

MANAGEMENT AND INVESTMENT OF FUNDS

This investment policy is adopted in accordance with the provisions of applicable law by the board of education. This policy sets forth the investment policy for the management of the public funds of the district. The policy is designed to ensure prudent management of public funds, the availability of funds when needed, and reasonable investment returns.

Investment Authority

The district treasurer is required by the board of education to invest district monies in the custody of the treasurer in those investments permitted by law. The treasurer shall, to the extent practicable, use competitive bids when purchasing direct obligations of the United States Government or other obligations of the United States Government, its agencies, or instrumentalities.

The district treasurer shall limit investments to:

1. Direct obligations of the United States Government to the payment of which the full faith and credit of the Government of the United States is pledged; provided the district treasurer, after completion of an investment education program in compliance with applicable law, may invest funds in the investment account in other obligations of the United States Government, its agencies or instrumentalities;
2. Obligations to the payment of which the full faith and credit of this state is pledged;
3. Certificates of deposits of banks when such certificates of deposits are secured by acceptable collateral as in the deposit of other public monies;
4. Savings accounts or savings certificates of savings and loan associations to the extent that such accounts or certificates are fully insured by the Federal Savings and Loan Insurance Corporation;
5. Repurchase agreements that have underlying collateral consisting of those items specified in paragraphs 1 and 2 above including obligations of the United States, its agencies and instrumentalities, and where the collateral has been deposited with a trustee or custodian bank in an irrevocable trust or escrow account established for such purposes;
6. County, municipal or school district direct debt obligations for which an ad valorem tax may be levied or bond and revenue anticipation notes, money judgments against such county, municipality or school district ordered by a court of record or bonds or bond and revenue anticipation notes issued by a public trust for which such county, municipality or school district is a

beneficiary thereof. All collateral pledged to secure public funds shall be valued at no more than market value;

7. Money market mutual funds regulated by the Securities and Exchange Commission and which investments consist of obligations of the United States, its agencies and instrumentalities, and investments in those items and those restrictions specified in paragraphs 1 through 6 above;
8. Warrants, bonds or judgments of the district;
9. Qualified pooled investment programs through an interlocal cooperative agreement formed pursuant to applicable law and to which the board of education has voted to be a member, the investments of which consist of those items specified in paragraphs 1 through 8 above, as well as obligations of the United States agencies and instrumentalities;
10. Investment programs administered by the state treasurer; or
11. Any other investment that is authorized by law.

Investment Philosophy

This policy shall be based upon a “prudent investor” standard. The board of education recognizes that those charged with the investment of public funds act as fiduciaries for the public, and, therefore the treasurer is directed to exercise the judgment and care that persons of ordinary prudence, discretion, and intelligence exercise in the management of their own affairs as to the permanent non-speculative disposition of their funds, with due consideration of probable income earnings and probable safety of capital. In investing the district’s funds, the treasurer shall place primary emphasis on safety and liquidity of principal and earnings thereon.

Liquidity

Available funds will be invested to the fullest extent practicable in interest-bearing investments or accounts, with the investment portfolio remaining sufficiently liquid to meet reasonably anticipated operating requirements.

Diversification

The investment portfolio will be reasonably diversified so as to avoid any one investment having a disproportionate impact on the portfolio. Provided this restriction will not apply to securities of the United States Treasury backed by the full faith and credit of the United States Government.

Safety of Principal

Although investments are made to produce income for the district, investments will be made in a manner that preserves principal and liquidity.

Yield

The portfolio will be designed to attain maximum yield within each class of investment instrument, consistent with the safety of the funds invested and taking into account investment risk and liquidity needs.

Maturity

Investments may have maturities extending to 12 months, provided sufficient liquidity is available to meet major outlays, and except that general fund investments may not exceed 3 months.

Quality of the Instrument and Capability of Investment Management

The superintendent shall be responsible for seeing that the treasurer and any assistant treasurer are qualified and capable of managing the investment portfolio and satisfactorily complete any investment education programs required by state law or by the board of education.

Safekeeping and Custody

The treasurer will maintain a list of the financial institutions and pooled investment programs governed by an interlocal cooperative agreement formed pursuant to OKLA. STAT. tit. 70 § 5-117b which are authorized to provide investment services, and will maintain a separate list of financial institutions with collateral pledged in the name of the district.

1. Securities purchased from a bank or dealer, including any collateral required by state law for a particular investment, shall be placed under an independent third-party custodial agreement. The Trust Department of a financial institution will be considered to be independent from the financial institution.
2. All securities will be in book entry form, and physical delivery of securities will be avoided.
3. Telephone transactions may be conducted, but such transactions must be supported by written confirmation, which may be made by way of a facsimile on letterhead with authorized signatures of the safekeeping institution.
4. Written transactions and confirmations of transactions by computer connections will be kept in the treasurer's office.

Reporting and Review of Investments

The treasurer will prepare an investment report to be submitted to the board of education on at least a monthly basis. The report will include:

1. A list of individual securities held at the end of the reporting period.
2. The purchase and maturity dates of these securities.
3. The name and fund for these securities.

4. The yield rate of these securities.
5. Any collateral pledged by a custodian.

The board of education shall review the treasurer's investment performance on a regular basis that is no less frequent than monthly.

Depositing of Interest

Unless otherwise directed by the board of education through policy or by special directive, by the Oklahoma Constitution, or by the federal government, income earned from the investment of non-activity funds shall be deposited in the general fund or building fund, and income earned from the investment of activity funds shall be deposited as directed by the board of education.

EMPLOYEE FUNDRAISING

The board prefers to limit fundraising and seeks to provide all necessary furniture and supplies for district use. This practice safeguards standardization throughout the district's programs, allows for appropriate oversight of activity funds, and ensures the district meets its obligations for equity in its programs.

The board also acknowledges that fundraising is a reasonable way to pay for special projects and activities. In order to ensure that fundraising efforts do not inadvertently impede the district's overall financial plans or create disorder within the district, the board will annually approve a fundraising schedule at the beginning of the school year. The board may also approve additional fundraising throughout the year as it deems appropriate.

Any employee who wishes to conduct fundraising apart from the master schedule must obtain prior approval from the board. This approval may be sought by submitting a request for board consideration to the Assistant Superintendent. The Assistant Superintendent has full discretion in determining whether to bring a fundraising request before the board.

Unless the board grants authorization, no employee may solicit donations for any purpose connected with the school. This prohibition includes, but is not limited to: raffles, any type of sale (bake sales, rummage sales, etc.), requests for donations, and/or the use of crowdfunding websites (GoFundMe.com, DonorsChoose.org, etc.).

Any employee who is granted authorization to engage in fundraising activities must adhere to all requirements established by the Assistant Superintendent. These requirements include but are not limited to identifying:

- the group or activity benefitting from the funds
- the individuals who will participate in the fundraiser, including the school site involved
- the type of fundraiser, including specific products or services to be sold, auctioned, etc.
- the proposed dates for the fundraiser
- the employee who will oversee the fundraiser
- the estimated amount of revenue to be generated per unit and in total
- the procedural safeguards to be utilized to ensure the security of all funds
- whether the activity complies with the district's wellness policy or would use one of the site's exceptions.

The Assistant Superintendent is responsible for updating the board at each of its meetings regarding any fundraising activities apart from the board's master schedule.

PUBLIC GIFTS TO THE SCHOOLS

The board of education assumes responsibility, within its financial capabilities, for providing at public expense all items of equipment, supplies and services that may be required in the schools under its jurisdiction. Gifts, grants or bequests will be accepted and the action recorded, provided the conditions of acceptance do not remove any degree of control of the district from the board and will not cause inequitable treatment of any student(s) or student group(s).

Propositions giving funds, equipment or materials to the school with a “matching agreement” or restriction are generally not acceptable. Acceptance of donated equipment or materials may depend upon compliance with the board’s policy of standardizing materials and equipment in the district, which could restrict gifts purchased by parent-teacher organizations to individual schools. The acceptance of a gift for a particular school, however, indicates the board’s approval of the use the benefactor specified.

Any person or organization desiring to give a gift or make a grant or a bequest to the board should contact the superintendent, who may accept the gift, thank the donor, and inform the board, except that offers of real property will be accepted only by the board. Also, where the appropriateness of a gift is in doubt, the superintendent will refer the matter to the board for its acceptance or rejection. For example, single gifts of considerable value exhibiting the donor’s name or business shall be considered on an individual basis by the board.

All conditional gifts must be approved by the board.

Any gift or grant accepted by the board or the superintendent as its executive officer will become the property of the board of education and will comply with all state and federal laws, including but not limited to the rules outlined in the FCC’s 6th Report and Order. Specifically, E-Rate applicants are prohibited from soliciting or accepting any gift or other thing of value from a service provider participating in or seeking to participate in the E-Rate program. It is a violation for any service provider to offer or provide any gift or other thing of value to those personnel of eligible entities involved with the E-Rate program.

ANNUAL STATISTICAL/FINANCIAL REPORTS

The board of education will make annual statistical and financial reports to the State Board of Education in a timely manner. The statistical report will be made as of June 30. Each of such reports will be filed with the State Board of Education as soon as information is available following the effective date of such reports.

Reference: 70 OKLA. STAT. §5-128

SURETY BONDS FOR SUPERINTENDENT AND FINANCIAL OFFICERS

The superintendent and any financial officer of the district are required to furnish a surety bond in the penal sum of not less than One Hundred Thousand Dollars (\$100,000.00) or an amount otherwise set by law or set by the State Board of Education to assure the faithful performance of the duties of the superintendent and financial officers.

The board finds that a reasonable definition of “financial officer” is any person whose job description or board policy or practice requires that he or she supervise or handle monetary receipts or disbursements on a reasonably consistent basis and any person who has oversight of funds or who actually transacts financial business on behalf of the district. In accord with this definition the board defines “financial officers” to include the individuals holding in whole or in part the following positions or their functional equivalent: chief financial or business officer, encumbrance clerk, payroll clerk, treasurer, assistant treasurer, or activity fund custodian. Provided however, the bonding requirements of this policy shall not apply to the treasurer which requirements are specifically governed by OKLA. STAT. tit. 70, §5-115 (1991).

The requirement as to the terms, conditions, penalty, amount or quality or type of surety shall be deemed to mean the furnishing of a separate bond or surety contract for each individual officer or employee, or the furnishing of a “blanket bond”. The latter means a school district officer and employees blanket position bond which covers all officers and employees up to the penalty of the bond for each officer and employee and the full penalty of the bond is always enforced during its term and no restoration is necessary and there is no additional premium after a loss is paid.

The surety bonds required by §5-116a shall be furnished by a company duly qualified under the insurance laws of Oklahoma and shall be purchased by the district. Each surety bond shall be payable to the district and require “financial officers” and the superintendent to faithfully perform their duties during their employment or term of office and properly account for all monies and property received by virtue of their position or employment.

In the event of a conflict between this policy and any opinion of a court of competent jurisdiction or an opinion of the Oklahoma Attorney General regarding who constitutes a “financial officer” of the district, the opinion will be deemed to control over any contradictory definition in this policy.

Reference: 70 OKLA. STAT. §5-116a

ACTIVITY FUNDS

The board of education will exercise complete control over all activity funds and will adopt appropriate rules and regulations for handling, expending and accounting for all such funds.

At the beginning of each fiscal year, the board will approve all school activity fund subaccounts, all subaccount fund raising activities and all purposes for which the monies collected in each subaccount can be expended. The board will approve any activity fund raising events during the fiscal year.

The superintendent will cause the activity account to be audited annually by a certified public accountant who will be selected by the board. The audit will be furnished to the board, and the cost of the audit will be paid from the general fund.

No expenditures will be made from activity funds except by check and on the authorization of the sponsor of the group to whom the fund belongs. All such checks are to be issued and signed by the custodian of the activity fund and countersigned by a person designated by the board.

All activity monies will be deposited with the office of the superintendent. The custodian of such funds will cause the funds to be deposited daily with the central office.

The superintendent will cause to be kept complete and accurate accounts of all activity funds and will see that monthly reports are made to appropriate parties.

The school activity fund custodian will be appointed by the board of education. The custodian will provide a surety bond in an amount determined by the board, but not less than one thousand dollars (\$1,000.00).

These provisions will not apply to funds collected by student achievement programs or parent-teacher associations and organizations that are sanctioned by the board of education.

Reference: 70 OKLA. STAT. §5-129

FEDERAL PROGRAM COMPLAINTS

The district receives federal funds and the board has established this policy to help ensure compliance with federal grant requirements. Any student, parent, community member or employee who believes the district has violated any regulation connected with the expenditure of federal funds should notify the district using the process outlined in this policy. This policy specifically covers, but is not limited to, complaints related to the following issues:

- Use of Title I funds
- Flexible Learning Program
- Parental involvement
- Private school access to federal funds
- Homeless student enrollment, transportation and barriers to education
- Teacher and principal training and recruiting
- Math and science partnerships
- Enhancing education with technology
- English language acquisition
- Safe and drug free schools
- Community learning centers
- Innovative programs
- Small, rural, and/or low-income school programs

Definitions

Grievance Coordinator:

The person designated to process complaints, moderate and keep records during hearings. The grievance coordinator is:

Assistant Superintendent
Hilldale Public Schools
313 E. Peak Blvd.
Muskogee, OK 74403

(918) 683-0273

Grievant:

The person making the complaint.

Respondent:

The person alleged to be responsible for the improper activity contained in the complaint. The term may be used to designate persons with responsibility for a particular action or those persons with supervisory responsibility for procedures and policies in those areas covered in the complaint.

Day:

Day means a working day when the district's main administrative offices are open. The calculation of days shall exclude Saturdays, Sundays and legal holidays.

Procedural Steps

Step 1:

Address the problem informally. Prior to filing a written complaint, individuals are encouraged to visit with the responsible party or a school administrator and make reasonable efforts to resolve the problem. School employees are required to participate in this process.

Step 2:

If the problem was not resolved informally, or if a parent, student or patron believes informal resolution is not advisable, the grievant may submit a complaint to the grievance coordinator on the attached form. The form must contain all the requested information.

The grievance coordinator will conduct an impartial investigation within ten (10) days of receipt of the complaint (or as soon as reasonably possible given the circumstances, but not more than thirty (30) days). The investigation will include, but not be limited to, interviewing the grievant, respondent, and witnesses, and reviewing relevant documents. The grievance coordinator will specifically ask the respondent to confirm or deny facts, accept or reject the grievant's requested action, and outline alternatives.

After the investigation, the grievance coordinator will prepare a written decision regarding the results of the investigation. The decision will be mailed to the grievant, respondent, and superintendent within five (5) days of the conclusion of the investigation.

Step 3:

If either the grievant or respondent are dissatisfied with the step 2 decision, he or she may appeal. The grievance coordinator must receive a written notice of appeal within five (5) days of the appealing party's receipt of the step 2 decision or the

matter is deemed resolved. The appeal notice must include a specific statement explaining the basis for the appeal.

Within five (5) days of receipt of a timely appeal, the grievance coordinator will refer the matter to the superintendent (or other impartial individual if the superintendent is the respondent).

The superintendent (or other impartial individual if the superintendent is the respondent) will conduct a hearing within ten (10) days of his/her receipt of the appeal. The grievant, respondent and grievance coordinator will all be invited to attend the appeal hearing, and relevant employees are required to participate in this process.

At the hearing, the superintendent (or other impartial individual if the superintendent is the respondent) will review the information collected through the investigation and may ask for additional oral or written evidence from the parties and any other individual he/she deems relevant. The grievance coordinator will make arrangements to audiotape any oral evidence presented.

After the investigation, the superintendent (or other impartial individual if the superintendent is the respondent) will prepare a written decision regarding his/her findings. The decision will be mailed to the grievant, respondent, and grievance coordinator within five (5) days of the conclusion of the appeal hearing.

Step 4:

If either the grievant or respondent are dissatisfied with the step 3 decision, he or she may appeal. The grievance coordinator must receive a written notice of appeal within five (5) days of the appealing party's receipt of the step 3 decision or the matter is deemed resolved. The appeal notice must include a specific statement explaining the basis for the appeal.

Within five (5) days of receipt of a timely appeal, the grievance coordinator will notify the board of education clerk. The board will conduct a hearing within thirty (30) days of the clerk's receipt of the appeal. The grievant, respondent and grievance coordinator will all be invited to attend the appeal hearing, and relevant employees are required to participate in this process.

At the hearing, the board may ask for oral and written evidence to be presented by both parties. The board clerk will make arrangements to audiotape any oral evidence presented.

After the hearing, the board clerk will prepare a written decision regarding the board's findings. The decision will be mailed to the grievant, respondent, grievance coordinator, and general counsel of the Oklahoma State Department of Education within five (5) days of the conclusion of the appeal hearing. The board's decision may be appealed by submitting a request to the Oklahoma State Department of Education's general counsel within thirty-five (35) days of the board hearing .

General Provisions

Extension of time:

Any time limits set by these procedures may be extended by mutual consent of the parties involved, although the total number of days from the date the complaint is filed until the board of education issues a final decision shall not exceed one hundred twenty (120) days.

Confidentiality of Records:

Complaint records will remain confidential, to the extent allowed by law, unless permission is given by the parties involved to release such information. All complaint records will be kept separate from any other records of the district. No complaint record shall be entered in any personnel file unless adverse employment action is taken against an employee. Complaint records shall be maintained on file for three years after complaint resolution.

Representation:

The grievant and the respondent may have a representative assist them through the grievance process and accompany them to any hearing.

Retaliation:

The district prohibits retaliation, intimidation, threats, or coercion related to any aspect of the grievance process, including but not limited to: making a complaint, testifying, assisting, appealing, or participating in any other proceeding or hearing. The district will take steps to prevent retaliation. These steps include notifying students and employees that they are protected from retaliation, making sure grievants know how to report future problems and making follow-up inquiries to see if there have been any new incidents. If retaliation occurs, the district will take strong responsive action.

Basis of Decision:

At each step in the grievance procedure, the decisionmaker will take or recommend appropriate measures based on the facts taken as a whole, as revealed by the investigation and hearing, and the totality of the circumstances, such as the nature, extent, context and gravity of the activities or incidents.

FEDERAL PROGRAMS

The district participates in a variety of federal programs and receives funding (“Awards”) through those programs. All district representatives will comply with all regulatory guidance and laws applicable to the individual programs.

The district will regularly monitor its compliance efforts and make appropriate information available to the federal awarding agency (“FAA”), state pass-through entity (“State Entity”), inspectors general, and/or US comptroller. The district will make required performance reports using OMB approved information collections reports.

Audits

If the district expends \$750,000 or more in federal awards during the fiscal year, it will have an audit conducted.

Employee Compensation

Regardless of the source of the funds, employees are paid pursuant to the district’s salary schedule for all work performed. If personnel costs are paid with Awards, those costs will be calculated as wages and fringe benefits permitted in 2 C.F.R. § 200.431 for services rendered during the relevant time period.

Employees who are paid with Award funds – in whole or in part - must maintain adequate records documenting the time spent performing each set of duties so that their compensation can be correctly allocated to the Award. 2 C.F.R. § 200.430

Travel and Conference Expenses

The district will follow its standard travel reimbursement and professional development policies and procedures when spending Award funds, except when a federal requirement is more stringent, in which case the district will adhere to the more stringent requirement. Any travel, conference / professional development participation and expenses will be reasonable, necessary, and related to the federal program tied to the Award.

Conflict of Interest/Mandatory Disclosure Regarding Contracting

The district will make written disclosure of any potential conflict of interest to the FAA or State Entity in accordance with the FAA’s policy.

All members of the board, officers, employees and agents of the district are expected to maintain high ethical standards and use good judgment in conducting school business. Members are also required to follow the same standards of professional conduct required of all district employees. Board members, officers, employees and agents of the district specifically agree to refrain from using their

position for any unfair personal or business advantage or engaging in any action which gives the appearance of such misconduct. Any board member who violates this policy will be subject to censure by the board, may be referred to the Oklahoma Ethics Commission, and may also be referred for criminal prosecution. Any officer, employee or agent of the district will be subject to disciplinary action, including but not limited to termination and/or prosecution for violation of the requirements related to standards of conduct and conflict of interest.

Business Arrangements and Financial Transactions

All board members are required to familiarize themselves with and comply with all the requirements of OKLA. STAT. tit. 70 § 5-124.

As required by law, the district will not contract with any member of the board or any company, individual or business concern in which any member of the board is directly or indirectly interested. A member of the board is considered to be interested in any contract with a company, individual or business concern if the member of the board or any member of the immediate family (including a partner) of the member of the board owns any substantial interest in the same, or if an organization employs or is about to employ one of these parties. The only exceptions will be those allowed by OKLA. STAT. tit. 70 § 5-124.

If a contract is allowed by an exception listed in OKLA. STAT. tit. 70 § 5-124, then the board will not give special consideration to any company based on its affiliation with a board member or a board member's family or partner. If the board is seeking to conduct business with a company affiliated with a board member (or a board member's family member or partner) that member will abstain from the contracting process unless a statutory exception applies.

Gifts

Board members may not seek or accept gifts, payments, services, entertainment, travel, valuable privileges, etc. from individuals or vendors who do business or seek to do business with the district, although board members may accept common courtesies such as meals and promotional items as are customarily exchanged in the normal course of business. These courtesies must be of nominal value only. Board members are expected to use good judgment in accepting such courtesies and must avoid any conflict of interest or even the appearance of impropriety.

Reporting Misconduct

In the event a board member engages in misconduct such as fraud, bribery, or gratuity violations, the board president, or the vice president if the president is the board member engaging in the misconduct, will report the violation to the FAA or State Entity in order to help prevent or prosecute waste, fraud, and abuse.

Financial Management Procedures

Internal Controls

The Assistant Superintendent is responsible for implementing appropriate internal controls over Award funds which are consistent with 2 C.F.R. Part 200 Subpart E. This includes, but is not limited to, reviewing and comparing Awards, budgets, and allocations to determine whether the Awards are being expended appropriately and in compliance with relevant guidelines. The Assistant Superintendent is also responsible for taking prompt action if noncompliance is discovered. The Assistant Superintendent is required to take reasonable measures to safeguard protected personally identifiable and protected information.

General Recordkeeping

The district will expend all Awards and account for those Awards in accordance with all applicable laws and regulations. The Assistant Superintendent is responsible for maintaining appropriate records, documentation, and oversight related to all Awards. This includes, but is not limited to the following:

- information to prepare all required reports
- compliance documentation to establish conformity with federal statutes, regulations, and the specific terms and conditions of an Award
- proof of the appropriate expenditure of Awards
- records of receipt/expenditure of Awards, including the federal program under which the Award was made, any applicable CFDA number, Award identification number and year, name of the FAA, and name of any applicable State Entity
- accurate, current, and complete disclosure of the financial results of all Awards in accordance with current OMB standards and the terms of the Award
- source documents showing the application for funds, authorizations, obligations, unobligated balances, assets, expenditures, and income and interest related to an Award
- evidence that all Award funds, property, and other assets have been safeguarded and are used solely for authorized purposes
- a comparison of Award expenditures and budgets
- the district's written procedures to minimize the elapsed time between the transfer of funds and disbursement by the district, when possible, to receive funds in advance from the FAA
- the district's written procedures for determining the allowability of costs in accordance with 2 CFR part 200 subpart E and the terms and conditions of the Award

Records Retention Timeline

The district will maintain all records pertinent to any Awards it receives. All documents will be maintained a minimum of 3 years from the date of submission of the final expenditure report OR 3 years from the date of the quarterly or annual financial report UNLESS there are pending claims related to project OR the FAA has notified the district the records should be maintained longer OR the records have been transferred to or are maintained by the FAA or State Entity. The district will retain records for real property and equipment maintained for 3 years after final disposition.

Interest

The Assistant Superintendent is responsible for maintaining advance Award payments in an interest-bearing account unless:

- the district receives less than \$120,000 in Awards per year
- the district would earn less than \$500 per year in interest on federal cash balances
- the depository would require an unfeasible minimum balance
- the banking system prohibits interest bearing accounts

The Assistant Superintendent is responsible for retaining up to \$500 per year of interest earned on Awards for the district to utilize for administrative expenses. The Assistant Superintendent is responsible for remitting any additional earned interest to the Department of Health and Human Services Payment Management System.

Budgeting

The Assistant Superintendent is responsible for regularly reviewing budgets and expenses and making appropriate reports and requests for deviations in the budget or project scope.

Real Property, Equipment, and Supplies

The district will appropriately insure all real property, equipment, and supplies ("Property") acquired or improved with Awards, and will take reasonable steps to safeguard and adequately maintain the Property. All Property will be labeled.

The district will not encumber Property acquired or improved with an Award without prior approval from the FAA.

The district will maintain appropriate records of the Property. These records will include, as applicable, a description, serial/identification number, source of funding (including the Federal Award Identification Number), name of title holder, acquisition date, cost, percentage of federal participation in the project's cost, location, use and condition, disposition data (including date of disposal and sale price).

The district will conduct an inventory of Property at least every 2 years, and will review/update the inventory annually. The district will include the following

information on the inventory: fund source, description, serial number, acquisition date, acquisition cost, and location.

The district will use the Property as long as needed, and may make the Property available for other federal projects as long as this will not disrupt the intended use.

Once the Property is no longer needed, it will be disposed of in accordance with current federal standards.

Property purchased for a Title I, Part A Targeted Assistance program will be reserved only for identified students.

General Procurement Standards and Vendor Selection

General Standards

The district will follow its standard procurement policies and procedures when spending Award funds, except when a federal requirement is more stringent, in which case the district will adhere to the more stringent requirement. The Assistant Superintendent is responsible for overseeing that contractors perform in accordance with the terms of their contracts/purchase orders.

Any employee who has oversight or compliance responsibilities for administering an Award will comply with the district's stated conflict of interest policy above.

The district will use processes and analysis designed to avoid acquiring unnecessary and duplicative items and will actively attempt to make economical purchases with Award funds. This may include, when appropriate, consideration of leases, shared service agreements, use of federal excess and surplus property, and value engineering clauses in construction contracts.

The district will only award contracts to responsible contractors possessing the ability to successfully perform. In determining whether a contractor is a responsible contractor, the district will consider integrity, compliance with public policy, record of past performance, and financial and technical resources.

The district will maintain adequate records detailing the history of procurement, including the rationale for the procurement method, selection of the contract type, contractor selection or rejection, and the basis for the contract price for all Awards.

In procurement with Awards, the district will only use time and material type contracts after determining that no other contract is suitable and if the contract includes a ceiling price that the contractor exceeds at its own risk. If such a contract is used, the district will utilize extra oversight on the project.

The district will utilize good practices and sound business judgment to settle all procurement issues related to Awards, including source evaluations, protests, disputes, and claims.

Procurement Methods

For procurement processes with Award funds, the district will make technical specifications on proposed procurements available to the FAA or State Entity if requested.

All contracts connected with an Award will comply with 2 C.F.R. §§ 200.318-.326.

For all procurements using funds from an Award, the district will utilize one of the procurement methods identified below:

- Micro-purchase will be utilized for purchases under \$10,000 (or \$2,000 if the purchase is subject to the Davis-Bacon Act). The district will attempt to distribute these purchases equitably among qualified suppliers, and the district will not solicit competitive quotations if the district believes a purchase price is reasonable.
- Small purchase procedures will be utilized for purchases under the Simplified Acquisition Threshold (\$250,000). When utilizing this procurement method, the district will obtain quotes from an adequate number of qualified sources.
- Sealed bids will be utilized when complete, adequate, and realistic specifications are available, multiple bidders are willing and able to compete effectively for the business and the procurement lends itself to a firm fixed price and the successful bidder can be made principally on the basis of price. When utilizing this procurement method, the district will timely and publicly issue the invitation for bids - including adequate information about the project. All the bids will be publicly opened as prescribed in the invitation for bids, and the contract will be awarded in writing to the lowest responsible bidder. If a sealed bid is rejected, the district will document the reason for the rejection.
- Competitive proposals will be utilized when other procurement methods are not appropriate. The first step of the competitive proposal process is getting an independent estimate. When utilizing this procurement method, the district will publicize the evaluation factors and their relative importance to an adequate number of qualified sources and will consider all responses. The district will use an established, written method for conducting technical evaluations of the proposals (including receiving independent estimates before receiving bids or proposals) and award the project to the proposal which is most advantageous to the district.

The district may also use competitive proposals for qualifications-based procurement of architectural/engineering (A/E) services to award proposals to the most qualified competitor -- subject to fair and reasonable compensation. The district will not use this type of procurement to purchase other types of services through A/E firms.

- Noncompetitive proposals will be utilized when an item is only available from a single source, there is an urgent situation which precludes the delays associated with competitive selection, the FAA or State Entity has expressly

authorized this method, or solicitation from multiple sources has yielded inadequate competition.

- Negotiating Profit will be negotiated as a separate element of the price for each contract if there is no price competition and in all cases where cost analysis is performed.

For all procurements using funds from an Award, the district:

- will not utilize a cost plus a percentage of cost or percentage of construction cost method of contracting
- will not accept bids or proposals from a contractor that develops or drafts specifications, requirements, statements of work, invitations for bids, or similar documents
- will not unnecessarily restrict bidders to a specific geographic area
- will ensure that if a list of prequalified persons, firms or products are used, that the list is current and includes enough qualified sources to ensure maximum open and free competition
- will take appropriate affirmative steps to ensure that small and minority businesses, women's business enterprises, and labor surplus area firms ("target groups") are included in its contracting process, including:
 - including target groups on the solicitation list and ensure that these target groups are solicited whenever they are potential sources
 - dividing total requirements, if economically feasible, to permit maximum participation by target groups
 - establishing delivery schedules, when possible, which encourage target groups to participate
 - utilizing groups which interface with the target groups (e.g., Small Business Administration, Minority Business Development Agency of the Department of Commerce, etc.)
 - requiring the prime contractor, if using subcontracts, to take these same affirmative steps to include target groups
 - ensuring the district and all its contractors comply with the with § 6002 of the Solid Waste Disposal Act, including procuring only items which contain the highest percentage of recovered materials practicable for purchases over \$10,000, procuring solid waste management services which maximize energy and resource recovery, and establishing an affirmative procurement program for procuring recovered materials identified in EPA guidelines

Suspension and Debarment

The following language shall be included within the terms of any contract for goods and services that will be paid for using federal funding:

Certification Regarding Debarment, Suspension and Ineligibility

To the best of its knowledge and belief, the contractor or any of its principals are not presently debarred, suspended, proposed for debarment or otherwise declared ineligible for the award of contracts by any Federal agency by the inclusion of the contractor or its principals in the current "LIST OF PARTIES EXCLUDED FROM FEDERAL PROCUREMENT OR NONPROCUREMENT PROGRAMS" published by the U.S. General Services Administration Office of Acquisition Policy.

The prospective lower tier participant shall provide immediate written notice to the District if at any time the prospective lower tier participant learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances. Should the prospective lower tier participant enter into a covered transaction with another person at the next lower tier, the prospective lower tier participant agrees by accepting this agreement that it will verify that the person it intends to do business with is not excluded or disqualified.

SCHOOL RAFFLES

OKLA. STAT. tit. 21 § 1051 allows schools and their affiliated student groups and parent-teacher groups to raise money by conducting raffles in exchange for voluntary contributions. While this law allows for the issuance of raffle tickets in exchange for a *voluntary* contribution, the *sale* of raffle tickets is against the law and subjects such persons or groups selling the tickets to criminal liability. The district provides schools, student groups and parent-teacher groups with the option of conducting raffles. However, in order to comply with state law as well as prevent exploitation of students, parents and the community, the district requires that all such raffles be conducted within the limitations and guidelines provided below.

Groups Allowed to Conduct Raffles on School Property

Only a school of the district, or a student or parent-teacher group affiliated with a school of the district may conduct a raffle or raffle-related activities on school property. The group conducting such a raffle is the “sponsoring organization” for purposes of this policy.

Prior Approval of Raffles Required

Raffles and raffle-related activities are not permitted on school property unless prior approval has been given, in writing, by the school principal. In order to receive approval, the student group must prepare a *Request for Raffle* form and submit it to the school principal. The principal will not issue an approval unless the form is complete and unless the organization is in compliance with the School Raffle Policy and policy concerning student fund raising activities. In addition, before providing the approval, the principal must obtain the approval of the board. The principal may deny a request for a raffle at his or her discretion, taking the purpose of the fundraising into account as well as the number of raffles or other fund-raising activities already approved for the calendar year. This decision may be appealed to the superintendent.

If the raffle is being sponsored by the school generally (not by a student or teacher-parent group), approval for such a raffle must be granted by the board upon the request of the school’s principal or the superintendent.

General Requirements

Raffle tickets may be issued only in exchange for a voluntary contribution. Specifically, there may be no set price for a raffle ticket, and the issuance of a raffle ticket may not be contingent on a financial contribution to the sponsoring organization. However, the sponsoring organization may determine a suggested voluntary contribution amount and may print this amount on the ticket as the suggested voluntary contribution.

The sponsoring organization may not hire or contract with any person or business to conduct the raffle, to sell raffle tickets, or to solicit contributions in connection with a raffle on its behalf.

No staff member or student shall be coerced or forced to participate in any raffle-related activity.

All tickets remain the responsibility of the sponsoring organization with accountability to the school's principal.

The fair market value of any one prize may not exceed \$5000.00.

Information Printed on Tickets

The following information must be printed on the raffle ticket:

1. The name of the organization sponsoring the raffle;
2. Date, time and place of drawing;
3. The district's name; and
4. Consecutive numbering.

Records of Raffle Activity

The sponsoring organization must report in writing to the school's principal the following information within five days of the raffle drawing:

1. Name of raffle winner(s) and respective prize(s), including the fair market value of the prize;
2. Total raffle tickets sold;
3. Total gross receipts;
4. Details of expenses related to the activity;
5. Net proceeds (gross proceeds minus expenses); and
6. Details of the expected use of the profits from the activity.

If the fair market value of the prize is \$600.00 or more, then the school must also obtain and keep for its records the social security number of the prize winner and his/her address.

If the raffle is being sponsored by the school generally (not by a student or teacher-parent group), this information should be submitted to the superintendent.

Federal Taxation Issues

The fair market value of the prizes must be disclosed to the respective winners. If the fair market value of the prize is \$600.00 or more, then the sponsoring organization must issue an IRS Form 1099 to the IRS and the recipient. Copies of the Form 1099's must be sent to the district's business office. Note that prizes with a fair market value of \$5000.00 or more are prohibited by the district.

Reference: 21 OKLA. STAT. §1051

EMPLOYEE TRAVEL EXPENSE REIMBURSEMENT

Statement of Policy

The Hilldale Board of Education believes that expenses incurred by individuals for travel on behalf of the district should be reimbursed by the district. Reimbursement to individuals should be made upon approval by the Board of Education after proper presentation of supporting documentation, as defined below.

Definitions

Terms used in this policy are defined as follows:

1. "Travel" means transportation arrangements made or incurred by car, airplane, train, bus or other means or hotel accommodations and meals, for the purposes of advancing the interests of the district. Travel may be within or without the district. Travel does not mean transportation to and from the employee's residence or abode to the district for employment.
2. "Employee" means any person employed by the district or a member of the board acting in his or her capacity as a board member on behalf of the district.
4. "Expenses" means any actual indebtedness incurred and paid by an individual employee on behalf of the district, for the benefit of the district or for the purpose of advancing the interests of the district, with the intention of being reimbursed by the district.

Expenses may include, but are not limited to, these items:

- A. air, bus, taxi or train fares and car rentals;
 - B. meals, unless payment is made on a per diem basis established by the board;
 - C. hotel or motel accommodations;
 - D. other travel related expenses when applicable, such as mileage; and
 - E. registration fees and meeting expenses.
5. "Receipt" means an invoice document issued by a vendor which has been paid as an expense by an employee. A receipt must contain the following information:
 - A. date indebtedness incurred;

- B. date indebtedness paid;
- C. amount paid;
- D. amount of indebtedness;
- E. who paid the indebtedness;
- F. method of payment;
- G. the purpose of the indebtedness including an itemized description of the goods or services purchased; and
- H. the name, address and telephone number of the vendor.

A credit card slip alone is not a receipt.

- 6. "Supporting documentation" means a memorandum to the board containing a request for reimbursement and explanation of the reason for the expense. All receipts for which reimbursement is sought and a travel claim must be attached to the memorandum.
- 7. "Travel claim" is a document prepared by an employee who seeks reimbursement which contains the following information:
 - A. dates entering and ending travel status;
 - B. points of travel;
 - C. mileage to and from destination(s) when personally owned vehicle is used;
 - D. amount per mile reimbursed;
 - E. air, bus or train fares when public transportation is used;
 - F. parking fees, taxi fares, car rentals and turnpike fees;
 - G. meals or per diem rate established by the board of education, if any;
 - H. purpose, time, location and those in attendance for meals;
 - I. motel and hotel expenses;
 - J. registration fees and meeting expenses;
 - K. other school business expenses such as telephone calls, tips, etc., which properly occur during the time an employee is in travel status;
 - L. encumbrance to be charged for expense; and

- M. by whom the travel activity was approved.
8. "Credit card slip" is the customer's copy of the credit card charge form. A credit card slip alone is not a receipt. To qualify as a receipt a credit card slip must be attached to a supporting invoice issued by the vendor which contains all the information required of a receipt.
 9. "Vendor" means the individual or entity that provided the goods or services to the district for which reimbursement is sought and a receipt for payment has been issued.
 10. "Meals" means actual food expenses incurred while traveling outside the district or within the district if allowed by other board policies.
 11. "Per diem" expenses may be authorized and approved only if overnight travel is required. Per diem expenses are for expenditures of undocumented meal expenses and other incidentals. Meal ticket receipts are not required for per diem allowances. Reimbursement will be computed on the current Internal Revenue Service (IRS) rate at any given time and prorated on each fraction thereof, subject to the following conditions:
 - a. Travel status commences when employee leaves Hilldale or authorized point of departure and ends when employee returns to Hilldale or authorized final destination.
 - b. Per diem is calculated on a twenty-four (24) hour basis not on the calendar day.
 - c. Other expenses incurred by employees such as car rental, taxi service, toll gates, etc. will be handled on a receipt basis.
 12. "Requisition" means the request by the employee for travel reimbursement. At the time of the requisition the employee is approved for per diem or receipt reimbursement.

Procedure for Reimbursement

To obtain reimbursement for travel expenses the employee must:

1. Prepare supporting documentation to the board of education with attached receipts and travel claims. Requests for reimbursement with insufficient or incomplete documentation will be denied.
2. Submit supporting documentation with attachments to the board treasurer. The board treasurer and superintendent of schools or his or her designee will review the memorandum and attachments for completeness and accuracy. If the memorandum is complete and accurate the board treasurer will advise the board clerk to list the reimbursement request as an agenda item on the next available board meeting.
3. At the next available board meeting the board will consider the reimbursement request and authorize the board treasurer to issue a warrant to reimburse the employee for the amounts, if any, deemed appropriate by

the board. The board has absolute discretion to deny the request or approve it in whole or in part. The board's decision is final.

4. The board treasurer will issue the warrants for reimbursement authorized by the board as soon as is practicable following the board's action.

Other Issues

1. A request for reimbursement must be made within thirty (30) days after the vendor's invoice is issued. Notwithstanding this time limitation, all requests for reimbursement must be made prior to the end of the fiscal year in which the vendor's invoice was issued and services rendered, and it must be submitted in sufficient time to allow the board to take action at its last regular meeting of the fiscal year. Reimbursement requests not complying with these requirements will be denied unless unusual circumstances are presented to and approved by the board.
2. Reimbursements issued by the board are only for the actual amount of out of pocket expenses paid by the employee. No additional charges may be added by the employee and the employee may not obtain a warrant for funds he or she expects to pay or incur in the future.
3. An employee may elect a meal expense per diem in lieu of reimbursement for actual out-of-pocket meal expenses in an amount equal to the per diem allowance authorized by law for state employees in OKLA. STAT. tit. 74 § 500.8. The superintendent shall, upon request, provide any district employee with a copy of the current provisions of OKLA. STAT. tit. 74 § 500.8 for review.
4. According to Internal Revenue Service regulations, meal reimbursements are to be reported as taxable income, unless the employee is required to work extensive hours requiring rest or incur overnight lodging, and there is a substantiated business connection. When meal reimbursements are determined to be taxable, the district is required to withhold Federal income tax, social security (FICA) and Medicare tax and to pay matching employer contributions for FICA and Medicare tax. When seeking reimbursement for business related meals, employees must document the purpose of the meeting, the time, location and who was in attendance. Reimbursement of any taxable non-overnight meals will be paid in the employee's next regularly scheduled paycheck.
5. Any interpretation of this policy shall be made solely by the board of education and shall be binding in all respects.
6. Violation of any of the provisions of this policy may result in dismissal, nonrenewal, or other adverse action.

Reference: 70 OKLA. STAT. §5-117

REIMBURSEMENT FOR COCURRICULAR ACTIVITY EXPENSES

Statement of Policy

Expenses for necessary meal and lodging expenses incurred by district students and sponsors involved in authorized school-sponsored cocurricular activities should be reimbursed by the district.

Definitions

Terms used in this policy are defined as follows:

1. "Student" means any student of the district who is participating in an authorized school-sponsored cocurricular activity.
2. "Sponsor" means an employee of the district or another person who has been authorized by the superintendent or the board of education to serve as a sponsor for an authorized school-sponsored cocurricular activity.
3. "Expenses" means any actual indebtedness incurred and paid by an individual student or sponsor for meals and hotel or motel accommodations associated with an authorized school-sponsored cocurricular activity with the intention of being reimbursed by the district.
4. "Receipt" means an invoice document issued by a vendor which has been paid as an expense by a student or sponsor. A receipt must contain the following information:
 - A. date indebtedness incurred;
 - B. date indebtedness paid;
 - C. amount paid;
 - D. amount of indebtedness;
 - E. who paid the indebtedness;
 - F. method of payment;
 - G. the purpose of the indebtedness including an itemized description of the goods or services purchased; and
 - H. the name, address and telephone number of the vendor.

A credit card slip alone is not a receipt.

5. "Supporting documentation" means a memorandum containing a request for reimbursement and explanation of the reason for the expense. All receipts for which reimbursement is sought and a claim must be attached to the memorandum.

6. "Claim" is a document prepared by a sponsor who seeks reimbursement which contains the following information:
 - A. a description of the authorized school-sponsored cocurricular activity;
 - B. date of authorization by the board of education;
 - C. meals;
 - D. motel and hotel expenses; and
 - E. encumbrance to be charged for expense.
7. "Credit card slip" is the customer's copy of the credit card charge form. A credit card slip alone is not a receipt. To qualify as a receipt a credit card slip must be attached to a supporting invoice issued by the vendor which contains all the information required of a receipt.
8. "Vendor" means the individual or entity that provided the goods or services to the sponsor or student for which reimbursement is sought and a receipt for payment has been issued.
9. "Meals" means actual food expenses incurred while participating in the authorized school-sponsored cocurricular activity.
10. "Authorized school-sponsored cocurricular activity" means participation in an event approved in advance by the board of education for a particular group of district students and their sponsor.

Procedure for Reimbursement

To obtain reimbursement for expenses the sponsor must:

1. Prepare and maintain complete and accurate supporting documentation with attached receipts and claims for the sponsor(s) and students. Requests for reimbursement with insufficient or incomplete documentation will be denied.
2. Submit supporting documentation with attachments to the designated district employee/official.
3. The board has absolute discretion to deny the request or approve it in whole or in part. The board's decision is final.
4. The district will issue payment for reimbursement authorized as soon as practicable following the approval.

Other Issues

1. A request for reimbursement must be made within thirty (30) days after the vendor's invoice is issued.
2. Reimbursements will be issued only for the actual amount of expenses paid by the sponsor(s) and the students. No additional charges will be reimbursed. The district will not issue payment for funds a student or sponsor anticipates incurring in the future.

3. Reimbursement for necessary meal and lodging expenses incurred by district students and sponsors involved in authorized school-sponsored cocurricular activities may be made from the appropriate activity fund sub-account or from the general fund, as determined appropriate by the board of education.
4. Any interpretation of this policy shall be made solely by the board of education and shall be binding in all respects.
5. Violation of any of the provisions of this policy by a district employee/sponsor may result in dismissal or nonrenewal. Violation of the provisions of this policy by a student may result in disciplinary action.

Reference: 70 OKLA. STAT. §5-129

**STUDENT ACHIEVEMENT PROGRAMS AND PARENT-TEACHER
ASSOCIATIONS AND ORGANIZATIONS**

The board of education believes that student achievement programs (curricular, co-curricular and extracurricular) and parent-teacher associations and organizations can advance the educational goals of the board of education and confer a benefit to the students of the district. It is the purpose of this policy to establish guidelines for the sanctioning of student achievement programs and parent-teacher associations and organizations that raise money and collect revenues for the benefit of students. Only those student achievement programs and parent-teacher associations and organizations sanctioned in accordance with this policy will be exempt from the statutory controls over school activity funds found in the Oklahoma School Code, OKLA. STAT. tit. 70, § 5-129.

Sanctioning Procedure for Student Achievement Programs and Parent-Teacher Associations and Organizations

1. The district may sanction student achievement programs and parent-teacher associations and organizations that, according to the board's determination, advance the educational objectives of the district, are beneficial to students and meet the requirements of this policy.
2. In determining whether a student achievement program or a parent-teacher association or organization should be sanctioned by the district, the board of education may consider: (1) if the program, association, or organization promotes activities that are an extension, expansion, or application of the district curriculum; (2) if the program, association, or organization assists student government or activities in carrying out special projects or responsibilities; (3) if the program, association, or organization assists student clubs, organizations, and other student groups in raising funds to promote activities approved by the board of education; and (4) supplemental information provided by the student achievement program or by a parent-teacher association or organization in support of its application.
3. A written statement by a student achievement program or by a parent-teacher association or organization to the board of education requesting sanctioning shall include the following: (1) a statement of its purpose, goals, organizational structure, and membership requirements; (2) a detailed statement of how the district and its students will benefit if the organization is sanctioned; (3) a statement of nondiscrimination consistent with all Oklahoma and federal laws; and (4) financial and performance audits, if any, which have been performed on such program, association, or organization by an independent accounting firm.
4. The written statement shall be submitted to the superintendent for preliminary review. After the program, association, or organization's written statement has been reviewed by the superintendent, the superintendent shall make a

recommendation to the board of education. The board of education shall review the written statement, and shall sanction or decline to sanction the applicant. The decision of the board of education is final and nonappealable.

5. In order to maintain the status of a sanctioned program, association, or organization in accordance with this policy, the superintendent of schools or the board of education may require from any such program, association or organization, on an annual basis, that financial and performance audits be performed on the program, association, or organization by an independent accounting firm. If required by the superintendent of schools or the board of education, the audits shall be submitted to the superintendent within ninety (90) days of the superintendent's request. The board of education shall review any audits submitted and determine if the program, association, or organization is entitled to continue to be sanctioned in accordance with this policy and if its funds should continue to be exempt from the statutory controls over student activity funds found in the Oklahoma School Code, OKLA. STAT. tit. 70, § 5-129.
6. The superintendent of schools or the board of education may, at any time they deem warranted, request copies of any and all records maintained by the program, organization, or association. Copies of records must be promptly provided upon the request of the board or superintendent.
7. The board may, at its discretion, withdraw sanctioning at any time it deems it in the best interest of the district. Any decision of the board of education to withdraw sanctioning is final and non-appealable.
8. No program, association or organization sanctioned under this policy shall publish or otherwise publicly indicate in any manner that it has been sanctioned by the district under this policy.

AUDITOR

The board of education will provide for and cause to be made an annual audit of the district for each fiscal year. The audit will include a financial audit and a compliance audit of all district funds. Audits will be made at the end of each fiscal year at a minimum and may be required by the board at more frequent intervals.

A written report of the audit will be furnished to the board by the auditor. The board will conduct a final exit interview with the auditor at an open board meeting.

Reference: 70 OKLA. STAT. §22-103

PURCHASING AND DISTRIBUTION

It is the policy of the board of education that purchasing and distribution shall be under the supervision of the superintendent, but may be delegated in writing by the superintendent to a teacher. Written delegations of authority should contain specific limitations imposed by the board or superintendent upon the designee or may provide a complete delegation of purchasing and distribution duties. No person except the superintendent or the superintendent's designee shall make purchases without written authorization.

The superintendent should take advantage of discounts for buying in quantity and, if possible, purchase in sufficient quantities for one full school term. Requisitions for supplies shall follow the appropriate chain of command, originating from teachers to the superintendent. Purchases shall be made from local firms when economically wise to do so.

No expenditure involving an amount greater than \$500.00 shall be made except in accordance with a written contract or purchase order.

PROCUREMENT

General Fund Monies

To ensure fair and open competition in the purchase of needed equipment and supplies, the district shall seek quotes or proposals in the following manner:

Quotes/Requests for Proposals:

- Less than \$2,000 Shall be secured verbally. Purchase order may be approved by the superintendent or superintendent's designee.
- \$2,000 to \$10,000 Shall be obtained in written form from the supplier. Purchase order may be approved by superintendent or superintendent's designee.
- \$10,000 and over Shall be secured by sealed quotes or by formal request for proposal in accordance with specific procedures established by the superintendent. Purchase order or contract must be submitted to the board of education for approval before the award is made.

A summary of quotes and/or proposals will be attached to purchase orders.

Bids

No contract involving an expenditure of more than \$100,000 (or any construction management trade contract or subcontract exceeding \$50,000) for the purpose of constructing a building or making any improvements or repairs to school buildings (a "Public Construction Contract") shall be made except upon sealed bids in accordance with the Public Competitive Bidding Act of 1974, OKLA. STAT. tit. 61, § 101 et seq. (the "Act"). No such contract shall be split into two or more contracts involving sums below this threshold for the purpose of avoiding the requirements of the Act. The Act does not prohibit the district from erecting a building or making improvements on a force account basis. The term "force account" means the purchase of necessary materials and the use of the district's regularly employed staff to provide necessary labor.

Public Construction Contracts over \$10,000 but under \$100,000 may be awarded on the basis of written quotes to the lowest responsible qualified contractor. Public Construction Contracts for less than \$10,000 (or less than \$25,000 for minor maintenance and repair) may be negotiated with a qualified contractor.

New busses shall be purchased from the list maintained by the State Board of Education by sealed bid at a price not greater than the price filed with the State Board of Education in accordance with the provisions of OKLA. STAT. tit. 70, § 9-109.

Federal Funds

All purchases with federal funds will be made in accordance with the specific requirements associated with those funds (i.e., child nutrition, Title I, grants, etc.). These expenditures must be made in accordance with the Uniform Guidance, when applicable.

Reference: 61 OKLA. STAT. §103, 70 OKLA. STAT. §9-109

SELECTION OF A CONSTRUCTION MANAGER

Pursuant to 61 O.S. § 62, the Board of Education authorizes the Superintendent or his or her designee to develop and maintain procedures for the selection of a construction manager for each project for which the District determines that the employment of a construction managers is permitted and desirable. This procedure shall, at a minimum:

1. Extend consideration only to construction managers recognized as qualified by the Department of Real Estate Services of the Office of Management and Enterprise Services;
2. Evaluate the candidates' professional qualifications, including but not limited to, licensing, registration, certifications, technical abilities and past experience relevant to the contemplated project; and
3. Select a construction manager based on professional qualifications and technical experience.

Upon selection of a construction manager, the District shall negotiate a contract with the highest qualified construction manager, provided that a fee can be negotiated that is fair and reasonable to both parties. In the event a reasonable fee cannot be negotiated with the selected construction manager, the District may negotiate with other construction managers in order of their qualifications.

Reference: 61 O.S. § 62

SUBSTITUTE TEACHERS

The board of education employs substitute teachers to follow the daily lesson plan provided by a regular classroom teacher who is unable to be present in his/her class. Individuals wishing to perform duties as a substitute teacher must be annually approved by the board or be subsequently approved by the board for inclusion on the district's master list of substitute teachers. Only substitute teachers included on the district's approved substitute list will be employed by the district. All substitute teachers will be paid at the annual board approved substitute rate of pay.

Prior to employment with the district, a substitute teacher may be required to undergo a background check pursuant to the board's policy governing criminal records searches. General exceptions to the background check requirement relate to teachers of ten or more years who have retired from the district and individuals who have been full time Oklahoma teachers in the past five years at another district where a background check is already available.

The employment of an individual substitute teacher within the district shall be limited as follows:

- maximum of 135 days per school year if the substitute does not have a current or lapsed/expired teaching certificate or bachelor's degree, with a maximum of 135 days in the same assignment;
- maximum of 145 days if the substitute has a lapsed/expired certificate or possesses a bachelor's degree, with a maximum of 145 days in the same assignment; or
- no limit on the number of days within the district or in the same assignment if the substitute holds a valid certificate.

In the event the district is unable to locate a substitute teacher with a valid certificate to teach special education for students with physical disabilities or students with mental retardation, the limitations outlined above may be waived. Prior to waiving these restrictions, the administration will contact the Oklahoma State Board of Education and other local resources to determine the availability of a certified substitute teacher. Substitute teachers teaching special education for more than fifteen (15) consecutive or thirty (30) total days must receive in-service training prescribed by the Oklahoma State Board of Education.

Reference: 70 OKLA. STAT. § 6-105

DUPLICATE CHECKS

The district may issue a second or duplicate check in lieu of any check issued and subsequently lost or destroyed by the payee. No second or duplicate check will be issued until the district has stopped payment on the check by the payor bank or, in the alternative, until an affidavit explaining the circumstances regarding how the original check was lost or destroyed has been submitted to the district by the payee. The appropriate administrator may use his/her discretion in determining which alternative to use to preclude any district loss taking into account the district's past relationship with the payee, the amount of the original check, and other relevant factors.

Reference: 70 OKLA. STAT. §5-189

ELECTRONIC RECORDS, CONTRACTING AND SIGNATURES

Under certain conditions, electronic records and signatures satisfy the requirements of a written signature when transacting business. The District desires to promote effective and efficient use of electronic records to conduct business. The authenticity and reliability of electronic records and signatures relating to governmental transactions are dependent on the accompanying processes, supplemental records and the overall context in which records are created, transferred, signed and stored. The purpose of this policy is to provide guidelines for the use of electronic records and signatures in connection with the transaction of District business.

This policy does not mandate the use of an electronic signature or otherwise limit the right of a party to conduct a transaction on paper, nor does it apply to any situation where a written signature is required by law.

Definitions

1. **Attribution** - An electronic record or electronic signature is attributable to a person if it was the act of the person. The act of the person may be shown in any manner, including a showing of the efficacy of any security procedure applied to determine the person to whom the electronic record or electronic signature was attributable.
2. **Electronic Signature** - An electronic sound, symbol, or process attached to or logically associated with a record and executed or adopted by a person with the intent to sign the record.
3. **Electronic Record** - Any information created, generated, sent, communicated, received or stored by electronic means.

Guidelines

Electronic Records

Electronic records created or received by the District shall be appropriately attributed to the individual(s) responsible for their creation and/or authorization or approval. The District shall utilize available technology to implement reliable methods for generating and managing electronic records. Any electronic record filed with or issued by the District shall be given the full force and effect of a paper record if the following conditions are satisfied:

1. The record is an electronic filing or recording and the District agrees to accept or send such record electronically; and
2. If a signature is required on the record by any statute, rule or other applicable law or District policy, the electronic signature must conform to the

requirements set forth in this policy governing the use of electronic signatures. Signatures cannot be altered by ordinary means.

Electronic Signature

An electronic signature may be used unless there is a specific statute, regulation, rule of law or District policy that requires records to be signed in manual (i.e., non-electronic) form. The issuance and/or acceptance of an electronic signature by the District shall be permitted in accordance with the provisions of this policy and all applicable state and federal laws. Such electronic signature shall have the full force and effect of a manual signature only if the signature satisfies all of the following requirements:

1. The electronic signature identifies the individual signing the document by his/her name and title;
2. The identity of the individual signing with an electronic signature is capable of being validated through the use of an audit trail;
3. The electronic signature and the document to which it is affixed cannot be altered once the electronic signature has been affixed
4. The electronic signature must be electronically encrypted or transmitted by technological means designed to protect and prevent access, alteration, manipulation or use by any unauthorized person; and
5. The electronic signature conforms to all other provisions of this policy.

Authorized District Officers

The following positions are considered Authorized Officers/Employees:

Board of Education President
Board of Education Vice President
Board of Education Clerk
Board of Education Treasurer
Superintendent of Schools
Superintendent's Designee
Chief Financial Officer

Authorized Officers/Employees are the individuals delegated the authority to electronically sign documents on behalf of the District, where signatory authority has been granted for a specific transaction or purpose. **This policy is not intended to grant signatory authority to any person who does not have such authority by virtue of their position.**

Unless prohibited by law, Authorized Officers/Employees may, but are not required, to sign documents through an electronic signature on any record, including without limitation contracts, agreements, correspondence, certificates, reports, minutes or similar documents in those instances in which the Authorized Officer's/Employee's signature is required or permitted. Use of an electronic signature requires the approval of the Authorized Officer/Employee.

All electronic signatures are subject to the District's authentication procedures and Authorized Officers/Employees are required to comply with all security procedures established by the District and its software vendors.

Prohibited Use – All Employees and Officers

No employee or officer may use an electronic signature on any district document on behalf of any other employee or officer unless that person has been granted specific, written authorization to do so. Any unauthorized employee who uses electronic methods to sign documents, or falsifies electronic records or electronic signatures will be subject to disciplinary action up to and including dismissal. The District may also refer violations of this policy for possible criminal prosecution. All employees are required to immediately report any violations of this policy, suspected fraud, or other security concerns to the Superintendent.

Employment Applications, Contracts and related Paperwork

Any person applying for employment with the District or signing an employment contract with the District may be required by the District to electronically sign an employment application, contract of employment, or any other employment related paperwork. All electronic signatures are subject to the District's authentication procedures and applicants and employees are required to comply with all security procedures established by the District and its software vendors.

Reference: OKLA. STAT. tit. 12A, §§ 15-101 to 15-121.

**SPECIAL EDUCATION
CERTIFICATION REIMBURSEMENT**

Purpose

Pursuant to the Oklahoma State Department of Education Special Education Service Division's ("OSDE-SES") "Project 616," eligible teachers may apply for reimbursement for costs associated with obtaining certification in special-education related subject areas under certain circumstances. The purpose of this policy is to establish procedures by which eligible employees may seek such reimbursement.

Eligible Certifications

Teachers may seek reimbursement for the costs associated with the following subject area examinations:

- I. Eligible certifications for teachers who are currently certified in special education (mild-moderate or severe-profound):
 - a. Early Childhood Education (105)
 - b. Elementary Education Subtest 1: Reading/Language Arts (050) and Elementary Education Subtest 2: Social Studies/Mathematics/Science/Health, Fitness, and the Arts (051)
 - c. English (007) or English (107)
 - d. Middle Level English (024)
 - e. Advanced Mathematics (011) or Advance Mathematics (111)
 - f. Elementary Mathematics Specialist (082)
 - g. Middle Level/Intermediate Mathematics (025) or Middle Level/Intermediate Mathematics (125)
 - h. Chemistry (004)
 - i. Earth Science (008)
 - j. Middle Level Science (026)
 - k. Physical Science (013)
 - l. Physics (014)

- m. Middle Level Social Studies (027)
 - n. Psychology/Sociology (032)
 - o. U.S. History/Oklahoma History/Government/Economics (017)
 - p. World History/Geography (018)
 - q. Mild-Moderate Disabilities (029) or Mild-Moderate Disabilities (129)
 - r. Severe-Profound/Multiple Disabilities (031) or Severe-Profound/Multiple Disabilities (131)
 - s. Blind/Visual Impairment (028)
 - t. Deaf/Hard of Hearing (030)
2. Eligible certifications for general education teachers or participants in the Non-Traditional Route to Special Education Certification program:
- a. Mild-Moderate Disabilities (029) or Mild-Moderate Disabilities (129)
 - b. Severe-Profound/Multiple Disabilities (031) or Severe-Profound/Multiple Disabilities (131)
 - c. Blind/Visual Impairment (028)
 - d. Deaf/Hard of Hearing (030)

Procedures for Seeking Reimbursement of Qualified Expenses

To be eligible for certification reimbursement, an employee must first obtain the written approval of the Superintendent to make a request to the OSDE-SES for reimbursement.

Upon receipt of approval from the Superintendent, the employee is responsible for contacting OSDE-SES to obtain pre-approval for the reimbursement from OSDE-SES. The employee is required to provide OSDE-SES with a statement, on district letterhead, providing the following details:

- 1) Names the employee seeking reimbursement;
- 2) The employee's current teaching assignment;
- 3) An explanation of why the employee believes it is necessary for him/her to take and pass the subject area examination; and
- 4) Total cost.

The statement submitted to OSDE-SES must be submitted via e-mail one of OSDE-SES contacts listed below; the subject line of the employee's email submitting the statement to OSDE-SES should be "Project 616".

Upon submission of a request for pre-approval, OSDE-SES will notify the employee whether the request has been approved. Decisions by OSDE-SES regarding the approval of an employee's request for reimbursement are based on information provided and available funds for the program; approval of a request is not guaranteed.

If pre-approval is obtained from OSDE-SES, the employee must then take and pass the subject area examination before receiving the reimbursement. If an employee does not pass the test, he or she is not eligible for reimbursement, and must obtain pre-approval to take the test again pursuant to the procedure outlined above.

Upon receiving notification that an eligible employee has taken and passed the relevant subject area examination, the district's Special Education Director is responsible for preparing and submitting a computer-generated Expenditure Summary and Detail report and a copy of the employee's subject area examination results to request reimbursement from OSDE-SES. The district's report must be provided to OSDE-SES via facsimile at (405-522-2380) or emailed to the district's Compliance, Data, and Finance Specialist.

No employee may be reimbursed for obtaining a certification in more than one subject area pursuant to this policy. The amount of any reimbursement received under this program will be listed on the employee's W2 form as taxable compensation in the year in which the reimbursement was received by the employee.

Passing a subject area examination does not, in and of itself, constitute approval for providing direct instruction in any subject area. The district will comply with all applicable state law regarding certification requirements for teachers.

Employees who have questions regarding this program should feel free to contact OSDE-SES via the below contact information:

Special Education Services Division at 405-521-3351

carole.tomlin@sde.ok.gov (405) 521-2335

janet.felton@sde.ok.gov (405) 521-1578

karen.howard@sde.ok.gov (405) 521-3587

IDENTITY THEFT PREVENTION

This policy is adopted to ensure compliance with the Fair and Accurate Credit Transaction Act, 15 USC. §1601 et seq. and the Federal Trade Commission's rules regarding Identity Theft (the "Red Flag Rules"). The district is subject to the Red Flag rules if it is a "Creditor." The district is a Creditor if it provides any goods or services for a fee *and* as a matter of course extends credit to its customers by offering them the ability to pay for those goods and services *after* they are provided as opposed to requiring prepayment or contemporaneous payment. The district is a creditor with respect to limited areas involving a low risk of identity theft. Areas in which the district allows a debtor to defer payment owed the district include but are not limited to school meal charges, after school care charges, adult education tuition, facility use charges and similar accounts. The district must review all of its "Accounts" to determine whether any of those accounts are "Covered Accounts." As to "Covered Accounts," it must develop an Identity Theft Program (herein referred to as the "Program") designed to detect, prevent, and mitigate identity theft in connection with a Covered Account.

Definitions

For purposes of this policy, the following definitions apply.¹

"Account" means a continuing relationship established by a person with the district to obtain a product or service for personal, family, household, or business purposes. Note that the requirements of the federal rules apply not only to existing accounts but also to new account openings, when a relationship has not yet been established.

"District" means the Hilldale School District.

"Covered Account" pertains to accounts which involve prepayment or contemporaneous payment as well as payment in arrears and means (i) an account that the district offers or maintains, primarily for personal, family or household purposes, that involves or is designed to permit multiple payments or transactions, such as a child care account, cafeteria account, tuition account, or facility rental account and similar accounts; and (ii) any other account that the district offers or maintains for which there is a reasonably foreseeable risk to customers or to the safety and soundness of the district from identity theft, including financial, operational, compliance, reputation, or litigation risks. This category of Accounts includes the district's small business accounts, sole proprietorship accounts, and accounts for which the risk of identity theft is reasonably foreseeable because of how they are opened and accessed (i.e., the accounts can be accessed without face-to-face contact, such as through the Internet or by telephone).

¹ Other than district and "personal identifying information", definitions provided in this section are based upon the definitions provided in 16 C.F.R. § 681.1.

“Credit” means the right granted by the district to a debtor to defer payment of debt or to incur debts and defer its payment or to purchase property or services and defer payment therefore.

“Creditor” means a business or organization that regularly defers payment for goods or services or provides goods or services and bills customers later (as opposed to requiring prepayment or contemporaneous payment).

“Customer” means a person that has a covered account with the district.

“Identity Theft” means fraud committed or attempted using identifying information of another person without authority.

“Person” means a natural person, a corporation, government or governmental subdivision or agency, trust, estate, partnership, cooperative, or association.

“Personal Identifying Information” means a person’s credit card account information, debit card information, bank, bank account information, and driver’s license information and for a natural person includes the individual’s social security number, mother’s birth name, and date of birth.

“Red Flag” means a pattern, practice, or specific activity that indicates the possible existence of identity theft.

“Service Provider” means a person that provides a service directly to the district.

The district shall create an Identity Theft Program to protect Covered Accounts. At a minimum, the district’s Program will:

1. Identify and list the Covered Accounts.
2. Identify and list the red flags indicating that someone might be attempting to obtain services, products or information surreptitiously by claiming to be someone they are not.
3. Explain how the district will detect red flags that have been identified.
4. Explain how the district will respond if a red flag is detected.
5. Designate a senior administrative employee to administer the program.
6. Describe the district staff who need to be trained on how to detect and respond to identity theft and the training they should receive.
7. To ensure the protection of the district’s clients from identity theft via the district’s contracted service providers, identify the categories of service providers that should be required via contract to assist the district in detecting red flags and must therefore either have their own red flags program or ensure compliance with the district’s red flags program.
8. Identify how the district will periodically reassess its operations to ensure that its red flag program reflects the current risks of identity theft to its clients

(including, but not limited to, the types of records/accounts that are subject to the Red Flag Rules as Covered Accounts and the activities or occurrences that should be designated as a red flag for identity theft).

9. Be submitted to the district's board for approval.
10. Be annually re-evaluated to determine whether material changes have occurred warranting changes to the district's identity theft policy and program.

Updating the Program

Upon the recommendation of the superintendent the board of education shall annually review and, as deemed necessary by the board, update the district's identity theft prevention program along with any relevant red flags in order to reflect changes in risks to customers or to the safety and soundness of the district and its covered accounts from identity theft. In so doing, the board of education shall consider the following factors and exercise its discretion in amending the program:

1. The district's experiences with identity theft;
2. Updates and methods of identity theft;
3. Updates and customary methods used to detect, prevent, and mitigate identity theft;
4. Updates on the types of accounts that the district offers or maintains; and
5. Updates in service provider arrangements.

Reference: 15 U.S.C. 1601 et seq.

TELEPHONES

The board of education recognizes that telephone communications by staff and students are occasionally necessary. However, classes must not be interrupted for routine telephone calls.

1. Students or staff may be called from the classroom only for urgent or emergency telephone calls.
2. Personal telephone calls are discouraged; however, students may obtain permission from office personnel to use the office telephones for business use only during class breaks.
3. Incoming messages will be accepted and delivered during class breaks, if time permits.
4. Teaching staff may use office telephones, if necessary. Long-distance calls will not be made without permission from the principal. When personal long-distance calls are made, arrangements must be made to promptly reimburse the district for the cost.

TRANSPORTATION MANAGEMENT

The board of education recognizes that transportation is a necessary element of educational opportunity and, therefore, the board shall grant opportunities for transportation. Transportation is a privilege extended to students in the district only when necessary for the accomplishment of one of the following purposes:

1. To provide transportation for any child who is participating in pre-kindergarten, kindergarten or early childhood program operated by the school district or any Head Start program offered by the school district.
2. To transport children whose homes are more than a reasonable walking distance, as defined by regulations of the State Board of Education, from the school attended by such child. Transportation may be provided to children whose residence is within one and one-half miles of the school attended only within the limits of time, space and funds. Such transportation privileges shall be withdrawn if the board believes it to be in the best interest of the school district.
3. The board of education may provide transportation to students living outside the boundaries and routes established for the district by the State Board of Education.
4. To allow, when practicable, the use of school buses for the transportation of students to school activities and on field trips that have been approved by the superintendent.
5. To provide adequate education facilities and opportunities which otherwise would not be available.
6. To contract for the use of school buses and other school transportation for general public use including religious, political, literary, community, cultural, scientific, mechanical, agricultural or parental involvement purposes, and to make a reasonable charge to cover the cost of the use of school buses and other school transportation.

Reference: OKLA. STAT. tit. 70, § 9-105

SCHOOL BUS SAFETY PROGRAM

The safety and welfare of student riders will be the first consideration in matters pertaining to transportation. Children will be instructed as to the proper and safe conduct while aboard transportation vehicles. Emergency evacuation drills will be conducted regularly to acquaint students thoroughly with appropriate procedures for emergency situations.

All vehicles used to transport students will be maintained in a condition that will provide reasonably safe and efficient transportation service with a minimum of delay and disruption due to mechanical or equipment failure. Buses will be replaced as required to provide good equipment at all times.

Complete reports on any school bus accident should be filed in a timely manner. These reports should be brought to the attention of the board as soon as possible.

School bus drivers will always bring the bus to a full stop – with caution lights flashing – before loading or unloading passengers.

When unloading passengers, the driver will stay in place with caution lights on until the exiting passengers are at a safe distance away from the bus and/or clear of the street.

In furtherance of the District's School Bus Safety Program, the District may install and operate a video-monitoring system in or on its school buses or bus stop-arms for the purpose of recording a violation by a driver attempting to overtake a school bus with red loading signals in operation. See District policy "Use of Security Cameras."

Reference: OAC 210:35-13-115; OKLA. STAT. tit. 47 §11-705

STUDENT INTERVIEWS AND INTERROGATIONS

Should it become necessary for a member of a law enforcement agency or a social service agency to talk with a student and/or school personnel during the school day, the following procedures shall be observed to protect the rights of all parties involved.

In the event of an emergency which necessitates that law enforcement be contacted, law enforcement personnel may use whatever legal means are necessary to ensure the safety of all district students, patrons and employees.

In non-emergency situations, such as when law enforcement personnel wish to question a student or employee, law enforcement personnel must coordinate their business through the principal's office. The principal or designee is authorized to summon the student or employee to a private area so that law enforcement personnel may conduct a private interview. If the interview involves a minor student, district employees will attempt to contact the student's parent or guardian prior to the interview. However, the inability to reach the student's parent or guardian will not prevent the interview from being conducted. A school employee may remain present during the interview of a minor student to ensure compliance with the child's rights but may not participate in the interview. Students will not be removed from campus unless the student is being arrested or being placed in protective custody.

Child welfare workers wishing to interview minor students about suspected abuse or neglect must also coordinate their business through the principal's office. The principal or designee is authorized to summon the student to a private area so that the child welfare personnel may conduct a private interview. The principal or designee will ask the child welfare worker whether a parent/guardian may be contacted and/or whether a school official may be present for the interview, and school officials must comply with those instructions. Child welfare workers wishing to remove any student from school property must have a properly signed court order or be accompanied by local law enforcement for the removal of the child.

Reference: 10A OKLA. STAT. §1-2-105

CHILD NUTRITION INFORMATION FOR EMPLOYEES

The district participates in the USDA's child nutrition program, and all employees, even those not specifically connected with child nutrition services, are required to adhere to applicable standards and guidelines.

Staff Training and Employee Meals

The Assistant Superintendent is responsible for ensuring that all child nutrition workers have appropriate professional development and training opportunities to comply with USDA, health, safety, and sanitation requirements. The Assistant Superintendent will also provide a copy of this policy to all employees who are responsible for complying with this policy. Although they are not specifically responsible for enforcing the policy, school social workers, counselors, nurses, homeless liaison, etc. will also receive a copy of this policy.

The district operates on a commodity program and is prohibited from providing any unpaid meals to employees.

Charging Meals

No adult, including a school employee, may charge a meal at school.

Collections

Only employees authorized by the Assistant Superintendent are permitted to have contact with parents regarding delinquent accounts.

Recordkeeping

The Assistant Superintendent will maintain all district records related to applications for free/reduced price meals.

The Superintendent and Assistant Superintendent will maintain records of distribution of this policy.

The Assistant Superintendent will retain evidence of the efforts made to collect unpaid meal charges, including evidence that the collection efforts were timely and in accordance with the district's family policy.

The Assistant Superintendent will maintain the financial documentation showing when the delinquent charges were reclassified as bad debt (operating loss) and how the funds were restored using non-federal sources.

CHILD NUTRITION INFORMATION FOR FAMILIES

All district students may, but are not required to, participate in any or all of the district's child nutrition program services. The district participates in the following USDA child nutrition programs:

- National School Lunch Program (NSLP)
- School Breakfast Program (SBP)
- Fresh Fruit & Vegetable Program (FFVP)

Although the district complies with all USDA child nutrition program requirements, this policy is designed to provide families with pertinent information regarding meals at schools. Any individual who wishes to obtain more detailed information about the district's programs may contact the Assistant Superintendent.

Cafeteria Use

Except under special circumstances¹ all students will eat in the cafeteria or other designated location.

Guests must be cleared by the building principal prior to joining a student in the cafeteria. Non-district individuals or groups who wish to use the cafeteria must also be cleared by the building principal.

Meal Costs

The Superintendent will establish the cost for meals prior to the beginning of each school year. Meal costs will be widely publicized and posted in the cafeteria.

Meal Payments

Students are encouraged to pre-pay for meals to ensure quicker checkout in the cafeteria and to reduce the likelihood of forgotten or lost lunch money. Students may pre-purchase meals online at the District's website.

The district provides several options to keep parents informed of their student's meal account balance. The district will send a notice to parents when a child's account balance is \$5.00 or less.

¹ Special circumstances include, but are not limited to, lunch detention, severe food allergies, and IEP requirements. The district will not separate students during meals based on a student's ability to pay.

Parents may also check their child's account balance online through the parent information system.

Free and Reduced-Price Meals

All families will have the opportunity to submit an application for free and/or reduced priced meals. This application must be completed each year. The district will utilize federal guidelines in determining eligibility for free and/or reduced-price meals, and those guidelines will be publicized with other notices regarding the district's child nutrition program. The Assistant Superintendent is responsible for reviewing applications and determining eligibility. The Assistant Superintendent is responsible for promptly notifying families whether their application has been approved and following up with families who have submitted incomplete applications.

Any family who wishes to appeal a decision regarding their eligibility may make an appeal to the board clerk. If an appeal is filed, the individual will be notified of the date and time for an appeal hearing. Individuals may bring a representative with them to any appeal hearing.

School personnel will use discretion in handling applications, and the names of students eligible for free/reduced price meals will not be published, posted, announced, etc. Students receiving free/reduced price meals will not:

- Use a separate cafeteria or area of the cafeteria
- Use a separate serving line
- Enter the cafeteria through a different entrance
- Eat meals at a different time
- Work for their meals
- Use a different method at the checkout
- Eat a different meal

Charging Meals

Students in grades Pre-K through 12 who do not qualify for free meals may charge a maximum of three (3) meals at school prior to May 1st. No charges will be permitted after May 1st. All meals which are charged will be reimbursable meals.

Students who have exceeded the charge limit and students who are without lunch funds after May 1st will receive up to three (3) alternate meals if they do not have money to pay for their meals. The cost of these meals will be added to the family's delinquent account balance. A schedule of these meal prices will be posted in the cafeteria with other prices.

The alternate meal will be presented to the student as a low-cost reimbursable entrée regularly included on the menu.

Collecting Debt

The district must work to ensure that its child nutrition services are run in a fiscally responsible manner. Families will be notified when their child's account balance is

low so that the account can be replenished. If a child's account has a negative balance, the following steps will be taken:

1. An initial notice of delinquent account, along with another copy of this policy, will be sent home with the student in a plain envelope once the student's balance is negative. Up to two (2) additional weekly notices may be sent in this manner. If the Assistant Superintendent is aware of community resources which may be available to families in need of financial assistance, the Assistant Superintendent may include information regarding those resources with the notice.
2. The Assistant Superintendent will attempt to contact families via phone, email, or through other personal contact if their account is still delinquent after three (3) notices. The Assistant Superintendent is authorized to enter into a repayment plan with the family at the Assistant Superintendent's discretion.
3. If the account remains delinquent despite these efforts to collect the debt, the Assistant Superintendent will assess the situation to determine whether the account should be referred to an outside collection agency. The Assistant Superintendent is also responsible for determining whether the debt should be reclassified as bad debt and how the funds will be restored to the child nutrition program.

Policy Distribution

This policy will be widely circulated in the community prior to the start of each school year and will promptly be provided to families who join the district after the start of the school year. The superintendent has discretion in determining appropriate distribution methods, but the board expects the distribution to occur through as many of the following methods as deemed practical:

- District's website
- Student handbooks
- Local newspaper
- Community welfare organizations
- Parent emails/newsletters
- Back to school night
- Enrollment paperwork and at the beginning of the school year

IMMUNIZATIONS

The board of education shall provide an environment for students to study, interact, and learn. Such an environment shall be reasonably free of known hazards that may threaten or endanger the health of our children or educators.

The board of education shall require that no child be admitted to this school district unless and until the student's parent/guardian provides (1) a current, up-to-date immunization record **OR** (2) a completed and signed state-approved exemption form. Either the up-to-date immunization record or a completed and signed state-approved exemption form must be on file with the district **prior** to the student's admission to the district. The exemption form shall specify that the student has received or is in the process of receiving the immunizations currently required by Oklahoma State Department of Health regulations, unless the exemption has been granted from the immunizations on medical, religious, or personal grounds or as otherwise required by law.

The immunization requirements shall be posted at the district's website **and** in any notice or publication provided to parents/guardians regarding immunizations. The state-approved exemption form is available at the Oklahoma State Department of Health website: <https://oklahoma.gov/health.html>.

If a parent or guardian is unable to pay for the required immunizations, the school will refer the student to the State Department of Health for assistance.

Reference: OKLA. STAT. tit. 70 §1210.191, OKLA. STAT. tit. 70 §1210.192; O.A.C. 310:535-1-2

COMMUNICABLE DISEASES

Many communicable diseases, including Human Immunodeficiency Virus (HIV) and/or Acquired Immune Deficiency Syndrome (AIDS), require special consideration in the school environment. The board of education seeks to provide an environment which is safe for all students and employees, while maintaining the dignity and privacy of individuals infected with communicable diseases.

Current research indicates that the risk of transmitting HIV/AIDS and other communicable diseases is low in the school setting when appropriate procedures are followed. All school employees are required to follow the district's Bloodborne Pathogen Exposure Control Plan at all times when there is a potential for exposure to any bodily fluid. Parents/guardians will be notified in the event a minor student has been exposed to a potentially infectious agent.

Information regarding an individual's communicable disease status will be maintained in a separate confidential file and will only be disclosed:

- in compliance with Oklahoma law; or
- with the express approval of the superintendent.

Information about an individual's communicable disease status will not be included in the individual's regular school or health records. Any individual who discloses another person's communicable disease status without the superintendent's express authorization will face disciplinary action.

Communicable Diseases for Which Isolation or Quarantine is Required

No student having a communicable disease, requiring a period of isolation or quarantine, shall enter or remain at a district school site. This shall be in effect until the order for quarantine or isolation has expired or permission for entry and return to the school site and activities has been given by the local county health department or State Department of Health. It shall be the responsibility of the student's parent(s) or legal guardians and District administration—not the student's teacher—to exclude the student. In the event a student known to be infected arrives at a school site or, after their arrival, is discovered to be infected—a school site administrator shall discretely remove the student from the class or activity, place the student in a monitored room where the student will not come into close contact with non-infected persons, and contact the student's parent or legal guardian to make arrangements to send the student home.

Student Admission

No student will be denied an education or participation in the activities of the district-based solely on his/her status as a student infected with a communicable disease. In the event the school administration learns that a student may have a communicable disease, the superintendent or designee will consult with the Oklahoma State Department of Health regarding an appropriate educational environment for the student. All decisions regarding an

appropriate educational setting for the student will be made on a case-by-case basis following established policies and procedures for students with chronic health problems or other disabilities. The placement decision will be periodically reviewed, and will also be reviewed at any time a staff member observes behavior which might pose a reasonable risk of transmitting the communicable disease.

Employment

No individual will be denied employment or have his/her contract nonrenewed based solely on his/her status as an individual infected with a communicable disease.

Reference: OKLA. STAT. tit. 63, § 1-507 (2021)

CONTAGIOUS HEALTH CONDITIONS

The district is committed to providing a safe and healthy environment for all students and employees. School administrators will enforce this policy for the benefit of all members of the school community but will attempt to avoid embarrassment to an affected individual as practical given the totality of the circumstances. Students and employees with unique health circumstances may request an exception to this policy by providing a statement from a physician certifying that there is no danger of the condition spreading to others in the school environment. The district will comply with physician instructions when implementing the requirements of this policy.

Any student or employee who is determined to be afflicted with a contagious health condition such as head lice or bed bugs—in all stages/forms of life—shall be prohibited from attending school until a health officer (licensed physician, licensed physician’s assistant, health department official, school nurse, etc.) has determined that the individual is free of the condition or that there is no danger of the condition spreading to others in the school environment.

Students and employees who have had a fever, diarrhea or vomiting must be symptom free for 24 hours, without the use of symptom reducing medication, prior to returning to school.

Students and employees who have pink eye or another eye infection must be symptom free or consult with the school nurse or provide a physician’s statement prior to returning to school.

WELLNESS

A significant amount of research exists showing the important roles nutrition and physical health play in student learning. To increase the likelihood for students to achieve their full academic potential, the district is committed to promoting health and wellness in all its school sites. This policy outlines the district's goals and procedures to ensure:

- Students have access to healthy foods at school in accordance with federal and state nutrition standards
- Students receive quality nutrition education to help them develop lifelong healthy eating behaviors
- Students have opportunities to be physically active before, during, and after school
- Individual school sites promote nutrition, physical activity and other behaviors which encourage wellness
- The community is welcome in the district's wellness program
- The smooth operation of the district's wellness program

The board encourages staff to engage in healthy eating and appropriate physical activity since staff members serve as role models for district students.

District Wellness Committee Membership and Leadership

The district's wellness program will be coordinated by Assistant Superintendent. The Assistant Superintendent will annually designate one (1) individual at each school site to be a site level liaison for the district's program and will publicize this information on the district's website, in school newsletters and by other means as he/she determines appropriate. Individual sites will publicize the name and contact information for their site liaison in school newsletters, as a part of routine parent updates, and through other appropriate methods.

Although the district's wellness program is coordinated by the Assistant Superintendent, the program will be based on the work of the district's wellness committee. The committee will meet once each quarter during the school year for the purpose of reviewing existing wellness activities, brainstorming new activities, reviewing and assessing the district's wellness policies and procedures, and related actions.

Membership in the committee will be open to interested parents, students, health care providers, social service workers and school representatives. The committee will include, minimally, the child nutrition director, a PE teacher, a school administrator and all site liaisons.

A staff subcommittee comprised of Assistant Superintendent, a human resources representative, a teacher representative and an administrator will focus on staff development. The subcommittee will meet once per semester and will focus on providing wellness resources and strategies to teachers. The subcommittee will make recommendations regarding professional development related to health, wellness, integrating kinesthetic learning and the overall connection between wellness and learning.

Assessment, Planning and Reporting

The Assistant Superintendent is responsible for conducting a district assessment using tools available through the Centers for Disease Control. Once the assessment is completed, the committee will develop and maintain a plan to implement and manage the district's wellness program. The district's plan will be specific for each site (although the site plans may be substantially similar) and delineate the roles, responsibilities, actions and timelines for wellness activities. It will also include specific goals and objectives for nutrition standards for all foods and beverages available on campus, outside food/beverage marketing, nutrition promotion and education, physical activity and education and other wellness activities. The plan will be regularly assessed, reviewed and updated in light of district needs, emerging research and to ensure compliance with the latest local, state and federal standards.

The site liaison will annually prepare progress reports on the implementation and progress of the plan at his/her site (including the activities conducted), and the Assistant Superintendent will annually present a synopsis of this information to the board.

The Assistant Superintendent will also prepare a triennial progress assessment for the board. This assessment will include information such as the extent to which individual schools are in compliance with the policy, how the district's program compares with federal standards and a description of the overall progress in attaining the district's goals.

A copy of all assessments, plans and progress reports will be available through the Assistant Superintendent. The Assistant Superintendent will also maintain documentation demonstrating efforts to involve non-employees in the committee, minutes from the committee meetings, notes regarding wellness activities conducted, and information regarding how this information was made available to families and community members.

Open Communication

The Assistant Superintendent and site liaisons are expected to make an effort to involve all district families and interested community members in the district's wellness initiatives. This also includes providing parents with information regarding health and wellness, the district's policy and plan, activities, involvement opportunities, school meal standards and available child nutrition programs. This information will be communicated through a variety of methods, including publication in newsletters and on the website, at enrollment, back to school nights and similar activities.

School Meals

The district participates in the following USDA child nutrition programs:

- National School Lunch Program (NSLP)

- School Breakfast Program (SBP)
- Fresh Fruit & Vegetable Program (FFVP)

Participation in these programs is designed to ensure students receive plenty of fruits, vegetables, whole grains, and fat-free/low-fat milk to meet their nutrition needs. School meals are also calorically appropriate, moderate in sodium, low in saturated fat and have zero grams of trans fat.

Goals of the district's meal program include:

- Improving overall health
- Mitigating childhood obesity
- Modeling healthy eating in support of lifelong eating patterns
- Accommodating cultural food preference and special dietary needs

School meals:

- Are accessible to all students
- Are appealing and attractive to children
- Are served in clean and pleasant settings
- Meet or exceed current nutrition requirements established by local, state, and federal statutes and regulations
- Promote healthy food and beverage choices by:
 - Displaying daily fruit options in students' line of sight/reach
 - Creatively naming vegetable options
 - Training servers to politely prompt students to select and consume the daily vegetable options with their meal
 - Placing white milk in front of other beverages in all coolers
 - Highlighting alternative entrée options (e.g., salad bar, yogurt parfaits, etc.) on signs within all service / dining areas
 - Creating a reimbursable meal in all service areas (e.g., salad bars, snack rooms, etc.)
 - Using student surveys and taste testing opportunities to inform menu development, dining space decor, and promotional ideas
 - Displaying student artwork in the service and/or dining areas
 - Marketing menu options through daily announcements

Qualifications and Training

All school nutrition employees will meet or exceed USDA hiring and annual continuing education/training requirements.

Water

To promote hydration, free, safe, unflavored drinking water will be available to all students throughout the school day, including during mealtimes. Students may also bring and carry approved water bottles – filled only with water – throughout the day.

Competitive Foods and Beverages

Foods and beverages sold or offered apart from the school meal programs (competitive items) will, at a minimum, meet the USDA Smart Snacks in School standards.

Competitive items at celebrations and parties are not required to meet USDA Smart Snacks in School standards, although the site principal is responsible for annually disseminating healthy and non-food party ideas to teachers, who will provide this information to parents who are bringing classroom snacks.

No food or beverage will be used as a reward or withheld as a punishment, unless specified in a qualified student's IEP.

Fundraising

Competitive items may be sold during the school day as a fundraiser as long as those items meet USDA Smart Snacks in School standards.

Site Principals will annually provide staff and PTA representatives a list of healthy fundraising ideas.

Health and Nutrition Education

Good nutrition will be encouraged throughout the school day using evidence-based techniques, including creative marketing for nutritious food choices. This will create a food environment which encourages healthy eating and participation in school meal programs. Wellness committee employees and child nutrition workers will regularly consult federal and state resources for current tips and resources to implement these requirements.

The district's nutrition education will:

- Provide knowledge and skills so students can protect their health
- Be integrated across disciplines
- Be enjoyable, developmentally appropriate, and culturally relevant
- Promote nutritious foods and preparation methods
- Emphasize caloric balance (promote exercise)
- Coordinate with school meal and other relevant programs
- Teach media literacy related to food/beverage marketing

The district's health education curriculum will include:

- The relationship between eating, personal health and disease
- Food guidance from MyPlate
- Reading and using USDA's food labels
- Eating a variety of foods every day
- Balancing food intake and physical activity
- Eating more fruits, vegetables, and whole grain products
- Choosing foods that are low in fat, saturated fat, and cholesterol and do not contain *trans* fat
- Choosing foods and beverages with little added sugars
- Eating more calcium-rich foods
- Preparing healthy meals and snacks

- Risks of unhealthy weight control practices
- Accepting body size differences
- Food safety
- Importance of water consumption
- Importance of eating breakfast
- Making healthy choices when eating at restaurants
- Eating disorders
- The Dietary Guidelines for Americans
- Reducing sodium intake
- Social influences on eating, including media, family, peers, and culture
- How to find valid nutrition and dietary information
- How to develop a plan and track progress toward achieving a personal goal to eat healthfully
- Resisting peer pressure related to unhealthy dietary behavior
- Influencing, supporting, or advocating for others' healthy behavior

Advertising

In order to provide a consistent message for students, only those foods and beverages which meet USDE Smart Snacks in School standards may advertise on district property. This includes:

- Brand names, trademarks, logos or tags, except when placed on a physically present food or beverage product or its container
- Displays, such as on vending machine exteriors
- Corporate brand, logo, name, or trademark on school equipment, such as marquees, message boards, scoreboards, or backboards (Note: the district will not immediately replace existing items, but will not accept or allow new items which violate this policy)
- Corporate brand, logo, name, or trademark on cups, menu boards, coolers, trash cans, and other food service equipment; as well as on posters, book covers, assignment books, or school supplies displayed, distributed, offered, or sold by the district
- Advertisements in school publications or mailings
- Free product samples, taste tests, or coupons of a product, or free samples displaying advertising of a product

Physical Activity

All schools will make a variety of physical activity available throughout the school day and will also seek opportunities to provide afterschool physical activities. The district's physical activities include PE classes, recess, classroom based physical activity and afterschool activities. Physical activity, including recess, will not be withheld as a punishment. This does not include participation in extracurricular activities which are privilege based. The district will maintain safe and appropriate grounds and facilities to promote active students.

Physical Education Classes

All district students, except those excused due to medical necessity, will participate in age-appropriate, sequential PE classes as required by state and federal curriculum standards. Students will also participate in state and/or federal assessments which promote fitness.

Health Education – Physical Activity

The following topics will be included in the district’s health education curriculum:

- The physical, psychological, or social benefits of physical activity
- How physical activity can contribute to a healthy weight
- How physical activity can contribute to the academic learning process
- How an inactive lifestyle contributes to chronic disease
- Health-related fitness (cardiovascular endurance, muscular endurance, muscular strength, flexibility, and body composition)
- Differences between physical activity, exercise, and fitness
- Phases of an exercise session (warm up, workout, and cool down)
- Overcoming barriers to physical activity
- Decreasing sedentary activities, such as TV watching
- Opportunities for physical activity in the community
- Preventing injury during physical activity
- Weather-related safety (e.g., avoiding heat stroke, hypothermia, and sunburn while being physically active)
- How much physical activity is enough (determining frequency, intensity, time, and type of physical activity)
- Developing an individualized physical activity and fitness plan
- Monitoring progress toward reaching physical activity plan goals
- Dangers of using performance-enhancing drugs, such as steroids
- Social influences on physical activity (media, family, peers, culture)
- How to find valid fitness information or services
- How to influence, support, or advocate for others’ physical activity
- How to resist peer pressure that discourages physical activity

Recess (Elementary School Students)

All elementary sites will offer at least twenty (20) minutes of recess every school day, except when early dismissal or similar scheduling requirements make this impractical. Recess is separate from PE classes.

Time for hand washing, putting away coats, etc. will be built into recess transition periods to ensure students have adequate time for both recess and eating. For classes who participate in recess prior to lunch, adequate hand washing facilities will be readily available to ensure proper hygiene prior to eating.

Recess will be outside unless weather or other emergency conditions make this inadvisable. If recess is conducted inside, efforts will be made to promote physical activity during recess. This includes activities such as shared gymnasium time, walking in the hallways, classroom physical activity videos.

Recess monitors will encourage students to be active and will serve as role models by being physically active alongside students when practical.

Physical Activity in the Classroom

To increase attention to learning and to promote wellness, all students will be provided with brief, periodic activity breaks for stretching. Movement and kinesthetic learning will be routinely incorporated into lessons for all subjects.

Before and After School Activities

The district's before school program will provide opportunities for students to engage in physical activity.

Active Transport

The district supports active transport to and from school, such as walking or biking. The administration will encourage this behavior by:

- Designating preferred routes to school
- Promoting activities such as International Walk to School Week, National Walk and Bike to School Week
- Providing secure storage facilities for bicycles and helmets
- Providing instruction on walking/bicycling safety
- Promoting safe route programs to students, staff, and parents via newsletters, websites, local newspaper

Other Activities to Promote Wellness

The district's wellness approach will be integrated across the entire school setting, including all school sponsored events.

The Assistant Superintendent will coordinate all efforts to obtain recognition, grants or other funds to promote the district's wellness program.

All school-sponsored wellness events will include physical activity opportunities. The district will also seek opportunities to partner with the community in support of this program. The Assistant Superintendent is responsible for evaluating proposed partnerships, sponsors and activities to ensure that they comply with the district's wellness objectives.

SMOKING, VAPING, AND THE USE OF TOBACCO PRODUCTS

The board is dedicated to providing a healthy, comfortable, and productive environment for staff, students, and citizens. The board believes that education has a central role in establishing patterns of behavior related to good health and that measures are necessary to help its students to resist tobacco use. The board is concerned about the health of its employees and also recognizes the importance of adult role-modeling for students during formative years. Therefore, the board shall discourage the use of tobacco products by its staff and students. The district will refer employees, parents/guardians, family members, and students (13 and older) interested in quitting tobacco use to the Oklahoma Tobacco Helpline and other available cessation resources.

Tobacco on Campus

Smoking and the use of tobacco products or vapor products in any form is prohibited on district property by all persons. This prohibition includes school buildings, grounds, and school-owned vehicles. Possession of tobacco products or vapor products by students on school property is prohibited.

Marijuana on Campus

Smoking, vaping, or possessing marijuana (as defined in Board of Education Policy, *Medical Marijuana, Hemp & Cannabidiol (CBD)*) on District property is strictly prohibited. Refer to the District's policy on *Medical Marijuana, Hemp & Cannabidiol (CBD)* for further information.

Posting Signs Pursuant to this Policy

At or near each entrance of every district building the following sign shall be conspicuously posted: Tobacco or Marijuana Smoking or Marijuana Vaping is Prohibited.

Definitions

“Tobacco products” includes, but is not limited to: cigarettes, cigars, loose tobacco, rolling papers, chewing tobacco, snuff, matches, and lighters.

“Vapor product” includes noncombustible products that may or may not contain nicotine, that employ a mechanical heating element, battery, electronic circuit or other mechanism, regardless of shape or size, that can be used to produce a vapor in a solution or other form. “Vapor product” shall also include any vapor cartridge or other container with or without nicotine or other form that is intended to be used with an electronic cigarette, electronic cigar, electronic cigarillo, electronic pipe or similar product or device and any vapor cartridge or other container of a solution, that may or may not contain nicotine, that is intended to be used with or in an electronic cigarette, electronic cigar, electronic cigarillo or electronic device. “Vapor product” does not include any products regulated by the United States Food and Drug Administration under Chapter V of the Food, Drug and Cosmetic Act

“Smoking” means the carrying by a person or having access to a lighted cigar, cigarette, pipe or other lighted smoking article. Smoking also includes using products which mimic or simulate smoking behavior, regardless of whether such products actually contain tobacco. This prohibition includes but is not limited to vapor products as defined in this policy.

Enforcement

The success of this policy will depend upon the thoughtfulness, consideration, and cooperation of smokers and non-smokers. All individuals on school premises share in the responsibility for adhering to and enforcing this policy. Any individual who observes a violation on school property may report it in accordance with the procedures listed below.

Students

Any student using, possessing or distributing tobacco products or vapor products in violation of this policy will be subject to appropriate disciplinary measures, including out-of-school suspension, pursuant to the board’s policies regarding student discipline.

Staff

Any violation of this policy by staff will be referred to the appropriate supervisor. One written warning will be issued to the staff member with a copy placed in his or her district personnel file. Further violations will be considered willful neglect of duty and will be dealt with accordingly based on established policies and procedures for suspension, demotion, dismissal and non-renewal of staff.

Citizens

Citizens who are observed smoking or using tobacco products or vapor products on district property in violation of this policy will be asked to refrain from using these products on school property. If the individual fails to comply with the request, his or her violation of policy may be referred to the building principal or other district supervisory personnel responsible for the area or program during which the violation occurred. The supervisor shall make a decision on further action which may include a directive to leave school property. Repeated violations may result in a recommendation to the superintendent or board of education to prohibit the individual from entering district property for a specified period of time. If deemed necessary by the school administration or the board of education, local law enforcement officials may be called upon to assist with enforcement of this policy.

Reference: 70 O.S. §§ 1210.212, 1210.213

CUSTODIAL AND NONCUSTODIAL PARENTAL RIGHTS

It is the policy of the board of education that a parent who is awarded legal custody of a child by court action shall file a copy of the court decree awarding such custody with the school. If the custodial parent does not wish the child to be released to the noncustodial parent, an appropriate written instruction should also be filed with the school.

All staff members are instructed to refer any questions to the appropriate building principal or the superintendent.

Absent a court order to the contrary, both natural parents have the right to view the student's school records; to receive school progress reports; to visit the child briefly at school; and to participate in parent and teacher conferences (not necessarily together in the same conference).

Reference: 43 OKLA. STAT. §109-6

SCHOOL VOLUNTEERS

The board encourages community members to volunteer at the district's schools to augment its programs. The board has adopted this policy to clarify requirements, expectations and responsibilities related to volunteering for the school district.

The district does not discriminate against volunteers on the basis of race, color, sex, pregnancy, gender, gender expression or identity, national origin, religion, disability, veteran status, sexual orientation, age, or genetic information. All individuals who volunteer for the district should be committed to the district's non-discrimination requirements and its goal of providing quality education and related programs to the children of the community.

The district has a myriad of needs which can be filled by volunteers, and any individual interested in being a school volunteer should contact the Assistant Superintendent to begin the volunteer approval process. Prior to volunteering, all volunteers are required to:

- submit an information form
- authorize a criminal records check
- pay the records check fee (fee may be waived in cases of demonstrated financial hardship)
- review relevant school policies
- sign the volunteer compliance agreement

No individual will be permitted to volunteer until all of the required paperwork has been submitted and the criminal records check has been reviewed and approved by the Superintendent. In the event the criminal records check reveals adverse information regarding the potential volunteer, the administration will review the facts and circumstances to determine whether an exception can be granted and in what capacity, if any, the individual may be permitted to volunteer. All potential volunteers will be given the opportunity to explain any adverse information which is discovered during the criminal records check prior to an application being denied.

In addition to the foregoing, there are also special considerations for volunteers who are driving on school field trips or who are volunteering in connection with athletic events. Individuals who transport students in personal vehicles are required to provide additional documentation and declarations related to their driving history and insurance. Individuals who volunteer in connection with athletic events are required to participate in sport-specific education programs.

DISTRICT-WIDE PARENTAL INVOLVEMENT
(Parents' Bill of Rights)

The board supports parents' efforts to be involved in the district's education programs. This policy outlines the district's efforts to educate parents and support parent involvement in response to the 2014 Parents' Bill of Rights.

Parents have the right be involved in their minor child's education, including directing that education. Parents are encouraged to exercise their rights in conjunction with district guidance so as not to inadvertently impede their minor child's compliance with federal and state mandated requirements – including requirements related to graduation. Parents also have the right to review school records related to their minor child.

Pursuant to the 2023 Oklahoma "Parents' Bill of Rights" (OAC 210: 10-2-3) no district employee and no Independent Contractor shall encourage, coerce, or attempt to encourage or coerce a minor child to withhold information from the child's parent or guardian. The district shall disclose to the child's parent or guardian any information known to the district or its employees or an Independent Contractor regarding material changes reasonably expected to be important to a parent or guardian regarding their child's health, social or psychological development, including identity information. Such disclosures shall occur within 30 days of learning the information and may include referrals for appropriate counseling services. Any parent or guardian alleging a violation by the district of OAC 210: 10-2-3 shall provide a written complaint to the State Department of Education. Any violation by an Independent Contractor that the district knew or should have known about shall be attributed to the district responsible for the contract.

"Independent Contractor" means an individual, organization, or entity that is engaged by and/or contracted by the district to provide services or instruction, whether directly or indirectly, to students or within the district on a temporary contractual basis and is not an employee of the district.

Parents generally have the right to consent prior to an audio or video recording being made of their minor child. This right does not preempt the district's right to make recordings (without specific parental approval) related to:

- safety, general order and discipline
- academic or extracurricular activities
- classroom instruction
- security/surveillance of the buildings or grounds
- photo ID cards

Parents have the right to receive prompt notice if their minor child is believed to be the victim of a crime perpetrated by someone other than the parent, unless law enforcement or DHS officials have determined that parental notification would impede the related investigation. These notice provisions do not apply to matters which involve routine

misconduct typically addressed through student discipline procedures. School personnel will not attempt to encourage or coerce a child to withhold information from parents.

1. The district will promote parent participation at the site level with the goal of improving parent and teacher cooperation in areas such as homework, attendance and discipline. This will be accomplished through activities such as:
 - Parent teacher conferences
 - Back to school / meet the teacher nights
 - District sponsored webpages with class information available to parents
 - School newsletters

2. The district will inform parents about their children's course of study by disseminating this information:
 - During annual enrollment
 - In student handbooks
 - On the district's webpage

Parents may review learning materials affecting their minor children's course of study, including supplemental materials, by making a request through the building principal.

3. Parents who object to a learning material or activity may withdraw their minor child from the class or program in which the material is used. In order to withdraw a student, the parent must submit a written request, signed and dated by a parent, to the building principal. Parents who choose to withdraw their minor child from a required class are responsible for making alternate arrangements for the child to earn credit for the class.
4. The district offers sex education in grades 5, 8 and 11. Parents who object to their minor child participating in the district's sex education program must submit a written notice, signed and dated by a parent, to the principal in order for their child to be excused from participation. Pursuant to the 2023 Oklahoma "Parents' Bill of Rights" (OAC 210: 10-2-1, et seq.) sex or sexuality education means any class, program, curriculum, instruction, test, survey, questionnaire, course, or other instructional material that relates to sexual behavior, sexual attitudes, or sexuality, including but not limited to gender identity or sexual orientation. A written objection from a parent/guardian may object to sex or sexuality education or any other instruction questioning beliefs or practices in sex, morality, or religion. Students who are not participating in the district's sex education program will be permitted to study in the school library or office during sex education instruction.
5. If a teacher is going to provide instruction or presentations regarding sexuality in a course apart from formal sex education, the teacher will send written notice home to parents five (5) days in advance of the presentation. Parents who object to their minor child's participation in such instruction may send a written request to the building principal to have the student excused from the presentation. Any such student will be permitted to study in the school library or office during the presentation.

6. Parents may learn about the nature and purpose of clubs and activities which are part of the school curriculum by reviewing student handbooks and the district's website. The district's extracurricular clubs and activities are also published in student handbooks, the district's policy manual, and are available on the district's website.
7. Parents have numerous rights and decision-making responsibilities concerning their minor children. To assist parents in meeting these responsibilities and to fulfill its obligations under the 2014 Parent Bill of Rights, the district has compiled the following information for parents:
 - A. The district provides sex education to students in grades 5, 8 and 11. Parents may opt their student out of the district's sponsored sex education program by following the procedures established in item 4 above.
 - B. Parents who are not residents of the district may enroll their minor children in the district's schools in accordance with the district's open transfer policy. A copy of that policy is available in the superintendent's office.
 - C. The district utilizes a number of resources to educate students. Parents who object to an assignment based on sex, morality or religion may opt their minor child out of the assignment by following the procedures established in item 3 above.
 - D. A minor student is required to have (1) a current, up-to-date immunization record OR (2) a completed and signed state-approved exemption form. Either the up-to-date immunization record or a completed and signed state-approved exemption form must be on file with the district **prior** to the student's admission to the district. The exemption form shall specify that the student has received or is in the process of receiving the immunizations currently required by Oklahoma State Department of Health regulations, unless the exemption has been granted from the immunizations on medical, religious, or personal grounds or as otherwise required by law.

The immunization requirements shall be posted at the district's website and in any notice or publication provided to parents/guardians regarding immunizations. The state-approved exemption form is available at the Oklahoma State Department of Health website, URL:

<https://oklahoma.gov/health.html>
 - E. Students are required to meet certain obligations in order to graduate from high school. Parents can learn about these requirements each year during course enrollment. This information is also available in student handbooks and on the Oklahoma State Department of Education's website (www.ok.gov/sde/).
 - F. The district provides AIDS education for students in grades 8 and 11. Parents may opt their minor student out of this education by submitting a written request, signed and dated by a parent, to the building principal. Students who are not participating in the district's AIDS education program will be permitted to study in the school library or office during the scheduled instruction.

- G. Parents have the right to review student test results related to their minor student. Parents may review the results of classroom exams by contacting their child's teacher. Parents may review the results of state-wide testing by contacting their child's building principal.
- H. Qualifying students have the right to participate in the district's gifted and talented program in accordance with the district's policy regarding the program. A copy of the policy is available through the superintendent's office.
- I. Parents have the right to review teachers' manuals, films, tapes or other supplementary instructional material if the materials are being used in connection with a research or experimentation program or project. In order to review these materials, the parent should contact the building principal.
- J. Parents have the right to receive a school report card. Information regarding these report cards will be provided through school publications, but a copy of the actual report card is available in the superintendent's office.
- K. Students are required to attend school regularly, and the district is required to notify parents of any student absence unless the parent has already contacted the school to report the absence. The district will send a written notice to parents if their minor student appears to be in danger of exceeding the maximum allowable number of absences and will notify the district attorney and the parent if a child may be considered truant. Parents may contact the child's principal for additional information regarding student absences.
- L. Parents have the right to review the district's courses of study and textbooks. Arrangements for this review can be made through the building principal.
- M. Students may be excused from school for religious purposes provided the parent contacts the building principal to request such an absence.
- N. Parents have the right to review all district policies, including parental involvement policies. Copies of these policies are available through the superintendent's office.
- O. Parents have the right to participate in parent-teacher organizations. Information regarding these groups will be made available during activities such as enrollment, schedule pickups and back to school night. Parents who wish to have additional information regarding these groups can obtain more detail through the principal's office.
- P. Parents may opt out of selected district level data collection related to state longitudinal student data system reporting. Parents may not opt out of necessary and essential record collecting. Parents may file an opt out request through the superintendent's office.
- Q. The district will not procure, solicit to perform, arrange for the performance of, perform surgical procedures or perform a physical examination upon a minor student or prescribe any prescription drugs to a minor student without

first obtaining a written consent for the proposed assessment or treatment. The written consent will be effective for the school year for which it was granted, and must be renewed each subsequent school year. If the assessment or treatment for which the written consent is provided is performed through telemedicine at a school site, and if the written consent is provided by the Parent and is currently effective, the health professional shall not be required to verify that the parent is at the school site.

- R. The district will not procure, solicit to perform, arrange of the performance of or perform an assessment for mental health therapy on a minor student without first obtaining consent of a parent or legal guardian of the minor. The written consent will be effective for the school year for which it was granted, and must be renewed each subsequent school year. If the assessment or treatment for which the written consent is provided is performed through telemedicine at a school site, and if the written consent is provided by the Parent and is currently effective, the health professional shall not be required to verify that the parent is at the school site. However, a student shall not be seen without consent.
- S. A student shall not be vaccinated at school or on school grounds or receive a vaccine as part of the mobile vaccination effort without prior written authorization, including the signature of the parent or legal guardian of the student for the vaccine or group of vaccines to be administered during a single visit.

Parents requesting information outlined in this policy should submit written requests for information through the building principal or superintendent's office, as noted in the respective section. Appropriate school personnel will either make the information available or provide a written explanation of why the information is being withheld within ten (10) days of the request. Any parent whose request is denied or who does not receive a response within fifteen (15) days may submit a written request for the information to the board of education. The board will include an item on its next public meeting agenda (or the following meeting, if time does not permit inclusion of the item on the agenda) to allow the board to formally consider the parent's request.

Reference: OKLA. STAT. tit. 70 § 1-116.2
OKLA. STAT. tit. 25 § 2001
OKLA. STAT. tit. 25 § 2004, et seq.
OKLA. STAT. tit. 70 § 1210.191
O.A.C. 310: 535-1-2
O.A.C. 210: 10-2-1
OKLA. STAT. tit. 70 § 1210.191
O.A.C. 310: 535-1-2
O.A.C. 210: 10-2-1, et seq.

DISTRICT-WIDE PARENTAL INVOLVEMENT POLICY
(Title I, Part A Programs)

PART I. GENERAL EXPECTATIONS

The purpose of this policy is to establish the district's expectations for parental involvement. [Section 1118(a)(2), ESSA.] The district agrees to implement the following statutory requirements:

1. The school district will put into operation programs, activities and procedures for the involvement of parents in all of its schools with Title I, Part A programs, consistent with Section 1118 of the Elementary and Secondary Education Act (ESEA) as reauthorized by the Every Student Succeeds Act (ESSA) of 2015. Those programs, activities and procedures will be planned and operated with meaningful consultation with parents of participating children.
2. Consistent with section 1118, the school district will work with its schools to ensure that the required school-level parental involvement policies meet the requirements of section 1118(b) of the ESSA, and each include, as a component, a school-parent compact consistent with section 1118(d) of the ESSA.
3. The school district will incorporate this district-wide parental involvement policy into its LEA plan developed under section 1112 of the ESSA.
4. In carrying out the Title I, Part A parental involvement requirements, to the extent practicable, the school district and its individual schools will provide full opportunities for the participation of parents with limited English proficiency, parents with disabilities, and parents of migratory children, including providing information and school reports required under section 1111 of the ESSA in an understandable and uniform format and, including alternative formats upon request, and, to the extent practicable, in a language parents understand.
5. If the LEA plan for Title I, Part A, developed under section 1112 of the ESSA, is not satisfactory to the parents of participating children, the school district will submit any parent comments with the plan when the school district submits the plan to the State Department of Education.
6. The school district will involve the parents of children served in Title I, Part A schools in decisions about how the 1 percent of Title I, Part A funds reserved for parental involvement is spent, and will ensure that not less than 95 percent of the one percent reserved goes directly to the schools.

7. The school district will be governed by the following statutory definition of parental involvement, and expects that its Title I schools will carry out programs, activities and procedures in accordance with this definition:

Parental involvement means the participation of parents in regular, two-way, and meaningful communication involving student academic learning and other school activities, including ensuring—

- A. *that parents play an integral role in assisting their child's learning;*
 - B. *that parents are encouraged to be actively involved in their child's education at school;*
 - C. *that parents are full partners in their child's education and are included, as appropriate, in decision-making and on advisory committees to assist in the education of their child;*
 - D. *the carrying out of other activities, such as those described in section 1118 of the ESSA.*
8. The school district will inform parents and parental organizations of the purpose and existence of the parental information and resource center in the state.

PART II. DISTRICT'S IMPLEMENTATION OF DISTRICT-WIDE PARENTAL INVOLVEMENT POLICY

The district will implement or accomplish each of the following components. [Section 1118(a)(2), ESSA.]

1. The district will take the following actions to involve parents in the joint development of its district wide parental involvement plan under section 1112 of the ESSA:
Annual reviews, evaluations, committee meetings, parent-teacher conferences
2. The district will take the following actions to involve parents in the process of school review and improvement under section 1116 of the ESSA:
Annual reviews, evaluations, committee meetings, parent-teacher conferences
3. The district will provide the following necessary coordination, technical assistance, and other support to assist Title I, Part A schools in planning and implementing effective parental involvement activities to improve student academic achievement and school performance:
Annual reviews, evaluations, committee meetings, parent-teacher conferences
4. The district will coordinate and integrate parental involvement strategies in Part A with parental involvement strategies under the Head Start program.

5. The district will take the following actions to conduct, with the involvement of parents, an annual evaluation of the content and effectiveness of this parental involvement policy in improving the quality of its Title I, Part A schools. The evaluation will include identifying barriers to greater participation by parents in parental involvement activities (with particular attention to parents who are economically disadvantaged, are disabled, have limited English proficiency, have limited literacy, or are of any racial or ethnic minority background). The school district will use the findings of the evaluation about its parental involvement policy and activities to design strategies for more effective parental involvement, and to revise, if necessary (and with the involvement of parents) its parental involvement policies.

6. The district will build the schools' and parent's capacity for strong parental involvement, in order to ensure effective involvement of parents and to support a partnership among the school involved, parents, and the community to improve student academic achievement, through the following activities specifically described below:
 - A. The school district will, with the assistance of its Title I, Part A schools, provide assistance to parents of children served by the school district or school, as appropriate, in understanding topics such as the following, by undertaking the actions described in this paragraph --
 - i. the State's academic content standards,
 - ii. the State's student academic achievement standards,
 - iii. the State and local academic assessments including alternate assessments,
 - iv. the requirements of Part A,
 - v. how to monitor their child's progress, and
 - vi. how to work with educators:
OSDE conferences and workshops, parent-teacher conferences, literacy night events, and back to school nights

 - B. The school district will, with the assistance of its schools, provide materials and training to help parents work with their children to improve their children's academic achievement, such as literacy training, and using technology, as appropriate, to foster parental involvement, by:

Parent-teacher conferences and literacy workshops

- C. The school district will, with the assistance of its schools and parents, educate its teachers, pupil services personnel, principals and other staff, in how to reach out to, communicate with, and work with parents as equal partners, in the value and utility of contributions of parents, and in how to implement and coordinate parent programs and build ties between parents and schools, by:

Parent-teacher conferences, training sessions through parent-teacher organizations, literacy workshops, school newsletters

- D. The school district will, to the extent feasible and appropriate, coordinate and integrate parental involvement programs and activities with Head Start, Reading First, Early Reading First, Even Start, Home Instruction Programs for Preschool Youngsters, the Parents as Teachers Program, and public preschool and other programs, and conduct other activities, such as parent resource centers, that encourage and support parents in more fully participating in the education of their children, by:

Providing information and encouraging participation in the above-mentioned programs

- E. The school district will take the following actions to ensure that information related to the school and parent- programs, meetings, and other activities, is sent to the parents of participating children in an understandable and uniform format, including alternative formats upon request, and, to the extent practicable, in a language the parents can understand:

Personal and automated phone calls, letters to parents, newsletters and websites will be used to communicate this information

PART III. DISCRETIONARY DISTRICT-WIDE PARENTAL INVOLVEMENT POLICY COMPONENTS

The district incorporates as a part of its policy the following discretionary components:

1. involving parents in the development of training for teachers, principals, and other educators to improve the effectiveness of that training;
2. providing necessary literacy training for parents from Title I, Part A funds, if the school district has exhausted all other reasonably available sources of funding for that training;
3. paying reasonable and necessary expenses associated with parental involvement activities, including transportation and child care costs, to enable parents to participate in school-related meetings and training sessions;
4. training parents to enhance the involvement of other parents;

5. in order to maximize parental involvement and participation in their children's education, arranging school meetings at a variety of times, or conducting in-home conferences between teachers or other educators, who work directly with participating children, with parents who are unable to attend those conferences at school;
6. adopting and implementing model approaches to improving parental involvement;
7. establishing a district wide parent advisory council to provide advice on all matters related to parental involvement in Title I, Part A programs;
8. developing appropriate roles for community-based organizations and businesses, including faith-based organizations, in parental involvement activities; and
9. providing other reasonable support for parental involvement activities under section 1118 as parents may request.

PART IV. ADOPTION

This *District-Wide Parental Involvement Policy* has been developed jointly with, and agreed on with, parents of children participating in Title I, Part A programs, as evidenced by the minutes of the meeting in which parental involvement and the manner in which that would be achieved was deliberated.

The school district will distribute this policy to all parents of participating Title I, Part A children annually.

REVIEW OF INSTRUCTIONAL MATERIAL

In order to promote transparency in the education process, the district's instructional materials will be available for parent review. Instructional materials include items such as teacher manuals, films, tapes and other supplementary materials regardless of format.

In order to review these materials, a parent should submit a written request to the building principal. The request must specify the class/subject, teacher, student's name, and the types of items being requested for review. Within ten (10) days the principal will arrange for a mutually convenient time for the review or will notify the parent that a review cannot be permitted. If the principal declines to allow a parent to review the materials, the principal will provide the parent with an explanation of why the material is not available. All reviews will be conducted between the hours of 8:00 a.m. and 4:00 p.m. at the student's specific school site. Instructional materials may not be removed from the school site.

In the event the requested review is denied or after fifteen (15) days with no response from the principal, the parent may request this information through the board of education in accordance with the district's policy regarding parent rights.

OKLA. STAT. tit. 70 § 11-106.1

**SAFE SCHOOL COMMITTEES AND
HEALTHY AND FIT SCHOOL ADVISORY COMMITTEES**

Safe School Committees

This policy will govern the operation of the district's safe school committees.

1. Each site principal will annually establish a Safe School Committee of at least seven (7) members. Members may be employees, parents, students, volunteers, community members and/or local law enforcement officials. All members of each Safe School Committee shall serve until the following June 30 unless earlier removed from the Committee by the principal for any reason. The principal who appoints the Safe School Committee members shall advise the superintendent, in writing, of the names, addresses and phone numbers of the committee members. In case of a resignation, death or removal of any Committee member, the principal shall immediately appoint a successor Committee member so as to maintain the composition of the Committee as set forth above. Committee members are eligible to serve consecutive terms.
2. The Committee will assist the board in promoting a positive school environment through planning, implementing and evaluating effective prevention, readiness and response strategies.
3. Each Safe School Committee shall study and make recommendations, in writing, to the school principal regarding:
 - Unsafe conditions, possible strategies for students to avoid harm at school, student victimization, crime prevention, school violence and other issues that prohibit the maintenance of a safe school, and student bullying;
 - Professional development needs of faculty and staff to recognize and avoid bullying and implement methods to decrease student bullying;
 - Professional development needs of faculty and staff to recognize and report suspected human trafficking;
 - Methods to encourage the involvement of the community and students, the development of individual relationships between students and school staff, use of problem-solving teams that include counselors and/or school psychologists, and ways to utilize behavioral health resources, including suicide prevention resources.

As part of the process, each Committee shall review the district's policies, traditional and accepted bullying prevention programs utilized by other

states, state agencies or school districts, and the bullying resources provided on the Oklahoma State Department of Education's website.

4. Each Safe School Committee shall meet at least once each semester. Each Committee shall appoint a committee chairperson who shall maintain written minutes of each meeting. The Committee chairperson will be responsible for notifying all Committee members of meetings, preparing agendas for each meeting and posting the agendas in the principal's office for a reasonable period prior to the date and time of each meeting. The principal of each school site will retain all agendas, minutes and other documents related to the Safe School Committee.
5. Prior to the last day of school of each school year, each Safe School Committee shall make a written report to the school principal. The school principal shall transmit a copy of the report to the superintendent. The superintendent shall maintain the reports in the records of the district and shall transmit a copy of each Safe School Committee report to each district board member.
6. Committees may also, if they deem it appropriate, make recommendations to the board regarding the development of a rape / sexual assault program for implementation at the school site. The board will consider any such recommendations to determine whether implementation of the recommended or an alternative program is warranted.

Healthy and Fit School Advisory Committees

The district also establishes Healthy and Fit School Advisory Committees, which shall be combined with the district's Safe Schools Committees. The Healthy and Fit School Advisory Committees are established pursuant to OKLA. STAT. tit. 70, § 24-100a, which created the *Healthy and Fit Kids Act of 2004*.

The Committees shall be composed of no fewer than six (6) individuals who may be the same individuals appointed to the district's Safe School Committees. The composition of the Advisory Committees may include teachers, administrators, parents of students, health care professionals and business community representatives.

The Advisory Committee at each school site shall study and make recommendations to the school principal regarding:

1. Health education;
2. Physical education and physical activity; and
3. Nutrition and health services.

School principals shall give consideration to the recommendations of their respective advisory committees. The Advisory Committee, for purposes of timelines, shall follow the same schedule as established for the district's Safe School Committees.

Reference: 70 OKLA. STAT. §24-100.5, 70 OKLA. STAT. §24-100a

**INTERFERENCE WITH THE
PEACEFUL CONDUCT OF SCHOOL DISTRICT ACTIVITIES**

I. Interfering with Peaceful Conduct

The superintendent or anyone designated by the superintendent or the board of education to maintain order in the school district shall have the authority and power to direct any person to leave school district property or any school activity when students are present, who is not a student, officer or employee thereof, and who:

1. Interferes with the peaceful conduct of activities on school district property;
2. Interferes with the peaceful conduct of school activities off school district property when students are present;
3. Commits an act that interferes with the peaceful conduct of activities on school district property;
4. Commits an act that interferes with the peaceful conduct of school activities off school district property when students are present;
5. Enters school district property for the purpose of committing an act that may interfere with the peaceful conduct of activities on school district property;
6. Enters non-school district property when students are present for the purpose of committing an act that may interfere with the peaceful conduct of school activities

For purposes of Section 1 of this policy, conduct that “interferes with the peaceful conduct of activities on school district property” includes, but is not limited to, actions that directly interfere with any student activities, classes, study, student or faculty safety, housing or parking areas or extracurricular activities or any lawful activity; threatening or stalking any person; damaging or causing waste to any property belonging to another person or the school district; or direct interference with administration, maintenance or security of property belonging to the school district.

Any person to whom this policy applies, who fails to leave a premises as directed or returns within six (6) months thereafter, without first obtaining written permission from the superintendent or anyone designated by the superintendent or the board of education, shall be guilty of a misdemeanor.

Appeal Process

The person may request review of the initial decision by letter to the superintendent. If no written request is received within five (5) calendar days of the person's receipt of written notification of the directive to leave the premises, the directive will be final and nonappealable. If the superintendent issued the initial directive to leave the premises, the superintendent will appoint another administrator to review his/her decision. The decision of the superintendent or his/her designee will be final and nonappealable.

The superintendent or person who issues the directive to leave the premises will give the person to whom the directive is issued a copy of this policy within a reasonable amount of time after issuing the directive. During any appeal process, the person given the directive to leave the premises must remain off school property and away from school activities, whether on school district property or not, unless the superintendent, in writing, instructs that the directive is to be stayed pending the appeal process.

II. Disturbing, Interfering, or Disrupting School District Business

- A. **Disturbing, interfering or disrupting.** Any person, alone or in concert with others and without authorization, who willfully disturbs, interferes or disrupts 1) school district business, including any publicly posted meetings; or 2) school district operations; or 3) any school district employee, agent, official, or representative, shall be guilty of a misdemeanor.
- B. **Refusing to leave property.** Any person who is without authority or who is causing any disturbance, interference or disruption who willfully refuses to disperse or leave any property, building, or structure 1) owned, leased, or occupied by the school district or its employees, agents or representatives; or 2) used in any manner to conduct school district business or operations after proper notice by a peace officer, sergeant-at-arms, or other security personnel, shall be guilty of a misdemeanor.
- C. **Definition of "disturb, interfere or disrupt."** For purposes of Section II of this policy, the term "disturb, interfere or disrupt" means any conduct that is violent, threatening, abusive, obscene, or that jeopardizes the safety of self or others.

References: OKLA. STAT. tit. 21 §§ 1375, 1376
OKLA. STAT. tit. 70 §§ 24-131, 24-131.1
OKLA. STAT. tit. 12 §1398
OKLA. STAT. tit. 21, § 2011

SEX OFFENDERS

Because a safe learning environment promotes academic and social growth, the district desires to protect students at school from those who might expose students to inappropriate acts of a sexual nature. Those required to register with the state as sex offenders have committed acts totally incompatible with a safe learning environment. Accordingly, registered sex offenders are prohibited from being on any district property or attending district-sponsored activities at all times, and administrators are authorized to direct such offenders off district property and to notify law enforcement for noncompliance with that directive.

Limited Exception for Parent/Guardian

If the registered sex offender is the custodial parent or legal guardian of a child who is enrolled at the district, the registered sex offender may only enter district grounds to:

- enroll their child, after prior notice to the site principal
- deliver or retrieve their child during normal school hours
- deliver or retrieve their child from a district-sponsored extracurricular activity

While performing these delivery/retrieval functions, the registered sex offender may not exit his/her vehicle (unless prior approval has been granted by the site principal). The registered sex offender, who is the parent or legal guardian of a child who is enrolled at the district, may not be on district property or at a district function at any other time. Registered sex offenders who are custodial parents or legal guardians of a child who is enrolled at the district will receive communications about their child by phone, letter or e-mail instead of in-person communication with district personnel.

SAFETY DRILLS

The board of education has appointed a committee composed of the superintendent and other designated personnel for the purpose of developing and maintaining the district's emergency plans. A crisis plan will be developed by local officials and the Safe School Committee to provide guidance for those responsible for the safety of students and property.

A minimum of 10 safety drill activities per year will be planned and implemented by the superintendent, the fire marshal, or other civil authorities to ensure orderly movement of students to the safest available space(s) should an emergency occur. Whenever drills occur, all individuals on campus will fully participate in the drills. The following drills will be conducted each school year:

- Security (4 drills per year at different times of day; 1 drill within the first 15 days of the start of each semester and 1 other drill per semester)
- Fire (1 drill within the first 15 days of the start of each semester)
- Tornado (1 drill in September and 1 drill in March)
- Other drills such as security, fire, tornado, terrorism, suicide, weapons, etc. (2 drills per year)

The superintendent will maintain communication with other community agencies in order to share information on preparedness and planned procedures. It is the responsibility of the superintendent to ensure that the schools work in cooperation with these other agencies during such emergencies. Building principals are responsible for documenting each of the safety drills which are conducted and filing a copy of the documentation at the school site, with the district's administrative office, and with the Oklahoma School Security Institute.

Emergency preparedness will be discussed with teachers and students at least once per semester or as deemed necessary by the building administration. Each classroom shall post a copy of rules, evacuation signals, evacuation routes and emergency procedures. Teachers will discuss these procedures with each class using the room during the first day(s) of the school year.

All teachers and staff members shall make themselves familiar with safety procedures. During an actual emergency or a safety drill, teachers are responsible for following all procedures, including ensuring that doors and windows are closed appropriately, electrical circuits and gas jets are turned off, order is maintained, and all students are either accounted for or promptly reported missing to the building principal.

In the case of building evacuations, all meeting areas will be at least 50 feet away from buildings and driveways.

Reference: OAC 210:35-13-115, OKLA. STAT. tit. 70 § 5-149

DISTRIBUTION OF MATERIALS

In order to ensure student safety and the orderly operation of the school, non-school materials (fliers, booklets, magazines, buttons, announcements, signs, etc.) will only be distributed to district students under limited circumstances. All school sites will provide notice of the proper procedures for the distribution of materials. Permission to distribute materials is not an endorsement of the content of the materials either by the individual granting the permission or the board of education.

This policy does not apply to official school publications, such as yearbooks or student newspapers, and does not apply to signs posted for events such as STUCO elections.

Authorized Groups

Authorized Groups include district recognized parent-teacher organizations and school sponsored student organizations, programs, and activities. These Authorized Groups may distribute materials to students in any grade as long as these materials are related to the Authorized Group's mission.

Other Individuals and Groups

Other Individuals and Groups (Others) may not distribute materials directly to students younger than 9th grade. Others may distribute materials directly to students at the high school level with the superintendent's prior approval. Others may also request that the district distribute materials to students in any grade by contacting the superintendent. The superintendent has final authority in determining whether the materials are appropriate for distribution and the terms and conditions for the distribution. The following criteria will be used in the superintendent's consideration of the request:

- Materials which are of educational value to students should be considered for distribution;
- Materials which provide notice of a community service or event likely to be of value to students and families may be considered for distribution;
- Materials which are of a political or commercial nature will generally not be considered for distribution, unless there is a compelling reason that the material should be distributed;
- Materials which are inappropriate for the education environment will not be considered for distribution, including materials which:
 - Are obscene to minors - (a) material which, taken as a whole, lacks serious literary, artistic, political or scientific value for minors and, (b) when an average person, applying contemporary community standards, would find

that the material, taken as a whole, appeals to an obsessive interest in sex by minors of the age to whom distribution is directed;

- Are libelous - a false and unprivileged statement about a specific individual which tends to harm the individual's reputation;
- Are vulgar, lewd or indecent - material which, taken as a whole, an average person would deem improper for presentation to minors because of sexual connotations or profane language;
- Display or promote unlawful products or services - material which advertises or advocates the use of products or services prohibited by law from being sold or provided to minors;
- Defames any group - material which disparages a group or a member of a group on the basis of race, color, sex, pregnancy, gender, gender expression or identity, national origin, religion, disability, veteran status, sexual orientation, age, or genetic information – including racial and religious epithets, "slurs," insults and abuse;
- Disrupts school operations - material which, on the basis of past experience or based on specific instances of actual or threatened disruptions relating to the written material in question, is likely to cause a material and substantial disruption of the proper and orderly operation of school activities or school discipline.

If distribution is approved the superintendent or his/her designee shall designate the appropriate time, method, and location of distribution of the materials.

Students

Students may distribute materials at building entrances and exits 30 minutes before the start of the school day and 30 minutes after the conclusion of the day, and in the cafeteria during lunch periods. Students may also distribute materials at the entrances and exits of school facilities (gyms, stadiums, auditoriums, etc.) when those facilities are being used for a school sponsored activity.

The content of any student distributed materials must be appropriate, as outlined above.

Students may not distribute the materials in a manner which is disruptive, and may not pressure or force individuals to accept materials.

Students who distribute materials are responsible for removing all discarded and leftover copies from the facilities prior to leaving the premises after distribution.

Students who violate this policy shall be subject to disciplinary action in accordance with the district's policies on student behavior.

Information Tables at Open House Events

The superintendent may, but is not required, to designate an open house event up to one (1) time per semester to allow Authorized Groups and Others to set up information tables and

meet with parents and students. Authorized Groups may also have additional opportunities and preferential locations for providing materials and information to parents and students. Others will not be excluded solely because of political, religious, or philosophical beliefs.

MEDICAL MARIJUANA, HEMP & CANNABIDIOL (CBD)

Regardless of a student, employee, parent or any individual's status as a medical marijuana license holder, marijuana is not allowed on the premises of the district or in any school vehicle or in any personal vehicle transporting a student under any circumstances. While the use of medical marijuana in conjunction with the possession of a medical marijuana license is legal in the State of Oklahoma, marijuana is a prohibited controlled substance under federal law regardless of the use being for medical purposes. Accordingly, possession of marijuana by a student, employee, parent or any individual, notwithstanding the possession of a medical marijuana license, is strictly prohibited while on the premises of the district and in school vehicles; going to and from and attending district sponsored functions, events, and athletic activities, including those district sponsored functions, events and/or athletic activities which occur in a location other than the premises of the district; utilizing district equipment or transportation; and in any other instance in connection with the district where the district reasonably deems the possession of marijuana to be illegal.

In the event that a student, employee, parent or any individual is found to possess or to have possessed marijuana in any of the instances stated above, the district will proceed with all actions and consequences that are afforded to the district under any state or federal law, employment contract, district policy, student handbook provision, or any other authority applicable to or adopted by the district.

A. Definitions

The following definitions shall apply:

1. Marijuana: all parts of the plant *Cannabis sativa* L., whether growing or not; the seeds thereof; the resin extracted from any part of such plant; and every compound, manufacture, salt, derivative, mixture or preparation of such plant, its seeds or resin (except cannabidiol made from hemp which meets the definition of "Hemp Cannabidiol" as defined below). The term "marijuana" shall not include any federal Food and Drug Administration-approved cannabidiol medication.
2. Hemp Cannabidiol ("Hemp CBD"): a nonpsychoactive cannabinoid made from hemp that has a tetrahydrocannabinol concentration of not more than three-tenths of one percent (0.3%).
3. Hemp: the plant *Cannabis sativa* L. and any part of that plant, including the seeds thereof and all derivatives, extracts, cannabinoids, isomers, acids, salts, and salts of isomers, whether growing or not, with a delta-9 tetrahydrocannabinol concentration of not more than 0.3% on a dry weight basis.
4. THC: tetrahydrocannabinol.

The terms "marijuana" and "possession of marijuana" will be interpreted by the district in accordance with state and federal law. Any conflict between state and federal law as to the definition or treatment of "marijuana," "possession of marijuana," "hemp" or "cannabidiol" will be interpreted in accordance with the circumstances and proper legal authority.

B. Nondiscrimination

There will be no discrimination in the district because of an individual's status as a medical marijuana license holder.

C. Hemp and Hemp Cannabidiol (Hemp CBD)

1. Regulation: Hemp CBD is regulated differently than marijuana under both state and federal law. Possession and administration of Hemp CBD shall be treated differently based on the concentration of THC in the Hemp CBD. In no instance will this section be construed to apply to a substance that (1) is not made from hemp or (2) contains more than 0.3% THC.

a. Hemp CBD Containing 0.0% THC

- (1) Employees and other Non-Student Individuals: Employees and individuals who are not students of the district may possess and self-administer Hemp CBD containing 0.0% THC on the premises of the district. However, employees or non-student individuals must be able to certify, upon request, that the Hemp CBD contains 0.0% THC at the time of possession and/or self-administration via a reliable product label. Employees and non-student individuals are not permitted to self-administer Hemp CBD in the presence of students.
- (2) Students: A parent or legal guardian of a student may administer Hemp CBD containing 0.0% THC to the student in accordance with this policy. Hemp CBD containing 0.0% THC may only be administered to a student in an area designated by the district's personnel. The parent, legal guardian must certify that the Hemp CBD contains 0.0% THC via a declaration given under penalty of perjury prior to administering such Hemp CBD to the student in the district's designated administration area. Such declaration shall be effective for the semester in which it is given. A new declaration must be provided by a parent or legal guardian each semester. After the parent or legal guardian of the student has administered the Hemp CBD containing 0.0% THC to the student, the parent or legal guardian must remove the Hemp CBD from the district's premises.

b. Hemp CBD Containing 0.3% THC

- (1) Employees and other Non-Student Individuals: Employees and individuals who are not students of the district may possess and self-administer Hemp CBD containing up to a maximum of three-tenths of one percent (0.3%) THC on the premises of the district provided they meet one of the following:
 - (a) The employee or individual who is not a student is a medical marijuana license holder; or
 - (b) The employee or individual who is not a student has a written certification from a physician licensed in Oklahoma that the employee or individual that is not a student has been diagnosed by a licensed physician as having one of the following:

- i. Lennox-Gastaut Syndrome;
- ii. Dravet Syndrome, also known as Sever Myoclonic Epilepsy of Infancy;
- iii. Any other severe form of epilepsy that is not adequately treated by traditional medical therapies;
- iv. Spasticity due to multiple sclerosis or due to paraplegia;
- v. Intractable nausea and vomiting; or
- vi. Appetite stimulation with chronic wasting diseases.

Employees or non-student individuals must be able to verify, upon request, (1) that they meet an exception listed above, and (2) that the Hemp CBD contains no more than 0.3% THC at the time of possession and/or self-administration, via a reliable product label or a physician's certification. Employees and non-student individuals are not permitted to self-administer Hemp CBD in the presence of students.

- (2) Students: Students of the district may not possess and/or self-administer Hemp CBD containing THC in an amount no greater than 0.3%. However, the parent, legal guardian or caregiver (as defined in 63 O.S. § 420A) of the student may administer Hemp CBD containing THC in an amount no greater than 0.3% on district premises in accordance with this policy if the student meets one of the following exceptions:

- (a) The student is a medical marijuana license holder; or
- (b) The parent, legal guardian, or caregiver of the student has a written certification from a physician licensed in Oklahoma that the student has been diagnosed by a licensed physician as having one of the following:
 - i. Lennox-Gastaut Syndrome;
 - ii. Dravet Syndrome, also known as Sever Myoclonic Epilepsy of Infancy;
 - iii. Any other severe form of epilepsy that is not adequately treated by traditional medical therapies;
 - iv. Spasticity due to multiple sclerosis or due to paraplegia;
 - v. Intractable nausea and vomiting; or
 - vi. Appetite stimulation with chronic wasting diseases.

The physician's written certification must also provide that the Hemp CBD being administered to the student has a THC level of not more than 0.3% and the Hemp CBD was delivered to the student, parent, or legal guardian in a liquid form.

The parent, legal guardian, or caregiver may administer Hemp CBD containing THC in an amount no greater than 0.3% to the student in an area designated by the district's personnel. The parent, legal guardian, or caregiver must certify that the Hemp CBD contains THC in an amount no greater than 0.3% via a declaration given under penalty of perjury prior to administering such Hemp CBD to the student in the district's designated administration area. Such declaration shall be effective for the semester in which it is given. A new declaration must be provided by the parent, legal guardian, or caregiver each semester. After the parent, legal guardian or caregiver of the student has administered the Hemp CBD to the student, the

parent, legal guardian or caregiver must remove the Hemp CBD from the district's premises.

2. Administration by School Personnel and Storage: In no instance will a district employee administer Hemp CBD to a student, unless they are the parent, legal guardian, or caretaker for that student. The district will not maintain or store a student's Hemp CBD for any length of time.
3. Violations: In the event that a student, employee, parent or any individual is found to have violated the district's policy regarding Hemp CBD possession and/or self-administration, the district will proceed with all actions and consequences that are afforded to the district under any state or federal law, employment contract, district policy, student handbook provision, or any other authority applicable to or adopted by the district.

D. Overlap with Other District Policies

The district recognizes that the legal aspects and consequences of medical marijuana, cannabidiol, and hemp are new and possibly subject to change. These legal aspects and consequences of medical marijuana, cannabidiol, and hemp effect many areas of the district's current policies regarding employees, students, parents and individuals on district premises or attending district events. The district will continue to enforce its current adopted policies. As the need arises with changes in state and/or federal law, the district will consider and/or examine district policies in order to assess whether revisions, if any, may be needed to a district policy in order to comply with state and federal law.

E. Employees

Employees of the district are expected to comply with state and federal law at all times as a term of their continued employment with the district. In that regard, employees are hereby notified that any person who uses or is addicted to marijuana, regardless of whether his or her state has passed legislation authorizing marijuana use for medicinal or recreational purposes, is an unlawful user of or addicted to a controlled substance and is prohibited by federal law from possessing firearms or ammunition. See 18 U.S.C. § 922(g)(3); see also Bureau of Alcohol, Tobacco, Firearms and Explosives ("ATF") open letter to all federal firearms licensees (<https://www.atf.gov/file/60211/download>). Employees are expected to adhere to any and all open letters, formal opinions, directives, or any other instruction provided by federal or state agencies regarding state and/or federal law.

F. Prescription Medications

This policy does not apply to any federal Food and Drug Administration-approved cannabidiol medication. Such medication may not be possessed or self-administered by students. These medications must be stored in district offices and may be administered by the school nurse or other designated district personnel in accordance with the district's policy on Administration of Medicine.

**SERVICE OF LEGAL PAPERS ON SCHOOL GROUNDS
DURING SCHOOL HOURS**

The Board of Education recognizes the importance the judicial system plays in the United States, and that its employees, like other citizens, have a role to play in the administration of justice. The Board also recognizes that service of legal papers on its employees during the school day can (a) materially disrupt the educational process for both students and staff, (b) pose security risks, and (c) adversely affect the conduct of business on District property. Moreover, the delivery of legal documents to a school site or school employee may trigger important timelines and other legal obligations, which if not dealt with in a timely manner, can have serious consequences for the District or the person to whom the document should ultimately be delivered.

Time Limitation and Required Authorizations

To minimize these risks and to create the best possible educational environment, the District will not make employees available for service of legal papers on the grounds of any District property between the workday hours of 7:30 a.m. and 4:30 p.m. No person, not authorized to accept service for another individual or the District, may accept service on behalf of the District, Board of Education and/or the Superintendent, or another staff member. In instances in which a staff member has requested service of legal papers at work, the staff member must notify the building principal in writing of the authorization for service.

Service of Legal Papers

Persons seeking to serve legal papers, including but not limited to subpoenas, on employees during the prohibited time will, upon request, be advised of this policy and provided a copy or electronic address for the policy. Should an individual seeking to serve legal papers refuse to leave District property after being informed of this policy, or an individual repeatedly violates this policy, the District reserves the right to restrict the individual's access to District property in accordance with OKLA. STAT. tit. 21, §§ 1375-1376, OKLA. STAT. tit. 70 § 24-131..

District employees that are aware of school or student-related proceedings at which they may be called to testify are to notify the administration as soon as possible and coordinate with building principals or other administrators to avoid disruption if they are subpoenaed.

Testimony in Civil Matters

In the event employees are contacted directly by an attorney or any other individual regarding testimony concerning a district or district student matter, they should direct that person to their building principal or other member of the administration for further coordination. This duty to inform and contact the building principal does not apply in

instances in which the contacts with the employee concern legal matters personal to the employee, his/her employment, or the employee's child.

Law Enforcement

Law enforcement personnel seeking to serve legal papers mandated by a court of competent jurisdiction should contact the building principal in advance to arrange an appointment. At that time, the building principal may elect to make the employee available to receive service of process.

Witness Fee Due District

Pursuant to OKLA. STAT. tit. 28, § 84.1(B), the District shall be paid a witness fee equal to the amount of a substitute teacher cost, not to exceed \$100 any time a District employee is subpoenaed to appear as a witness in a civil court proceeding. Such payment shall be made well in advance of any District employee's attendance at a proceeding.

FERPA/Privacy Compliance

Administrators who become aware of the need for a District employee to testify in a civil proceeding should evaluate the nature of prospective testimony in order to ensure that such testimony will not violate FERPA mandates and/or Oklahoma confidentiality laws. If there are any concerns that an employee's testimony could violate privacy laws (including FERPA), the District's legal counsel should be notified so that appropriate notice can be issued to affected parties.

CRIMINAL HISTORY AFFIDAVITS FOR CONTRACTORS

The district seeks to ensure that individuals who will be present on district property do not have prior criminal histories indicating that their presence poses a threat to the safety of students and employees. Therefore, and in accordance with applicable law, individuals and entities that enter into certain contracts with the district involving the performance of work/services on district property shall be required to execute criminal history affidavits as set forth below.

Definitions

1. Contractor - A person or business having a contract with the district under which the contractor and/or employees of the contractor will (1) perform services on the property of the district, and/or (2) perform work on a full-time or part-time basis that would otherwise be performed by district employees.

Criminal History Affidavits Required for Contractors

Prior to board approval of any contract between the district and a contractor, an authorized representative of the contractor shall be required to execute and deliver to the district an affidavit declaring under penalty of perjury that (1) no individual working on district premises under authority of the contractor is currently registered or required to register under the provisions of the Oklahoma Sex Offenders Registration Act or the Mary Rippy Violent Crime Offenders Registration Act, and (2) no individual who will perform work on district premises that would otherwise be performed by district employees under the authority of the contractor has been convicted in the United States of any felony offense unless ten (10) years has elapsed since the date of the criminal conviction or the employee has received a pardon for the criminal offense. The affidavit shall be in the form attached to this policy.

No contractor shall be permitted to perform work/services on district property until the contractor or an authorized representative of the contractor has executed and delivered a criminal history affidavit as required by this policy.

Individuals/business/other entities that do not fall within the definition of a “contractor” set forth above, including, but not limited to, vendors, volunteers, college/professional/military recruiters, architects and/or attorneys, are not required to provide criminal history affidavits.

Requests for Felony Records Searches by Contractors

Contractors whose employees will perform work on a full-time or part-time basis that would otherwise be performed by district employees may submit requests for felony records searches regarding their employees to the State Board of Education (“OSBE”). It shall be the sole responsibility of the contractor to request appropriate felony records searches regarding the contractor’s employees from the OSBE consistent with the requirements of this policy.

Reference: OKLA. STAT. tit. 70, § 6-101.48

CONTRACTOR'S CRIMINAL HISTORY AFFIDAVIT

STATE OF OKLAHOMA)
) **ss:**
COUNTY OF _____)

The undersigned, under penalty of perjury, certifies to Independent School District No. 29 of Muskogee County, Oklahoma (the "District") as follows:

- 1. I am a duly authorized representative of _____ (the "Contractor").
- 2. The Contractor seeks to enter into a contract with the District under which employees of Contractor will perform work and/or render services on the property of the District.
- 3. I hereby certify that no employee of the Contractor who will perform work on District premises that would otherwise be performed by District employees has been convicted in the State of Oklahoma, the United States or another state, of any felony offense, unless ten (10) years has elapsed since the date of the criminal conviction or the individual has received a presidential or gubernatorial pardon for the offense.
- 4. I hereby certify that no employee of the Contractor who will perform any work on District premises is currently registered or required to register under the Oklahoma Sex Offenders Registration Act or the Mary Rippy Violent Crime Offenders Registration Act.
- 5. The Contractor and/or its authorized representative(s) ____ has OR ____ has not obtained a felony record search of employees who would be assigned to work on a part-time or full-time basis on the property of the District from the Oklahoma State Board of Education.

6. This Affidavit is intended to comply with OKLA. STAT. tit. 70, § 6-101.48.

EXECUTED AND DELIVERED this ____ day of _____, 20__.

Organization Name ("Contractor")

By: _____
Name: _____
Title: _____

Subscribed and sworn to before me this ___ day of _____, 20__.

My Commission expires: _____
Notary Public

[SEAL]

**FINANCIAL GIFTS TO THE DISTRICT UNDER THE OKLAHOMA EQUAL
OPPORTUNITY EDUCATION SCHOLARSHIP ACT**

In addition to the procedure for accepting gifts outlined in the District's *Public Gifts to the Schools* policy, the District, and approved public school foundations, may also accept financial contributions from individuals and business entities consistent with the *Oklahoma Equal Opportunity Education Scholarship Act* ("OEOESA"). When doing so, the District, and any approved public school foundation, shall follow the application, registration, reporting, and continuing eligibility requirements outlined in OKLA. STAT. tit. 68, § 2357.206 and O.A.C. 710: 15-50-115.1. The District shall also follow the guidelines set forth in this policy.

Definitions

As used in this policy, the following words and phrases are defined as follows:

"Public school foundation" means a nonprofit entity formed pursuant to the laws of Oklahoma that is exempt from federal income taxation pursuant to either Sections 501(c)(3) or 509(a) of the Internal Revenue Code of 1986, as amended, which must also be approved by the Oklahoma Tax Commission ("OTC" or "Tax Commission") and the Board of Education prior to accepting qualifying donations under the OEOESA;

"Educational improvement grant" means a grant to an eligible public school to implement an innovative educational program for students, including the ability for multiple public schools to make application and be awarded a grant to jointly provide an innovative educational program; and

"Innovative educational program" means an advanced academic or academic improvement program that is not part of the regular coursework of a public school but that enhances the curriculum or academic program of the school or provides early childhood education programs to students.

Application, Continuing Eligibility, and Posting Requirements

Before accepting any financial gifts pursuant to the OEOESA, the District must first be approved by OTC, which shall be accomplished by submitting its application on a form prescribed by the Tax Commission.

Thereafter, so that it may maintain its eligibility to receive donations under the OEOESA, the District shall, in compliance with the administrative rules promulgated by OTC and the Oklahoma State Department of Education, annually report to OTC the following information on a prescribed OTC form (that shall be made available to the District by May 1st of each year) and annually publish this same information on the District's website by September 1st of each year:

1. The name of the innovative educational program or programs and the total amount of grant or grants made to those programs during the immediately preceding school year;

2. A description of how each grant was utilized during the immediately preceding school year and a description of any demonstrated or expected innovative educational improvements;
3. The names of the public schools where innovative educational programs that received grants during the immediately preceding school year were implemented;
4. Where the District collects information on a county-by-county basis; and
5. The total number and total amount of grants made during the immediately preceding school year for innovative educational programs at the public school by each county in which the organization made grants.

Information Collection, Reporting, and Notification Requirements

To comply with its statutory reporting requirements under the OEOESA, the District shall collect information from each contributor which will allow OTC to accurately determine the identity of the contributor. By January 10th of the year immediately following each calendar year, the District shall then electronically provide OTC with the following information on each contribution accepted during such taxable year:

- The District's federal employer identification number;
- The name of each contributor and sufficient other information to accurately determine the identity of each contributor, which must include each contributor's social security number (SSN);
- The date and dollar amount of each contribution; and
- Whether the taxpayer made a written commitment to contribute the same amount for one additional consecutive year.

At least once each taxable year, the District shall notify each contributor that Oklahoma law provides for a total, statewide and per-school district cap on the amount of income tax credits allowed annually. Additionally, at least once each year when OTC publishes the percentage of the contribution which may be claimed as a credit by contributors for the most-recently completed calendar year on the Tax Commission's website (which will be made available by OTC no later than February 15th of each year), the District shall notify contributors of that amount in writing.

Any time the District issues any notice to contributors pursuant to the OEOESA, the following disclaimer shall also accompany the notice:

"This information is provided to you pursuant to the District's legal obligations under the *Oklahoma Equal Opportunity Education Scholarship Act*, OKLA. STAT. tit. 68, § 2357.206. The District does not provide tax, legal, or accounting advice. This material has been prepared for informational purposes only; it is not intended to provide tax, legal, or accounting advice and should not be relied on by you for those purposes. Because tax rules are complex, change frequently, and are dependent upon individual circumstances, consult your tax, legal, and/or accounting advisor(s) before engaging in any transaction regarding this information."

On or before April 30, 2024, and once every four (4) years thereafter, the District shall submit an audited financial statement along with information detailing the benefits, successes, or failures of the programs to the following entities: 1) OTC, 2) the Governor, 3) the President Pro Tempore of the Senate, and 4) the Speaker of the House of Representatives.

Board Approval of Public School Foundations Under the OEOESA

Prior to accepting any OEOESA donation from a public school foundation, the Board must first approve the foundation. The District may approve those foundations which, according to the Board's sole determination, advance the educational objectives of the District, are beneficial to students, meet the requirements of this policy, and have submitted to the Board a copy of the foundation's approved OTC application to receive OEOESA contributions pursuant to OKLA. STAT. tit. 68, § 2357.206(L)(1).

Reference: OKLA. STAT. tit. 68, § 2357.206, O.A.C. 710: 50-15-115.1

[District Logo/Letterhead]

**Donor Agreement Regarding Qualifying Contributions to the
Hilldale School District Under the *Oklahoma Equal Opportunity
Education Scholarship Act***

Tax Year(s): _____

Name of Donor:	
Address:	
Phone Number:	
SSN/EIN:	
Donor Filing Status:	<input type="radio"/> Single/Married Filing Separately <input type="radio"/> Married Filing Jointly <input type="radio"/> Legal Business Entity
Name of Organization:	
Contact Person:	
Organization Address:	
Organization EIN:	
Organization Phone Number:	

Purpose: Donor’s non-refundable contribution will be used to support education services for the students of Hilldale School District. If Donor wishes to earmark this contribution for a specific program or project, please provide those details here:

Contribution Amount:

The Donor will contribute \$ _____ for:

- 1 Year (for a maximum tax credit of 50%*)
 2 Years (for a maximum tax credit of 75%*)

**For contributions made on or after January 1, 2022, an income tax credit is available for contributions made to an eligible public school district pursuant to the Oklahoma Equal Opportunity Education Scholarship Act, OKLA. STAT. tit. 68, § 2357.206 (“OEOESA”). The credit is generally 50% of the total amount of contributions made during a taxable year, not to exceed \$1,000.00 for each taxpayer, \$2,000.00 for married taxpayers filing jointly, or \$100,000.00 for any taxpayer which is a legal business entity, subject to the limitations noted below. Tax credits which are allocated by a pass-through entity to equity owners are only limited in amount for the income tax return of a natural person based upon the limitation of the total credit amount to the entity from which the tax credits have been allocated, and not limited to*

\$1,000.00 for single individuals or limited to \$2,000.00 for married persons filing a joint return. For a taxpayer who makes an eligible contribution and makes a written commitment to contribute the same amount for an additional year, the credit shall be 75% of the total amount of the contribution made during the taxable year. The taxpayer shall provide evidence of the written commitment to the Oklahoma Tax Commission (OTC) when the tax return claiming the credit is filed the first year. See OKLA. STAT. tit. 68, § 2357.206; O.A.C. 710: 15-50-115.1.

Important Deadlines: Contributions to the District under the OEOESA must be postmarked or hand-delivered on or before December 31st of each year. **Contributions and this form should be mailed or hand-delivered to [Attention: _____ Name, Position, Address].**

Information Collection and Reporting: Hilldale School District shall submit certain required information collected on this form to OTC as confirmation of the Donors' eligibility for a tax credit under the OEOESA. The Donor must also submit proof of their contribution to OTC when claiming the tax credit.

Important Tax Credit Information: Tax credits under the OEOESA have an annual statewide cap of \$25,000,000.00 and an annual per-school-district cap of \$200,000.00. If the total credits claimed exceeds either of these caps, the credit to the taxpayer will be the taxpayer's proportionate share of the cap for the taxable year after allocation of any amount of credits not claimed by other eligible organizations and taxpayers under the OEOESA. Credits earned but not allowed due to the application of statewide caps will be considered suspended and authorized to be used in the next immediate tax year and applied to the next year's statewide cap. Any credits authorized by the OEOESA that are allowed but not used in any tax year may be carried over, in order, to each of the three (3) subsequent tax years.

Disclaimer: Any information provided to you in this document or any communications you may receive from the District concerning or pursuant to the OEOESA are not tax, legal, or accounting advice. The District does not provide tax, legal, or accounting advice. Any information concerning tax credits or the OEOESA contained herein has been prepared for informational purposes only; it is not intended to provide tax, legal, or accounting advice and should not be relied on by you for those purposes. Because tax rules are complex, change frequently, and are dependent upon individual circumstances, consult your tax, legal, and/or accounting advisor(s) before engaging in any transaction regarding this information.

Donor hereby agrees to make a contribution that qualifies for an *Oklahoma Equal Opportunity Education Scholarship Act* tax credit to Hilldale School District in accordance with the terms above.

Donor Signature & Date:	
Organization Representative Signature & Date:	

TUITION REIMBURSEMENT FOR CERTIFIED AND SUPPORT STAFF

Hilldale Public Schools encourages employees to continue their education and, with this in mind, the district provides educational assistance based on a fund established each fiscal year for the district. For more information on eligibility and pre-approval due dates, please utilize the applications below.

Tuition Reimbursement for Certified Staff and
Tuition Reimbursement Application for Certified Staff

In accordance with the negotiated agreement, the following purpose, eligibility and policies have been adopted for reimbursement to certified personnel actively employed by the district at the time of class attendance and reimbursement due dates of the current school year. The Higher Education Reimbursement Program provides reimbursement to certified personnel enrolled in an accredited institution to increase such employee's expertise in his or her area of work.

Eligibility Requirements:

Eligibility is limited to active, full-time certified personnel.

Administrators are not eligible for this program at this time. Employees must be currently employed with the district at the beginning and completion of each applied course. Employees must be employed on the reimbursement pay date. The reimbursement application must be received by the assistant superintendent by the specified semester due date. Application forms are able to be downloaded from the school website or requested from human resources.

The educational institution must be a **NATIONALLY ACCREDITED UNIVERSITY** to be considered for reimbursement. Courses toward one advanced degree per educational level while utilizing this program (masters or doctorate) and full credit for each course will be eligible for reimbursement.

Also as part of our recruitment of quality certified staff any teacher teaching outside their area of certification or required by Oklahoma Teacher Certification may apply for reimbursement. If the employee is deemed eligible, an approved copy of the reimbursement application will be returned to him/her.

Reimbursement Policy:

Reimbursements per semester will be distributed amongst approved eligible applicants. The annual available funds will be announced for program and purpose. Reimbursement is not to exceed the employee's out-of-pocket tuition expenses.

Employee Responsibility for Reimbursement:

1. Employee must submit completed applications with verification of tuition charges by the due date specified on the application to dtennison@hilldaleps.org or rwarlick@hilldalepss.org
2. Provide verification of tuition charges and evidence of credit for each course completed (i.e. detailed tuition receipts, student loan paperwork, transcript, account summary from school and/or grade sheet).
3. Employee must present a passing score for classes taken and will not be reimbursed for failed or dropped classes. If you have any questions pertaining to the Educational Assistance Program, please contact Dr. Deborah Tennison.