolie,

I'm glad everything is okay.

Section 7 of HB 259 addresses the second year of the biennium budget. There are 2024-25 salary schedules for teachers, principals, and central office administration posted in this document. Here is the link.

<https://www.dpi.nc.gov/session-law-2023-134h259v7pdf/download?attachment?attachment>

For 2024-25, the retirement matching rate is slated to go down to 24.04% Health insurance is slated to go up to \$8095 per year per eligible employee (7% increase for current year) Non-certified pay increases are proposed at 3%.

On another note, I will not be coming to Rutherford tomorrow. I have two appointments and my mom has one appointment that I need to take her to. I plan on being there all day Friday

Thanks for your flexibility. I am working on the budget amendment for PRC 181 and will have that ready for review on Friday. .

Let me know if you need anything or if I can help you with anything.

On Tue, Jan 16, 2024 at 2:09 PM Jolie Kelly <jkelly@rcsnc.org> wrote:

Good afternoon,

I looked at my phone earlier and I did not see any text. I just got back from the bank and it's there...weird.

I think everything is ok.

Taking a look at salary schedules. Dr. Ash and I want to update the ones we have control over, as neither one of us likes the prior format. Do you happen to have any info on what the percentage increases are for this second half of the biennium? I tried googling it without any success. In reference to my salary, Dr. Sutton said that it is scheduled to be a 3% COLA, but I could not easily find anything online.

Thanks for checking in,

Jolie

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828-288-2240
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828-288-2240

On Tue, Jan 16, 2024 at 1:48 PM Deborah Frisby <debsdesigns62@gmail.com> wrote:

Hi Jolie,

I hope you're doing well. Just checking in to see if all is good. I sent you a text this morning but didn't hear back from you.

Is there anything I may help with? Thanks.

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[EXTERNAL] Journal Entry for PRC 169 and PRC 170- GEER Fund

debsdesigns62@gmail.com Deborah Frisby

Friday, January 12, 2024 at 12:46:52 PM Eastern Standard Time

To: jkelly@rcsnc.org Jolie Kelly

Hi Jolie,

Based on the document shared with me in December and based on the Chart of Accounts for these two PRCs, I have identified eligible expenditures for reimbursement.

Here is the journal entry for PRC 169 GEER Funds:

3.8100.169.395	Debit	\$36,025
2.5830.007.131	Credit	\$27,155
2.5830.007.211	Credit	\$ 2,077
2.5830.007.221	Credit	\$ 6,793

Here is the journal entry for PRC 170 GEER Funds:

3.8100.170.395	Debit	\$40,000
3.5353.181.198	Credit	\$30,150
3.5353.181.211	Credit	\$ 2,306
3.5353.181.221	Credit	\$ 7,544

I have attached supporting documentation to support this. Please retain this information. NCDPI will be requesting this documentation at some point.

All that is required at this point is to enter the journal entries.

Let me know if you have any questions. Thanks so much!

Attachments:**COVID Related Refund Processing.121323_jb.pdf** 143k**GEER Expenditures 1.12.2024.xlsx** 73k

Re: [EXTERNAL] PRC 083 for CTE - spreadsheet request

jkelly@rcsnc.org Jolie Kelly
To: aownbey@rcsnc.org Angie Ownbey

Friday, January 12, 2024 at 9:18:17 AM Eastern Standard Time

Thank you

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Chief Finance Officer
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Forest City, NC 28043

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On Fri, Jan 12, 2024 at 9:08 AM Angie Ownbey <aownbey@rcsnc.org> wrote:

This is our Cook Spreadsheet company. Paige is the one who sends out the install emails, update users and access to only the spreadsheets.

On Fri, Jan 12, 2024 at 8:48 AM Jolie Kelly <jkelly@rcsnc.org> wrote:

Thank you Angie. Can you please explain to me how this company/individual is associated with setting up our GL codes?

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On Fri, Jan 12, 2024 at 8:09 AM Angie Ownbey <aownbey@rcsnc.org> wrote:

Yes, Please add. Do you need me to send the spreadsheet?
Thanks

On Thu, Jan 11, 2024 at 2:32 PM Paige Reeder <paige@transact.com> wrote:

Jolie and Angie,

I've gotten numerous emails from other LEAs to add this new PRC for CTE.

Do you need this added? Please advise.

Paige Reeder

This message (including any attachments) may contain confidential and privileged information. If you are not the intended recipient, please notify the sender and delete all copies of the original message without using or disclosing.

--
Angie Ownbey
Assistant Finance Officer
Rutherford County Schools
382 West Main St
Forest City, NC 28043
828-288-2246 phone
828-288-2490 fax
aownbey@rcsnc.org

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--
Angie Ownbey

Assistant Finance Officer
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Attachments:

image656248.png 13k
image813147.png 543
image161169.png 432
image157182.png 438
image104763.png 731

Re: [EXTERNAL] Re: BOE Member Request

jkelly@rcsnc.org Jolie Kelly
To: debsdesigns62@gmail.com Deborah Frisby

Thursday, January 11, 2024 at 4:01:18 PM Eastern Standard Time

Ok, thanks.

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On Thu, Jan 11, 2024 at 2:45 PM Deborah Frisby <debsdesigns62@gmail.com> wrote:

Good afternoon! Thanks for the heads up. Let's look at this tomorrow. I may have some insight on how we can retrieve this data. Thanks.

See you tomorrow.

On Thu, Jan 11, 2024 at 2:35 PM Jolie Kelly <jkelly@rcsnc.org> wrote:

Good afternoon,

One of the board members has requested a side-by-side comparison of the FTEs by position and location for the fall of 2019 and the fall of 2023. Dr. Ash is going to look at this from the HR Linq side. If she cannot get that information, Dr. Sutton has asked if this data can be gotten from our side.

We have started some training for the Linq HR module, so Dr. Ash will reach out to the trainer to see if they know a "magic" way to get the historical data. He was a prior CFO (can't remember the name or the county).

Looking forward to seeing you tomorrow.

Jolie

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Chief Finance Officer
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Forest City, NC 28043

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Re: [EXTERNAL] Checking In

jkelly@rcsnc.org Jolie Kelly
To: debsdesigns62@gmail.com Deborah Frisby

Thursday, January 11, 2024 at 10:18:20 AM Eastern Standard Time

I think I'm good for right now.

Thanks,

Jolie

Jolie Kelly, CPFO
Chief Finance Officer
828-288-2240
Rutherford County Schools
382 West Main Street
Forest City, NC 28043

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828-288-2240

On Thu, Jan 11, 2024 at 10:14 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:
Okay we can address that tomorrow. Is there anything I may help you with?

On Thu, Jan 11, 2024 at 10:02 AM Jolie Kelly <jkelly@rcsnc.org> wrote:
It's going good.

I am working on the question of disposal of ESSER purchased assets. Working on the virtual enrollment question from the BOE (checking with Dr. Sutton about how he wants us to communicate with the board). Next I'm working on the new allotments that came out, as I have not had a chance to look at them yet.

Tomorrow I want to talk about PTO and separation between them and RCS, what role I should play in any PTO financial matters, and PTO using RCS purchase card and then reimbursing us.

Thanks,

Jolie

Jolie Kelly, CPFO
Chief Finance Officer
828-288-2240
Rutherford County Schools
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828-288-2240

On Thu, Jan 11, 2024 at 9:57 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:

Hi Jolie,

Happy Thursday! How are you? How are things going there?

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Follow up from BOE Meeting

jkelly@rcsnc.org Jolie Kelly

Wednesday, January 10, 2024 at 8:33:54 AM Eastern Standard Time

To: debsdesigns62@gmail.com Deborah Frisby

Good morning,

Again, thank you for your help. I am so glad you got home safe last night.

I believe we have 3 action items from the workshop:

1. # of virtual students for Vice Chair Ficklin. I have asked John to look this up.
2. Comparison stats from Stanley County Schools.
3. SRO spending, state, local and other sources. Can you pull this together for me or show me how to do this?

Here is the Standly ESSER graphic showing they have been steadily reducing their staff as student enrollment has increased.

image.png

What would be the best way to find out the counties that are most like RCS and to get their FTE stats?

Thanks,

Jolie

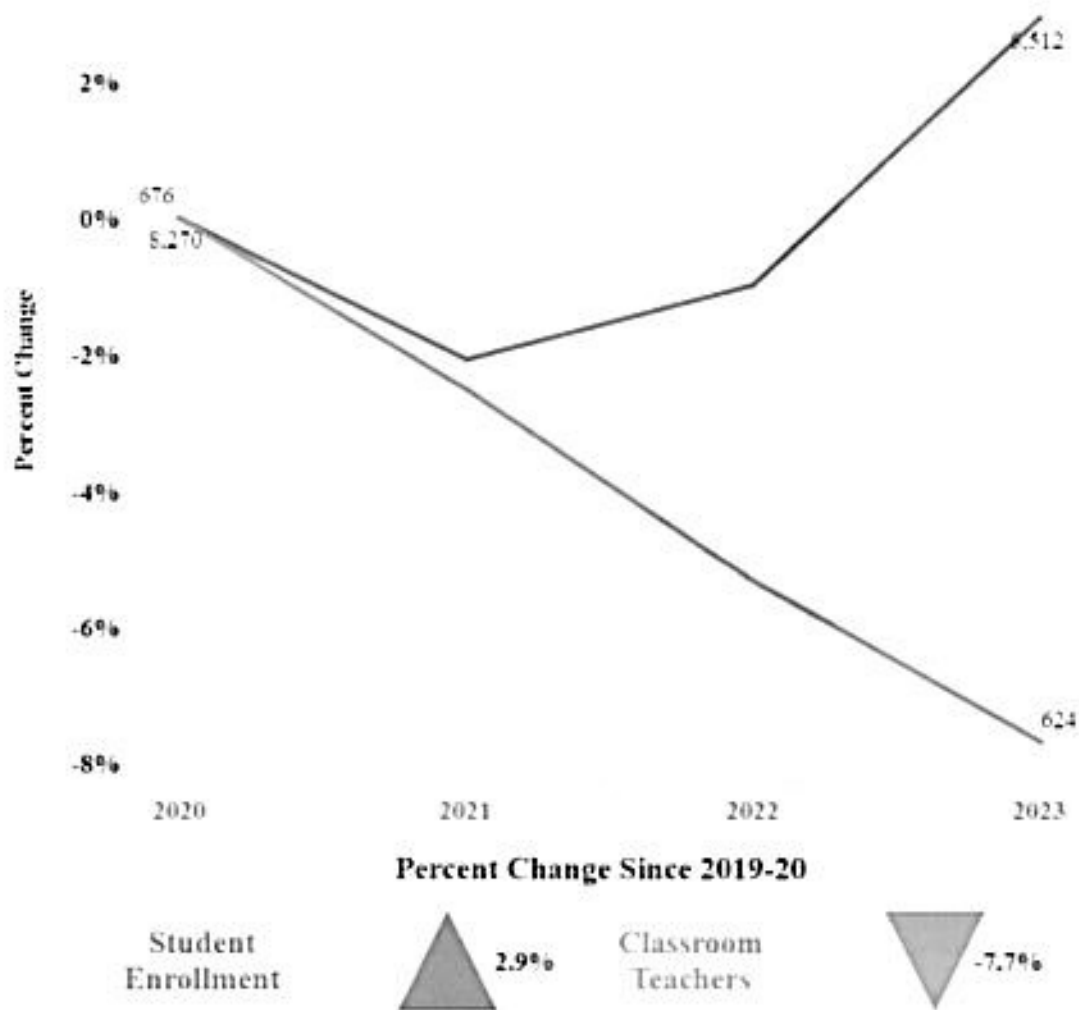
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828-288-2240

Attachments:

image.png 64k

Student Enrollment and Teacher Staffing Trends



[EXTERNAL] For flash drive

debsdesigns62@gmail.com Deborah Frisby

Tuesday, January 9, 2024 at 4:42:18 PM Eastern Standard Time

To: jkelly@rcsnc.org Jolie Kelly

Attached

Attachments:

2023-2024 Local Current Expense Budget Report Deeper Dive 1.9.2023.xlsx 59k

ESSER III Doc

jkelly@rcsnc.org Jolie Kelly
To: debsdesigns62@gmail.com Deborah Frisby

Tuesday, January 9, 2024 at 3:22:10 PM Eastern Standard Time

Jolie Kelly, CPFO
Chief Finance Officer
828-288-2240
Rutherford County Schools
382 West Main Street
Forest City, NC 28043

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828-288-2240

Attachments:

ESSER Spending Profile 1-4-2024.pdf 468k

Re: [EXTERNAL] Checking In

debsdesigns62@gmail.com Deborah Frisby**Monday, January 8, 2024 at 2:18:31 PM Eastern Standard Time****To: jkelly@rcsnc.org Jolie Kelly**

Hi Jolie,

How's your afternoon going? Any update from Dr. Sutton on the information for tomorrow's Board meeting? Thanks!

On Mon, Jan 8, 2024 at 10:55 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:

Okay I will not bother you. Reach out if you need anything. I'll touch base after lunch.

On Mon, Jan 8, 2024 at 10:54 AM Jolie Kelly <jkelly@rcsnc.org> wrote:

All is good. A few bumps during the Head Start fiscal review this morning. I'm in a Linq HR module training session right now.

Jolie Kelly, CPFO
Chief Finance Officer
828-288-2240
Rutherford County Schools
382 West Main Street
Forest City, NC 28043

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828-288-2240

On Mon, Jan 8, 2024 at 10:52 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:

Hi Jolie,

I hope you had a wonderful and restful weekend. How are you ? How are things going there?

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[EXTERNAL] NCASBO Conference

debsdesigns62@gmail.com Deborah Frisby**Friday, January 5, 2024 at 3:36:19 PM Eastern Standard Time**

To: dsutton@rcsnc.org David Sutton

Good afternoon Dr. Sutton. I hope you are having a great day!

I was curious if any of the Finance Team will be attending the NCASBO conference February 5th -8th?

There are several sessions being offered that are impactful for the Finance Department.

One session offered will discuss the changes coming down on the new budget code requirements. It is expected that this new requirement will go into effect 7.1.2024. This will be a huge change for the Finance Department! The more we can learn ahead of time, the greater the success in implementation.

Another session offered is called Position Control-How to Implement Staffing Formulas. -a direction we want to pursue for RCS.

There will also be a session on the changes in the vendor for health insurance. Again, the more we can learn ahead of time, the better!

What are your thoughts? Thank you in advance for your consideration.

Have a great weekend!

[EXTERNAL] ESSER III Summary

debsdesigns62@gmail.com Deborah Frisby

Friday, January 5, 2024 at 2:10:10 PM Eastern Standard Time

To: jkelly@rcsnc.org Jolie Kelly

Hi Jolie,

This document is attached. Let me know your thoughts.

Thanks!

Attachments:

ESSER III Summary 1.5.2024.docx 13k

Board Update | Friday, January 5, 2024

dsutton@rcsnc.org David Sutton

Friday, January 5, 2024 at 11:32:18 AM Eastern Standard Time

To: pscott@rcsnc.org Paul Scott, pmorrow@rcsnc.org Phillip Morrow, aprilm@rcsnc.org April Mayse, tshort@rcsnc.org Tracy Short, angelk@rcsnc.org Angel King, bnanney@rcsnc.org Brandi Nanney, rficklin@rcsnc.org Rick Ficklin

Dear Board Members,

I hope you all enjoyed the recent holidays with family and friends, and that the new year is off to a good start for each of you. Our students returned to begin the second semester of the school year yesterday, and it's good to see our classrooms and schools back in full swing. As the weekend approaches -- perhaps with a hint of wintry weather in the mix -- I have included several informational items in this week's update, including a preview of Tuesday's Board meeting. As always, please feel free to call me at your convenience if you need any additional information or have any related questions I can help to answer.

Board Meeting | Tuesday, January 9, 2024

Given the recent holidays, I am including a preview of Tuesday's Board meeting in lieu of individual meetings. Mr. Morrow and I reviewed the draft agenda by telephone yesterday morning. I have attached a copy for your convenience and want to provide some additional detail around several of its features.

Work Session

We will hold a two-hour work session prior to the business meeting on Tuesday evening. The work session will be held in the Teacher Training Area (room 200, upstairs) from 5:00 PM until 7:00 PM, and it will focus exclusively on school budget and finance as we enter the FY 2024-2025 budget planning season.

I have asked chief financial officer Jolie Kelly, along with Deborah Frisby, her mentor from HIL Consultants provided by NCASBO, to cover a wide range of related topics, including:

1. An overview of the strategy and construction of the budget for the current fiscal year;
2. A detailed look at expenses within the local current expense fund;
3. A preview of the FY 2023-2024 expenditure report Mrs. Kelly will formally present during the business meeting (see my related footnote below);
4. A detailed look at expenses currently supported by our remaining ESSER III funds to offset revenue shortfalls from other sources; and
5. An early look at anticipated needs and considerations for the FY 2024-2025 budget.

Toward that end, they have prepared several excellent documents that I believe you will find helpful -- and ones that more fully and precisely answer lingering questions several of you have raised about the organization of the local current expense budget and ESSER spending.

I also want to offer a footnote around #3, above. In previous years, our former finance officer provided an expenditure report to the Board every other month, and that report appeared on the Board's consent agenda without any related discussion during the meeting. I want to change that reporting in two ways. First, I want to increase its frequency so that the Board receives an expenditure report every month. Second, I want to remove the report from the consent agenda and entertain it as a business item so that it is properly presented and explained, and so that Board members have regular, recurring opportunities to ask clarifying or other questions about its contents. I believe the increased attention will be beneficial, and I also believe the new approach will improve transparency for attendees and others who may watch Board meetings online. Given those changes, and since this is the first meeting where they will occur, I have asked Mrs. Kelly to offer you a preview of the report during the work session before she formally presents it during the business meeting.

Dinner will be available during the work session.

Business Meeting

We will begin the meeting with several special recognitions. Shortly before the recent holiday break, I received a collection of certificates from NCDPI and the State Board of Education recognizing many of our schools for their performance during the 2022-2023 school year -- 12 schools based on growth results, and 2 schools based on the cohort graduation rate. In addition to recognizing the principals of those schools, we will also recognize Chase Middle School teacher Michael Henderson, who recently earned certification by the National Board for Professional Teaching Standards.

In addition to several recurring items, the consent agenda also includes the FY 2024-2024 Budget Development Timeline. Policy 8100 ("Budget Planning and Adoption") provides, "By January 31 of each year, the superintendent shall submit to the board a calendar outlining the steps to be followed and the target dates for development of the budget for the next fiscal year." The timeline you will receive in your Board packet provides a high-level overview of key dates and related activities. For the most part, those activities correspond to regular Board meeting dates, with three exceptions: an additional budget work session, as needed, on Tuesday, March 19, 2024; a joint meeting with the board of commissioners on a date to be determined in April, 2024; and a specially-called business meeting to close out the current fiscal year on Thursday, June 27, 2024.

Under "Strategic Plan Focus," Margaret McKinney, Tasaan Dover, and Sarah Hopper will provide an update around local GEAR UP activities -- short for "Gaining Early Awareness and Readiness for Undergraduate Programs," a federal grant program administered by the U.S. Department of Education and focused on enhancing college readiness at high-poverty middle and high schools across the nation. Our school system has participated in GEAR UP through several seven-year grant cycles. During the current grant cycle, we are partnered with Winston Salem State University, which provides programming support and serves as the grant's fiscal agent. The presenters will discuss the project, key features and activities, and intended outcomes, as well as answer any related questions you may have. No Board action is required.

Under "Business Items," please anticipate four presentations, with three being eligible for Board action:

1. I will present several school calendar models for the 2024-2025 school year -- one for Rutherford County Schools, one for Forest City-Dunbar Elementary School, and one for Rutherford Early College High School (REaCH) -- for the Board's review. Those models will illustrate the organization and arrangement of school calendars for the upcoming school year should the Board wish to maintain its current position on the start date. You will receive copies in your Board packet so that you can spend some time reviewing them prior to the meeting. Following that presentation, the Board may, at its discretion, (1) adopt calendars, (2) defer calendar adoption until a future meeting, or (3) direct the administration to develop additional calendar models for review during a future meeting.
2. Chief operating officer Brad Teague will present our recommendation for a vendor to provide Furniture, Fixtures, and Equipment ("FF&E") purchasing and design services at the RCS Operations Center, currently under construction. You will receive a corresponding memorandum in your Board packet. In summary, we have determined that Young Office submitted the most responsive, most responsible proposal in response to the Request for Qualifications we published on November 6, 2023, and we are recommending the Board's approval to contract with them for those furnishing services at an estimated cost of \$1M within the overall construction budget of \$16.1M.
3. Chief financial officer Jolie Kelly will present the first budget amendment of the current fiscal year since the Board adopted its budget resolution in November. Your Board packet will include two related documents -- (1) a memorandum summarizing and explaining the amendment, and (2) a revised budget resolution in the same format you saw in November, but now incorporating an additional \$1.6M in state and federal allotments. While you have received budget amendments as part of the consent agenda in prior years, I favor entertaining them as business items for the same reasons I described with expenditure reports. Mrs. Kelly will discuss the proposed amendment and answer any questions you may have before taking action on them.
4. Finally, as I described earlier, Mrs. Kelly will present the first monthly installment of the FY 2023-2024 Expenditure Report, discussing some key observations and answering any questions you may have. This presentation is purely informational, and no Board action is required.

Security Alarm Monitoring

In several updates prior to the recent holiday break, I detailed unexpected plans for Rutherford County 911 Communications to discontinue its monitoring of our school system's fire, security, and panic button alarms, effective Sunday, December 31, 2023.

By way of an update, 911 Communications still plans to discontinue that monitoring, but it has adjusted the effective date from Sunday, December 31, 2023, to Sunday, June 30, 2024, so that we have more time to identify a new provider for those monitoring services. In an email earlier this week, director Scott Schiefelbein offered this update:

I was just discussing this with Steve Garrison. We have agreed that we will continue to monitor the Rutherford County School alarms until June 30th 2024 to allow ample time for you to find a vendor to take over the process.

With this, we will be sending a bill out for the six months based on the reduced annual rate of \$180 for just the \$90 per facility. There are 25 facilities that will be billed for a total of \$2250.

We will be moving away from any alarm monitoring by June 30th for any properties. This is due to several reasons including NC G.S 74D, equipment costs, and concerns over liabilities placed on Rutherford County, along with other determinations.

We thank you for working with us in our transition and know that since January 1st our staff has continued monitoring the school alarms without any disruption.

If you have any other questions feel free to let me know.

I will share more information with you as we work to identify a new service provider and related costs for the upcoming fiscal year.

Recent Social Media Posts

Yesterday afternoon, Mrs. Mayse asked me for some information related to two social media messages recently posted by school board candidate Thomas Crawford -- one reading "\$727.20 catering fee for a RC school board meeting No wonder our teachers are buying supplies out of pocket" and another citing total expenditures for account code 2.6940.801.361, "Membership Dues" and captioned "Rutherford County Schools sure has a lot of memberships." I'm sharing with all of you the information I shared with her so that you all have equal access to those details.

Mr. Crawford has recently submitted multiple public records requests for details of financial transactions over several fiscal years. One responsive record from the 2021-2022 fiscal year indicates a payment of \$727.20 to Chartwells / RCS Child Nutrition for "Catering for Board of Education Meetings." However, that is NOT the cost of catering for a single meeting. It appears to be a lump sum payment for catering at five different board of education meetings from September, 2021, through January, 2022. In all, six payments were made during that fiscal year, ranging from \$125.10 for a single meeting to \$727.20 for five meetings, representing a total annual cost of \$1,843.10 for all catering services at all board of education meetings.

On the other post regarding "Membership Dues," those costs include payments to the North Carolina School Boards Association (\$22,070); the North Carolina Association of School Administrators (\$6,700); the Western Region Education Service Alliance (\$22,000); the Association for Supervision and Curriculum Development (\$3,673.17); and the Rutherford County Chamber of Commerce (\$1,500.00) during the 2021-2022 fiscal year.

Equity & Excellence Promising Practices 2.0 District Spotlight

I am pleased to let you know that our school system's Academically/Intellectually Gifted ("AIG") program will once again be highlighted by the Office of Advanced Learning and Gifted Education within the Division of Standards, Accountability, and Research at the North Carolina Department of Public Instruction. That group has been working on the next edition of its "Equity and Excellence Critical Action Promising Practices" guide for all North Carolina public schools to use as a resource to inform AIG programming across the state. The publication collects and highlights

"promising practices" that align with six factors critical to achieving equity and excellence in gifted education. The upcoming release will include the following "promising practice" from our local AIG program:

- Conducts a broad sweep of the general population 3-12 during each school year to determine a pool of students for AIG screening. Evidence is only needed from at least one indicator to enter the pool. Indicators vary at the different grade level spans, but all include student, parent, or teacher nominations.

The Office will also highlight those "promising practices" during its upcoming Winter Institute on Thursday, January 11, 2024, and I am happy that our school system's AIG program will again be recognized as a leader in our state.

Atrium Health | School-Based Telehealth Services

During the June 6 Board meeting, you heard a presentation about school-based telehealth services from Mr. Sam McGinnis and Dr. Trey Williams with Atrium Health. Atrium has successfully installed a very effective and sustainable telehealth model in well over 50 schools and, during that presentation, described its structure, features, and benefits to students and school employees.

In my December 8 update, I noted that Atrium Health has secured the startup funding necessary to launch the service in Rutherford County Schools in early 2024. That startup will begin on Monday of the coming week, and I am including target start dates for each of our elementary schools for your information:

School	Target Start Date
Forest City-Dunbar Elementary School	Monday, January 8
Forrest W. Hunt Elementary School	Monday, January 8
Harris Elementary School	Tuesday, January 16
Ellenboro Elementary School	Tuesday, January 16
Rutherfordton Elementary School	Monday, January 22
Mt. Vernon-Ruth Elementary School	Monday, January 22
Cliffside Elementary School	Monday, January 29
Sunshine Elementary School	Monday, January 29
Spindale Elementary School	Monday, February 5
Pinnacle Elementary School	Monday, February 5
Carver Center	TBD

Ultimately, expansion will include middle and high schools, but those additions will come along in a subsequent phase yet to be determined.

Thanks, and have a good weekend.

David M. Sutton, Ed.D.
 Superintendent
 Rutherford County Schools
 382 West Main Street | Forest City, NC 28043
 Phone 828.288.2200 | Fax 828.288.2490

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Attachments:

__Agenda 2024-01-09.pdf 134k

2024 Summer School

jkelly@rcsnc.org Jolie Kelly

Friday, January 5, 2024 at 9:57:52 AM Eastern Standard Time

To: reneec@rcsnc.org Renee Collins, debsdesigns62@gmail.com Deborah Frisby

Good morning,

We are working on the plan for final ESSER spending and need to know if the district is planning on having a summer school this year 2024 to mitigate learning loss.

Thanks,

Jolie

Jolie Kelly, CPFO
Chief Finance Officer
828-288-2240
Rutherford County Schools
382 West Main Street
Forest City, NC 28043

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Exception and Months Used reports

aownbey@rcsnc.org Angie Ownbey

Friday, January 5, 2024 at 9:43:16 AM Eastern Standard Time

To: jkelly@rcsnc.org Jolie Kelly, debsdesigns62@gmail.com Deborah Frisby

December has been posted for us. I have attached the requested reports.

--

Angie Ownbey
Assistant Finance Officer
Rutherford County Schools
382 West Main St
Forest City, NC 28043
828-288-2246 phone
828-288-2490 fax
aownbey@rcsnc.org

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Attachments:

exception list as Dec 2023.xlsx 18k

Allotment Report - Months Allocated vs used period 7.pdf 259k

[EXTERNAL] Re: Workshop Meeting

debsdesigns62@gmail.com Deborah Frisby
To: jkelly@rcsnc.org Jolie Kelly

Thursday, January 4, 2024 at 1:43:30 PM Eastern Standard Time

Thanks, Jolie. We will tackle this first thing in the morning. I will have to step out at 10:00 am to take a conference call but it should be brief. Reach out if you need anything.

On Thu, Jan 4, 2024 at 1:00 PM Jolie Kelly <jkelly@rcsnc.org> wrote:

FYI, for tomorrow - Here is the information that Dr. Sutton wants to make sure we have available related to the ESSER funding. Once we have all our documents ready I will make the paper copies that he mentions.

Also, in our discussion of the 24-25 budget we need to remember that Dr. Sutton wants to start budgeting at the operating department level. So that Finance and HR and Maintenance, IT etc. have operating budgets. Then the staff over these areas can be taught to use the Cook spreadsheets to review their budget and be more responsible for the decisions they are making.

Jolie Kelly, CPFO
Chief Finance Officer
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----- Forwarded message -----

From: **David Sutton** <dsutton@rcsnc.org>
Date: Thu, Jan 4, 2024 at 11:32 AM
Subject: Re: Workshop Meeting
To: Jolie Kelly <jkelly@rcsnc.org>

Thank you. To answer your question first, we customarily provide only printed copies of handouts during work sessions. Fifteen copies (7 Board members, 1 superintendent, 5 senior staff members, 1 Board assistant, 1 Board attorney) should do the trick.

I like the ESSER spending profile and would certainly include it, but can we also provide some more basic details in response to questions they have raised? To wit, how much ESSER funding was still available for our use during the current fiscal year? Exactly how are we using it to offset the revenue shortfall from other sources? Much like the local current expense fund, I believe they will want to see some specific detailing -- fluid though it may still be -- of actual ESSER expenditures during the current fiscal year to better understand the specific costs we're supporting there, especially given the time-limited nature of that funding. Glad to chat at your convenience this afternoon if some related conversation would be helpful in any way.

David M. Sutton, Ed.D.
Superintendent
Rutherford County Schools

382 West Main Street | Forest City, NC 28043
Phone 828.288.2200 | Fax 828.288.2490

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On Thu, Jan 4, 2024 at 11:07 AM Jolie Kelly <jkelly@rcsnc.org> wrote:

For the workshop meeting are the documents provided/projected digitally, or do we need printouts for everyone?

Attached is what we are planning to review with them plus the expenditure report.

Jolie Kelly, CPFO
Chief Finance Officer
828-288-2240
Rutherford County Schools
382 West Main Street
Forest City, NC 28043

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Re: [EXTERNAL] Re: BOE Meeting Package and Presentation Narrative

jkelly@rcsnc.org Jolie Kelly
To: debsdesigns62@gmail.com Deborah Frisby

Thursday, January 4, 2024 at 11:20:05 AM Eastern Standard Time

Good catch. Thanks.

Jolie Kelly, CPFO
Chief Finance Officer
828-288-2240
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382 West Main Street
Forest City, NC 28043

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On Thu, Jan 4, 2024 at 11:18 AM Deborah Frisby <debsdesigns62@gmail.com> wrote:
Hi Jolie,

This looks great. My only suggestion is to change the word unanticipated to additional in the narrative document. This matches the verbiage used in your memo outlining the budget amendment. Just a suggestion. 😊

Thanks!

On Thu, Jan 4, 2024 at 11:02 AM Jolie Kelly <jkelly@rcsnc.org> wrote:
I asked Dr. Sutton to make sure that budget amendment was first on the agenda so they will have approved it before it is presented in the expenditure report.

Let me know if my "words" are appropriate for the Board.

Thanks for all your help yesterday!!

Jolie Kelly, CPFO
Chief Finance Officer
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Rutherford County Schools
382 West Main Street
Forest City, NC 28043

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