

**AGENDA OF RED OAK INDEPENDENT SCHOOL DISTRICT
BOARD OF TRUSTEES REGULAR MEETING
Monday, August 19, 2024**

Notice is hereby given that a Regular Meeting of the Board of Trustees of the Red Oak Independent School District will be held on Monday, August 19, 2024 beginning at 7:00 PM at Red Oak ISD Education Service Center, 109 West Red Oak Road, Red Oak, TX 75154.

The subjects to be discussed or considered, or upon which any formal action may be taken, are listed below. Items do not have to be taken in the same order as shown on the meeting notice.

1. CALL TO ORDER / ESTABLISH QUORUM
2. INVOCATION
3. PLEDGES OF ALLEGIANCE
4. RECOGNITIONS
 - A. Red Oak High School FFA
Page Bishop, Angelica Estrada Weaver, and Ryan Pickard, FFA Sponsors
5. SUPERINTENDENT'S REPORT
 - A. Construction Update
Kevin Freels, Assistant Superintendent of District Operations
 - B. District Update
Brenda Sanford, Superintendent
6. OPEN FORUM 3
7. ACTION ITEMS
 - A. Consent Agenda
 1. Minutes from School Board Regular Meeting on July 15, 2024 5
 2. Minutes from School Board Special Meeting on July 29, 2024 8
 3. Payment of Current Bills Over \$50,000 11
 4. Board Policy CDA (LOCAL), CPC (LOCAL), and FL (LOCAL) 14
 5. Board Policy EI (LOCAL) 26
 6. Local Policy Update 123 28
 7. T-TESS Appraiser List for 2024-2025 91
 - B. Consideration and Approval of 2024 Tax Rate and Resolution Setting 93
Tax Rate
Dr. Bill Johnston, Chief Financial Officer
 - C. Consideration and Approval of 2024-2025 Fiscal Year Amended 96
Budget
Dr. Bill Johnston, Chief Financial Officer
 - D. Consideration and Approval of Assignment of Fund Balance and 107
Resolution for 2024-2025
Dr. Bill Johnston, Chief Financial Officer
 - E. INFORMATION ITEMS
 1. Finance Report 109
 2. UIL "No Pass, No Play" Exemptions 127
8. CLOSED SESSION
 - A. Texas Government Code 551.071 - For the purpose of a private consultation with the Board's attorney on any and all subjects or matters authorized by law.
 - B. Texas Government Code 551.072 - For the purpose of discussing the purchase, exchange, lease or value of real property.

- C. Texas Government Code 551.073 - For the purpose of considering a negotiated contract for a prospective gift or donation.
 - D. Texas Government Code 551.074 - For the purpose of considering the appointment, employment, evaluation, reassignment, duties, discipline or dismissal of a public officer or employee; or to hear a complaint or charge against an officer or employee.
 - 1. Personnel Matters
 - E. Texas Government Code 551.076 - To consider the deployment, or specific occasions for implementation, of security personnel or devices.
 - F. Texas Government Code 551.082 - For the purpose of considering discipline of a public school child or children or to hear a complaint by an employee against another employee if the complaint or charge directly results in a need for a hearing.
 - G. Texas Government Code 551.0821 - Personally identifiable information of Public School students.
 - H. Texas Government Code 551.083 - For the purpose of considering the standards, guidelines, terms or conditions the Board will follow, or instruct its representatives to follow, in consultation with representative of employee groups in connection with consultation agreements provided for by Section 13.901 of the Texas Education Code.
 - I. Texas Government Code 551.084 - For the purpose of excluding witness or witnesses from a hearing during examination of another witness.
 - J. Texas Government Code 551.086 - For the purpose of considering economic development negotiations.
9. RECONVENE IN OPEN SESSION FOR ACTION RELATIVE TO CLOSED SESSION
10. ADJOURNMENT

If, during the course of the meeting, discussion of any item on the agenda should be held in a closed meeting, the Board will convene in such closed meeting in accordance with the Open Meetings Act, Government Code, Chapter 551, Subchapters D and E. Before any closed meeting is convened, the presiding officer will publicly identify the section or sections of the Act authorizing the closed meeting. All final votes, actions or decisions will be taken in open meeting.

Any person with a disability or special accommodation need should call 972-617-2941 no later than 10:00 a.m. on the scheduled meeting date.

This notice was posted in compliance with the Open Meetings Act on August 16, 2024 at 4:30 p.m.

Brenda Sanford, Superintendent
(For the Board of Trustees)

AUDIENCE PARTICIPATION SIGN-UP SHEET

Any person wishing to address the Board about a topic related to District business during the period reserved for public comment at a Board meeting must sign up to be heard, in accordance with District policy BED(LOCAL):

1. Each participant will be limited to two (2) minutes to make comments to the Board.
2. Under the Texas Open Meetings Act, the Board is not permitted to discuss or act upon any issues that are not posted on the agenda for tonight's meeting.
3. The Board has adopted complaint policies that are designed to secure, at the lowest possible administrative level, a prompt and equitable resolution of complaints and concerns. Each of these processes provides that, if a resolution cannot be achieved administratively, the person may appeal the administrative decision to the Board as a properly posted agenda item. For further information on those policies, please contact Kevin Freels, Assistant Superintendent of District Operations, for student issues, and Michelle Ailara, Assistant Superintendent of Human Resources, for employee issues at 972-617-2941. If the subject of your comment involves a pending grievance, please continue to seek resolution through the grievance process and address the Board only at the appropriate stage of that process.
4. Under the Texas Open Meetings Act, the Board may exercise its authority to discuss certain subject matters in closed session, including matters involving individual District staff members and individual students. If your comment concerns one of these subjects, please address your concern through the complaint policies described above.
5. Finally, please be aware that rules of decorum will be enforced during the public comment period. Personal attacks, name-calling, and rude or slanderous remarks will not be tolerated. Each participant is legally responsible for the content and consequences of his or her own statements.

Please fill in the information requested below if you wish to address the Board during the public comment period:

Name (please print) _____

Address _____

ROISD Campus Your Child(ren) attends _____

School District of Residence _____ Telephone _____

Topic/ Agenda Item _____

Limit on Participation

Audience participation at a Board meeting is limited to the portion of the meeting designated to receive public comment in accordance with this policy. At all other times during a Board meeting, the audience shall not enter into discussion or debate on matters being considered by the Board, unless requested by the presiding officer.

Public Comment

Regular Meetings

At regular Board meetings, the Board shall permit public comment, regardless of whether the topic is an item on the agenda posted with notice of the meeting.

Special Meetings

At all other Board meetings, public comment shall be limited to items on the agenda posted with notice of the meeting.

Procedures

Individuals who wish to participate during the portion of the meeting designated for public comment shall sign up with the presiding officer or designee before the meeting begins as specified in the Board's procedures on public comment and shall indicate the agenda item or topic on which they wish to address the Board.

Public comment shall occur at the beginning of the meeting.

Except as permitted by this policy and the Board's procedures on public comment, an individual's comments to the Board shall not exceed two minutes per meeting.

Meeting Management

When necessary for effective meeting management or to accommodate large numbers of individuals wishing to address the Board, the presiding officer may make adjustments to public comment procedures, including adjusting when public comment will occur during the meeting, reordering agenda items, deferring public comment on nonagenda items, continuing agenda items to a later meeting, providing expanded opportunity for public comment, or establishing an overall time limit for public comment and adjusting the time allotted to each speaker. However, no individual shall be given less than one minute to make comments.

Board's Response

Specific factual information or recitation of existing policy may be furnished in response to inquiries, but the Board shall not deliberate or decide regarding any subject that is not included on the agenda posted with notice of the meeting.

Complaints and Concerns

The presiding officer or designee shall determine whether an individual addressing the Board has attempted to solve a matter administratively through resolution channels established by policy. If not, the individual shall be referred to the appropriate policy to seek resolution:

- Employee complaints: DGBA
- Student or parent complaints: FNG
- Public complaints: GF

Disruption

The Board shall not tolerate disruption of the meeting by members of the audience. If, after at least one warning from the presiding officer, any individual continues to disrupt the meeting by his or her words or actions, the presiding officer may request assistance from law enforcement officials to have the individual removed from the meeting.

**MINUTES OF THE
RED OAK INDEPENDENT SCHOOL DISTRICT
BOARD OF TRUSTEES REGULAR MEETING
Monday, July 15, 2024**

A Regular Meeting of the Board of Trustees of Red Oak ISD was held Monday, July 15, 2024, beginning at 7:00 PM at the Red Oak ISD Education Service Center, 109 West Red Oak Road, Red Oak, TX 75154.

1. CALL TO ORDER / ESTABLISH QUORUM

The Regular Meeting of the School Board was called to order by Melanie Petersen, President of the School Board, at 7:01 p.m.

The Red Oak ISD School Board met at the Red Oak ISD Education Service Center and the presiding officer, Melanie Petersen, noted that a quorum of Board Members was present; that the meeting was duly called; and that notice of the meeting had been posted in accordance with the Texas Open Meetings Act, Texas Government Code, Chapter 551.00.

The following Board members were present: Melanie Petersen, President; Johnny Knight, Vice President; Michelle Porter, Secretary; John Anderson; Sean Kelly; Donna Knight; and Brian Sebring.

The following Board members were absent: None.

2. INVOCATION

Mr. Knight led the invocation.

3. PLEDGES OF ALLEGIANCE

Mr. Kelly led the Pledges of Allegiance to the American and Texas flags.

4. SUPERINTENDENT'S REPORT

A. Construction Update
Kevin Freels, Assistant Superintendent of District Operations

Mr. Freels gave the Board an update on the new middle school construction progress.

5. OPEN FORUM

No one spoke in Open Forum.

6. ACTION ITEMS

A. Consent Agenda

1. Minutes from School Board Special Meeting on June 17, 2024
2. Minutes from School Board Regular Meeting on June 17, 2024
3. Payment of Current Bills Over \$50,000
4. Adjunct Faculty Agreement and Resolution Regarding Extracurricular Status of 4-H Organization

Mr. Knight made a motion to approve the Consent Agenda as presented. Mr. Sebring seconded the motion. The motion passed 7 – 0.

- B. Consideration and Approval of Official Delegate and Alternate Delegate Designation for TASB Delegate Assembly
Melanie Petersen, Board President

Mr. Sebring made a motion that the Board approve John Anderson as the Official Delegate and Johnny Knight as the Alternate Delegate. Ms. Porter seconded the motion. The motion passed 7 – 0.

- C. Consideration and Approval of the Purchase of Canvas
Laura Kelly, Director of Instructional Technology and Josh Crutchfield, Director of Information Technology

Mr. Sebring made a motion that the Board approve the purchase of Canvas as presented using OMNIA contract R150703. Mr. Anderson seconded the motion. The motion passed 7 – 0.

- D. Consideration and Approval of Shared Service Agreement with the Mesquite Regional Day School Program for the Deaf
Shana Owen, Executive Director of Specialized Learning

Ms. Knight made a motion that Red Oak ISD enter into a Shared Services Agreement (SSA) with the Mesquite Regional Day School Program for the Deaf between Mesquite Independent School District and the other member districts. Mr. Sebring seconded the motion. The motion passed 7 – 0.

- E. Consideration and Approval of MSB School Services Agreement
Shana Owen, Executive Director of Specialized Learning

Mr. Knight made a motion to approve MSB School Services, LLC as the SHARS management vendor for the District in the amount of \$71,099, using Choice Partners contract 23/018SG-01. Mr. Anderson seconded the motion. The motion passed 7 – 0.

7. CLOSED SESSION

The Board convened into Closed Session at 7:21 p.m.

- A. Texas Government Code 551.071 - For the purpose of a private consultation with the Board's attorney on any and all subjects or matters authorized by law.
- B. Texas Government Code 551.072 - For the purpose of discussing the purchase, exchange, lease or value of real property.

- C. Texas Government Code 551.073 - For the purpose of considering a negotiated contract for a prospective gift or donation.
 - D. Texas Government Code 551.074 - For the purpose of considering the appointment, employment, evaluation, reassignment, duties, discipline or dismissal of a public officer or employee; or to hear a complaint or charge against an officer or employee.
 - 1. Personnel Matters
 - E. Texas Government Code 551.076 - To consider the deployment, or specific occasions for implementation, of security personnel or devices.
 - F. Texas Government Code 551.082 - For the purpose of considering discipline of a public school child or children or to hear a complaint by an employee against another employee if the complaint or charge directly results in a need for a hearing.
 - G. Texas Government Code 551.0821 - Personally identifiable information of Public School students.
 - H. Texas Government Code 551.083 - For the purpose of considering the standards, guidelines, terms or conditions the Board will follow, or instruct its representatives to follow, in consultation with representative of employee groups in connection with consultation agreements provided for by Section 13.901 of the Texas Education Code.
 - I. Texas Government Code 551.084 - For the purpose of excluding witness or witnesses from a hearing during examination of another witness.
 - J. Texas Government Code 551.086 - For the purpose of considering economic development negotiations.
8. RECONVENE IN OPEN SESSION FOR ACTION RELATIVE TO CLOSED SESSION

The Board reconvened back into Open Session at 8:03 p.m.

9. ADJOURNMENT

As there was no further business or action to be taken, the meeting adjourned at 8:03 p.m.

Melanie Petersen, Board President

Michelle Porter, Board Secretary

**MINUTES OF THE
RED OAK INDEPENDENT SCHOOL DISTRICT
BOARD OF TRUSTEES SPECIAL MEETING
Monday, July 29, 2024**

A Special Meeting of the Board of Trustees of Red Oak ISD was held Monday, July 29, 2024, beginning at 6:00 PM at the Red Oak ISD Education Service Center, 109 West Red Oak Road, Red Oak, TX 75154.

1. CALL TO ORDER / ESTABLISH QUORUM

The Special Meeting of the School Board was called to order by Melanie Petersen, President of the School Board, at 6:00 p.m.

The Red Oak ISD School Board met at the Red Oak ISD Education Service Center and the presiding officer, Melanie Petersen, noted that a quorum of Board Members was present; that the meeting was duly called; and that notice of the meeting had been posted in accordance with the Texas Open Meetings Act, Texas Government Code, Chapter 551.00.

The following Board members were present: Melanie Petersen, President; Johnny Knight, Vice President; Michelle Porter, Secretary; John Anderson; and Donna Knight.

The following Board members were absent: Sean Kelly and Brian Sebring.

2. INVOCATION

Mr. Anderson led the invocation.

3. PLEDGES OF ALLEGIANCE

Ms. Porter led the Pledges of Allegiance to the American and Texas flags.

4. SUPERINTENDENT'S REPORT

A. Policy Update
Michelle Ailara, Deputy Superintendent

Ms. Ailara updated the board on the process and components of policy updates.

5. OPEN FORUM

No one spoke in Open Forum.

6. ACTION ITEMS

A. Consent Agenda

1. Extracurricular Code of Conduct for 2024-2025

2. Student Code of Conduct for 2024-2025

Mr. Knight made a motion to approve the Consent Agenda as presented. Ms. Porter seconded the motion. The motion passed 5 – 0.

- B. Consideration and Approval of IXL Intervention Program
Lynn Dockery, Director of Curriculum and Instruction

Mr. Knight made a motion to approve the purchase of IXL as presented, using TIPS contract 230105. Mr. Anderson seconded the motion. The motion passed 5 – 0.

7. CLOSED SESSION

The Board did not convene into Closed Session.

- A. Texas Government Code 551.071 - For the purpose of a private consultation with the Board's attorney on any and all subjects or matters authorized by law.
- B. Texas Government Code 551.072 - For the purpose of discussing the purchase, exchange, lease or value of real property.
- C. Texas Government Code 551.073 - For the purpose of considering a negotiated contract for a prospective gift or donation.
- D. Texas Government Code 551.074 - For the purpose of considering the appointment, employment, evaluation, reassignment, duties, discipline or dismissal of a public officer or employee; or to hear a complaint or charge against an officer or employee.
 - 1. Personnel Matters
- E. Texas Government Code 551.076 - To consider the deployment, or specific occasions for implementation, of security personnel or devices.
- F. Texas Government Code 551.082 - For the purpose of considering discipline of a public school child or children or to hear a complaint by an employee against another employee if the complaint or charge directly results in a need for a hearing.
- G. Texas Government Code 551.0821 - Personally identifiable information of Public School students.
- H. Texas Government Code 551.083 - For the purpose of considering the standards, guidelines, terms or conditions the Board will follow, or instruct its representatives to follow, in consultation with representative of employee groups in connection with consultation agreements provided for by Section 13.901 of the Texas Education Code.
- I. Texas Government Code 551.084 - For the purpose of excluding witness or witnesses from a hearing during examination of another witness.
- J. Texas Government Code 551.086 - For the purpose of considering economic development negotiations.

8. RECONVENE IN OPEN SESSION FOR ACTION RELATIVE TO CLOSED SESSION

The Board did not convene into Closed Session.

9. ADJOURNMENT

As there was no further business or action to be taken, the meeting adjourned at 6:20 p.m.

Melanie Petersen, Board President

Michelle Porter, Board Secretary

CHECK		ACCOUNT	
NUMBER	VENDOR	AMOUNT	NUMBER
227604	CEV MULTIMEDIA, LTD.	327,591.00	410 E 11 6398 25 999 0 11 MTL
		327,591.00	Totals for 227604
227612	DELCOM GROUP LP	132,280.10	282 E 11 6396 00 999 1 11 000
		132,280.10	Totals for 227612
227642	MCGRAW-HILL SCHOOL E	4,831.59	410 E 11 6321 25 999 0 11 MTL
227642	MCGRAW-HILL SCHOOL E	82,102.86	410 E 11 6321 25 999 0 11 MTL
227642	MCGRAW-HILL SCHOOL E	16,797.60	410 E 11 6321 25 999 0 11 MTL
		103,732.05	Totals for 227642
227659	HOUGHTON MIFFLIN HAR	31,551.00	199 E 11 6398 00 001 0 11 000
227659	HOUGHTON MIFFLIN HAR	141,217.50	410 E 11 6321 25 999 0 11 MTL
227659	HOUGHTON MIFFLIN HAR	186,331.18	410 E 11 6321 25 999 0 11 MTL
		359,099.68	Totals for 227659
227689	TXU ENERGY	21,629.74	199 E 51 6259 02 001 0 99 000
227689	TXU ENERGY	16,791.06	199 E 51 6259 02 041 0 99 000
227689	TXU ENERGY	4,681.18	199 E 51 6259 02 101 0 99 000
227689	TXU ENERGY	4,384.45	199 E 51 6259 02 102 0 99 000
227689	TXU ENERGY	3,385.42	199 E 51 6259 02 103 0 99 000
227689	TXU ENERGY	5,866.44	199 E 51 6259 02 105 0 99 000
227689	TXU ENERGY	3,114.61	199 E 51 6259 02 999 0 99 000
227689	TXU ENERGY	10,279.42	198 E 51 6259 02 999 0 99 000
227689	TXU ENERGY	2,278.50	199 E 51 6259 02 870 0 99 000
227689	TXU ENERGY	853.30	199 E 51 6259 02 996 0 99 000
227689	TXU ENERGY	1,284.13	199 E 51 6259 02 995 0 99 000
227689	TXU ENERGY	596.45	199 E 51 6259 02 001 0 22 000
		75,144.70	Totals for 227689
		997,847.53	Totals for checks

CHECK		ACCOUNT	
NUMBER	VENDOR	AMOUNT	NUMBER
18683	MHC KENWORTH SOUTH D	137,778.21	240 E 35 6631 00 999 0 99 000
		137,778.21	Totals for 18683

137,778.21 Totals for checks

CHECK		ACCOUNT	
NUMBER	VENDOR	AMOUNT	NUMBER
12095	ENVIROMATIC SYSTEM O	302,586.15	699 E 51 6629 34 999 0 99 000
		302,586.15	Totals for 12095
12098	JOERIS GENERAL CONTR	981,639.75	650 E 81 6629 00 999 0 99 000
		981,639.75	Totals for 12098
		1,284,225.90	Totals for checks

Local Board Policy CDA (LOCAL), CPC (LOCAL), and FL (LOCAL) Update

Presented for:

Board Action X Report/Review Only _____

Supporting documents:

None _____ Attached X Provided Later _____

Contact Person:

Merilee Stone, Coordinator of Assessment and Accountability

Background Information:

Attached you will find local policies updated due to new title changes.

CDA(LOCAL): OTHER REVENUES – INVESTMENTS

- Changes title of assistant superintendent of business services to chief financial officer

CPC(LOCAL): OFFICE MANAGEMENT – RECORDS MANAGEMENT

- Changes title of assistant superintendent of district operations to chief operations officer

FL(LOCAL): STUDENT RECORDS

- Changes title of assistant superintendent of district operations to chief operations officer

Fiscal Implications:

N/A

Administrative Recommendation:

The administration recommends that the Board revise Board Policy CDA (LOCAL), CPC (LOCAL), and FL (LOCAL) as recommended.

PROPOSED REVISIONS

Investment Authority The ~~assistant superintendent of business services~~ **chief financial officer** or other person designated by Board resolution shall serve as the investment officer of the District and shall invest District funds as directed by the Board and in accordance with the District's written investment policy and generally accepted accounting procedures. All investment transactions except investment pool funds and mutual funds shall be settled on a delivery versus payment basis.

Approved Investment Instruments From those investments authorized by law and described further in CDA(LEGAL) under Authorized Investments, the Board shall permit investment of District funds, including bond proceeds and pledged revenue to the extent allowed by law, in only the following investment types, consistent with the strategies and maturities defined in this policy:

1. Obligations of, or guaranteed by, governmental entities as permitted by Government Code 2256.009.
2. Certificates of deposit and share certificates as permitted by Government Code 2256.010.
3. Fully collateralized repurchase agreements permitted by Government Code 2256.011.
4. A securities lending program as permitted by Government Code 2256.0115.
5. Banker's acceptances as permitted by Government Code 2256.012.
6. Commercial paper as permitted by Government Code 2256.013.
7. No-load mutual funds, except for bond proceeds, and no-load money market mutual funds, as permitted by Government Code 2256.014.
8. A guaranteed investment contract as an investment vehicle for bond proceeds, provided it meets the criteria and eligibility requirements established by Government Code 2256.015.
9. Public funds investment pools as permitted by Government Code 2256.016.

Safety The primary goal of the investment program is to ensure safety of principal, to maintain liquidity, and to maximize financial returns within current market conditions in accordance with this policy. In-

OTHER REVENUES
INVESTMENTS

CDA
(LOCAL)

vestments shall be made in a manner that ensures the preservation of capital in the overall portfolio, and offsets during a 12-month period any market price losses resulting from interest-rate fluctuations by income received from the balance of the portfolio. No individual investment transaction shall be undertaken that jeopardizes the total capital position of the overall portfolio.

Investment Management

In accordance with Government Code 2256.005(b)(3), the quality and capability of investment management for District funds shall be in accordance with the standard of care, investment training, and other requirements set forth in Government Code Chapter 2256.

Liquidity and Maturity

Any internally created pool fund group of the District shall have a maximum dollar weighted maturity of 180 days. The maximum allowable stated maturity of any other individual investment owned by the District shall not exceed one year from the time of purchase. The Board may specifically authorize a longer maturity for a given investment, within legal limits.

The District's investment portfolio shall have sufficient liquidity to meet anticipated cash flow requirements.

Diversity

The investment portfolio shall be diversified in terms of investment instruments, maturity scheduling, and financial institutions to reduce risk of loss resulting from overconcentration of assets in a specific class of investments, specific maturity, or specific issuer.

Monitoring Market Prices

The investment officer shall monitor the investment portfolio and shall keep the Board informed of significant changes in the market value of the District's investment portfolio. Information sources may include financial/investment publications and electronic media, available software for tracking investments, depository banks, commercial or investment banks, financial advisers, and representatives/advisers of investment pools or money market funds. Monitoring shall be done monthly or more often as economic conditions warrant by using appropriate reports, indices, or benchmarks for the type of investment.

Monitoring Rating Changes

In accordance with Government Code 2256.005(b), the investment officer shall develop a procedure to monitor changes in investment ratings and to liquidate investments that do not maintain satisfactory ratings.

Funds/Strategies

Investments of the following fund categories shall be consistent with this policy and in accordance with the applicable strategy defined below. All strategies described below for the investment of a particular fund should be based on an understanding of the suitability of an investment to the financial requirements of the District

OTHER REVENUES
INVESTMENTS

CDA
(LOCAL)

and consider preservation and safety of principal, liquidity, market-ability of an investment if the need arises to liquidate before ma-turity, diversification of the investment portfolio, and yield.

Operating Funds Investment strategies for operating funds (including any commingled pools containing operating funds) shall have as their primary objectives preservation and safety of principal, investment liquidity, and maturity sufficient to meet anticipated cash flow requirements.

Custodial Funds Investment strategies for custodial funds shall have as their primary objectives preservation and safety of principal, investment li- quidity, and maturity sufficient to meet anticipated cash flow re- quirements.

Debt Service Funds Investment strategies for debt service funds shall have as their pri- mary objective sufficient investment liquidity to timely meet debt service payment obligations in accordance with provisions in the bond documents. Maturities longer than one year are authorized provided legal limits are not exceeded.

Capital Project Funds Investment strategies for capital project funds shall have as their primary objective sufficient investment liquidity to timely meet capi- tal project obligations. Maturities longer than one year are author- ized provided legal limits are not exceeded.

Safekeeping and Custody The District shall retain clearly marked receipts providing proof of the District's ownership. The District may delegate, however, to an investment pool the authority to hold legal title as custodian of in- vestments purchased with District funds by the investment pool.

Sellers of Investments Prior to handling investments on behalf of the District, a bro- ker/dealer or a qualified representative of a business organization must submit required written documents in accordance with law. [See Sellers of Investments, CDA(LEGAL)]

Representatives of brokers/dealers shall be registered with the Texas State Securities Board and must have membership in the Securities Investor Protection Corporation (SIPC) and be in good standing with the Financial Industry Regulatory Authority (FINRA).

Soliciting Bids for CDs In order to get the best return on its investments, the District may solicit bids for certificates of deposit in writing, by telephone, or electronically, or by a combination of these methods.

Interest Rate Risk To reduce exposure to changes in interest rates that could ad- versely affect the value of investments, the District shall use final and weighted-average-maturity limits and diversification.

The District shall monitor interest rate risk using weighted average maturity and specific identification.

Internal Controls

A system of internal controls shall be established and documented in writing and must include specific procedures designating who has authority to withdraw funds. Also, they shall be designed to protect against losses of public funds arising from fraud, employee error, misrepresentation by third parties, unanticipated changes in financial markets, or imprudent actions by employees and officers of the District. Controls deemed most important shall include:

1. Separation of transaction authority from accounting and recordkeeping and electronic transfer of funds.
2. Avoidance of collusion.
3. Custodial safekeeping.
4. Clear delegation of authority.
5. Written confirmation of telephone transactions.
6. Documentation of dealer questionnaires, quotations and bids, evaluations, transactions, and rationale.
7. Avoidance of bearer-form securities.

These controls shall be reviewed by the District's independent auditing firm.

Annual Review

The Board shall review this investment policy and investment strategies not less than annually and shall document its review in writing, which shall include whether any changes were made to either the investment policy or investment strategies.

Annual Audit

In conjunction with the annual financial audit, the District shall perform a compliance audit of management controls on investments and adherence to the District's established investment policies.

PROPOSED REVISIONS

The Superintendent shall oversee the performance of records management functions prescribed by state and federal law:

- Records administrator, as prescribed by Local Government Code 176.001 and 176.0065. [See BBFA]
- Officer for public information, as prescribed by Government Code 552.201–.205. [See GBAA]
- Public information coordinator, as prescribed by Government Code 552.012. [See BBD]

Local Government Records Act

The term “local government record” shall pertain to all items identified as such by the Local Government Records Act.

“Local Government Record”

Records Management Officer

The ~~assistant superintendent of district operations~~ **chief operations officer** shall serve as and perform the duties of the District’s records management officer as prescribed by Local Government Code 203.023 and shall administer the District’s records management program pertaining to local government records in compliance with the Local Government Records Act.

Notification

The records management officer shall file his or her name with the Texas State Library and Archives Commission (TSLAC) within 30 days of assuming the position.

Electronic Records

The records management officer shall develop procedures for the management of electronic records that comply with the District’s records control schedules and meet the minimum components required by law.

The procedures shall:

1. Specify the objectives of the electronic records management program;
2. Identify the responsibilities of employees who create, receive, or maintain electronic records;
3. Ensure the maintenance of electronic records until the expiration of the applicable retention period and final disposition; and
4. Ensure that electronic records that must be protected from unauthorized use or disclosure are appropriately protected as required by law, regulation, or other applicable requirements.

**Records Control
Schedules**

The records management officer shall file with the TSLAC a written declaration that the District has adopted records control schedules that comply with records retention schedules issued by the TSLAC as provided by law.

Website Postings

The District's records management program shall address the length of time records will be posted on the District's website when the law does not specify a posting period.

**Records Destruction
Practices**

All local government records shall be considered District property and any unauthorized destruction or removal shall be prohibited. The District shall follow its records control schedules, records management program, and all applicable laws regarding records destruction. However, the District shall preserve records, including electronically stored information, and suspend routine record destruction practices where appropriate and in accordance with procedures developed by the records management officer. Such procedures shall describe the circumstances under which local government records scheduled for destruction must be retained. Notification shall be given to appropriate staff when routine record destruction practices must be suspended and when they may be resumed.

Training

The records management officer shall receive appropriate training regarding the Local Government Records Act and shall ensure that custodians of records, as defined by law, and other applicable District staff are trained on the District's records management program, including this policy and corresponding procedures.

PROPOSED REVISIONS

Comprehensive System

The Superintendent shall develop and maintain a comprehensive system of student records and reports dealing with all facets of the school program operation and shall ensure through reasonable procedures that records are accessed by authorized persons only, as allowed by this policy. These data and records shall be stored in a safe and secure manner and shall be conveniently retrievable for use by authorized school officials.

Cumulative Record

A cumulative record shall be maintained for each student from entrance into District schools until withdrawal or graduation from the District.

This record shall move with the student from school to school and be maintained at the school where currently enrolled until graduation or withdrawal. Records for nonenrolled students shall be retained for the period of time required by law. No permanent records may be destroyed without explicit permission from the Superintendent. [See CPC]

Custodian of Records

The ~~assistant superintendent of district operations~~ **chief operations officer** is custodian of all records for currently enrolled students. The ~~assistant superintendent of district operations~~ **chief operations officer** is the custodian of records for students who have withdrawn or graduated. The student handbook made available to all students and parents shall contain a listing of the addresses of District schools, as well as the Superintendent's business address.

Types of Education Records

The record custodian shall be responsible for the education records of the District. These records may include:

1. Admissions data, personal and family data, including certification of date of birth.
2. Standardized test data, including intelligence, aptitude, interest, personality, and social adjustment ratings.
3. All achievement records, as determined by tests, recorded grades, and teacher evaluations.
4. All documentation regarding a student's testing history and any accelerated instruction he or she has received, including any accelerated education plan developed for the student.
5. Health services record, including:
 - a. The results of any tuberculin tests required by the District.

- b. The findings of screening or health appraisal programs the District conducts or provides. [See FFAA]
- c. Immunization records. [See FFAB]
- 6. Attendance records.
- 7. Student questionnaires.
- 8. Records of teacher, school counselor, or administrative conferences with the student or pertaining to the student.
- 9. Verified reports of serious or recurrent behavior patterns.
- 10. Copies of correspondence with parents and others concerned with the student.
- 11. Records transferred from other districts in which the student was enrolled.
- 12. Records pertaining to participation in extracurricular activities.
- 13. Information relating to student participation in special programs.
- 14. Records of fees assessed and paid.
- 15. Records pertaining to student and parent complaints.
- 16. Other records that may contribute to an understanding of the student.

Access by Parents

The District shall make a student's records available to the student's parents, as permitted by law. The records custodian or designee shall use reasonable procedures to verify the requester's identity before disclosing student records containing personally identifiable information.

Records may be reviewed in person during regular school hours without charge upon written request to the records custodian. For in-person viewing, the records custodian or designee shall be available to explain the record and to answer questions. The confidential nature of the student's records shall be maintained at all times, and records to be viewed shall be restricted to use only in the Superintendent's, principal's, or school counselor's office, or other restricted area designated by the records custodian. The original copy of the record or any document contained in the cumulative record shall not be removed from the school.

Copies of records are available at a per copy cost, payable in advance. Copies of records must be requested in writing. Parents

may be denied copies of records if they fail to follow proper procedures or pay the copying charge. If the student qualifies for free or reduced-price lunches and the parents are unable to view the records during regular school hours, upon written request of a parent, one copy of the record shall be provided at no charge.

A parent may continue to have access to his or her child's records under specific circumstances after the student has attained 18 years of age or is attending an institution of postsecondary education. [See FL(LEGAL)]

Access by School Officials

A school official shall be allowed access to student records if he or she has a legitimate educational interest in the records.

For the purposes of this policy, "school officials" shall include:

1. An employee, Board member, or agent of the District, including an attorney, a consultant, a contractor, a volunteer, a school resource officer, and any outside service provider used by the District to perform institutional services.
2. An employee of a cooperative of which the District is a member or of a facility with which the District contracts for placement of students with disabilities.
3. A contractor retained by a cooperative of which the District is a member or by a facility with which the District contracts for placement of students with disabilities.
4. A parent or student serving on an official committee, such as a disciplinary or grievance committee, or assisting another school official in performing his or her tasks.
5. A person appointed to serve on a team to support the District's safe and supportive school program.

All contractors provided with student records shall follow the same rules as employees concerning privacy of the records and shall return the records upon completion of the assignment.

A school official has a "legitimate educational interest" in a student's records when he or she is:

1. Working with the student;
2. Considering disciplinary or academic actions, the student's case, or an individualized education program for a student with disabilities;
3. Compiling statistical data;

4. Reviewing an education record to fulfill the official's professional responsibility; or
5. Investigating or evaluating programs.

**Transcripts and
Transfers of Records**

The District may request transcripts from previously attended schools for students transferring into District schools; however, the ultimate responsibility for obtaining transcripts from sending schools rests with the parent or student, if 18 or older.

For purposes of a student's enrollment or transfer, the District shall promptly forward in accordance with the timeline provided in law education records upon request to officials of other schools or school systems in which the student intends to enroll or enrolls. [See FD(LEGAL), Required Documentation] The District may return an education record to the school identified as the source of the record.

**Records
Responsibility for
Students in Special
Education**

The **executive** director of specialized learning shall be responsible for ensuring the confidentiality of any personally identifiable information in records of students in special education.

A current listing of names and positions of persons who have access to records of students in special education is maintained at the District education service center.

**Procedure to Amend
Records**

Within 15 District business days of the record custodian's receipt of a request to amend records, the District shall notify the parents in writing of its decision on the request and, if the request is denied, of their right to a hearing. If a hearing is requested, it shall be held within 10 District business days after the request is received.

Parents shall be notified in advance of the date, time, and place of the hearing. An administrator who is not responsible for the contested records and who does not have a direct interest in the outcome of the hearing shall conduct the hearing. The parents shall be given a full and fair opportunity to present evidence and, at their own expense, may be assisted or represented at the hearing.

The parents shall be notified of the decision in writing within 10 District business days of the hearing. The decision shall be based solely on the evidence presented at the hearing and shall include a summary of the evidence and reasons for the decision. If the decision is to deny the request, the parents shall be informed that they have 30 District business days within which to exercise their right to place in the record a statement commenting on the contested information and/or stating any reason for disagreeing with the District's decision.

**Directory
Information**

Directory information for District students has been classified into two separate categories:

1. Items for use only for school-sponsored purposes; and
2. Items for all other purposes.

**School-Sponsored
Purposes**

For the following school-sponsored purposes—all District publications and announcements—directory information shall include student name; address; electronic mail address; photograph; date and place of birth; major field of study; degrees, honors, and awards; dates of attendance; grade level; participation in recognized activities and sports; and weight and height of members of athletic teams.

All Other Purposes

The District shall not release student directory information for any purpose other than a school-sponsored purpose, unless required by law. [See FL(LEGAL)]

Local Board Policy EI (LOCAL) Update

Presented for:

Board Action X Report/Review Only _____

Supporting documents:

None _____ Attached X Provided Later _____

Contact Person:

Merilee Stone, Coordinator of Assessment and Accountability

Background Information:

Attached you will find local policies updated to award credit for Languages Other than English

EI (LOCAL): ACADEMIC ACHIEVEMENT

- Adds provisions for how credit may be awarded for language proficiency for languages other than English

Fiscal Implications:

N/A

Administrative Recommendation:

The administration recommends that the Board revise EI (LOCAL) policy.

PROPOSED REVISIONS

Certificate of Coursework Completion

The District shall not issue a certificate of coursework completion to a student who fails to meet all state and local requirements for graduation. [See EIF, FMH]

Partial Credit

When a student earns a passing grade in only half of a course and the combined grade for both halves is lower than 70, the District shall award the student credit for the half with the passing grade.

Award of Credit for Languages Other than English

Credit for a course may be awarded if proficiency of the subject matter of the course is demonstrated. Credit for sequenced courses for languages other than English may be awarded retroactively in accordance with the following:

- 1. A student shall be recognized, through evaluation/assessment, as having prior knowledge and skills in a language other than English.**
- 2. Based on the evaluation/assessment, the student shall be placed in the appropriate level of the language course.**
- 3. Credit for levels I and/or II shall be awarded retroactively when the student earns a grade of 70 or above in the next successive level of the same language.**
- 4. A grade of “P” (proficiency), for which graduation credit is awarded, shall be placed on the transcript for the appropriate level or levels of the language.**
- 5. The grade for the course(s) shall not be included in the calculation of the student’s grade point average (GPA) for class rank.**

ROISD Local Policy Update 123

Presented for:

Board Action X Report/Review Only _____

Supporting documents:

None _____ Attached X Provided Later _____

Contact Person:

Merilee Stone, Coordinator of Assessment and Accountability

Background Information:

Attached you will find Board Member Vantage Points for TASB Local Update 123. Local changes are due to changes in legal policy or Texas Administrative Code. The update includes changes in local policy related to:

BBD(LOCAL): BOARD MEMBERS: TRAINING AND ORIENTATION-Sanford

- Clarifies that in the event of a Public Information Act violation training may not be delegated

BFA(LOCAL): ETHICS: CONFLICT OF INTEREST DISCLOSURES-Sanford

- Clarifies the ethical duty of a board member to disclose a financial or other personal interest in a board transaction or decision

CCGB(LOCAL): AD VALOREM TAXES: ECONOMIC DEVELOPMENT-Johnston

- Removed provisions addressing expired laws related to Tax Code Chapter 313 agreements

CKC(LOCAL): SAFETY PROGRAM/RISK MANAGEMENT: EMERGENCY PLANS-Freels/Lamb

- Adds requirements of a Notice Regarding Violent Activity to comply with legal requirements

CKE(LOCAL): SAFETY PROGRAM/RISK MANAGEMENT: SECURITY PERSONNEL-Freels/Lamb

- Addresses security arrangements for Red Oak ISD that include campus security officers report to the Chief of Police and added/clarified Security Officer training requirements and roles as reflected in law.
- The version of this local draft has been revised from the initial TASB Update to reflect ROISD security arrangements.

CKEA(LOCAL): SECURITY PERSONNEL: COMMISSIONED PEACE OFFICERS-Freels/Lamb

- To address all security arrangements in one policy, it is recommended to delete this policy and provisions moved to CKE(Local)

CQC(LOCAL): TECHNOLOGY RESOURCES: EQUIPMENT-Corns

- To meet the legal requirements for adoption of a policy for effective integration of digital devices

DCE(LOCAL): EMPLOYMENT PRACTICES: OTHER TYPES OF CONTRACTS-Ailara

- Specifies an employee may request a hearing when terminated during contract term

DGBA(LOCAL): PERSONNEL – MANAGEMENT RELATIONS: EMPLOYEE COMPLAINTS AND GRIEVANCES-Ailara

- Reflects updates to other policies and expanded policies

EEH(LOCAL): INSTRUCTIONAL ARRANGEMENTS: HOMEBOUND INSTRUCTION-Owen

- Update homebound instruction to include psychological conditions

EF(LOCAL): INSTRUCTIONAL RESOURCES-Owen

- Recommended to delete to allow for updated policies below separating instructional and library materials

EFA(LOCAL): INSTRUCTIONAL RESOURCES: INSTRUCTIONAL MATERIALS-Owen

- Includes provisions previously housed in EF(Local), that at selection materials must be chosen in accordance with stated objectives and administrative regulations and allows for who can submit a request for reconsideration

EFB(LOCAL): INSTRUCTIONAL RESOURCES: LIBRARY MATERIALS-Corns/Owen

- Aligns with changes to Texas Administrative Code

FNG(LOCAL): STUDENT RIGHTS AND RESPONSIBILITIES: STUDENT AND PARENT COMPLAINTS/GRIEVANCES-Freels/Cordero

- Adjusts wording to encompass more policies referenced

GF(LOCAL): PUBLIC COMPLAINTS-Freels

- Adjusts wording to encompass more policies referenced

These changes are explained in the attached Explanatory Notes for TASB Localized Policy Manual Update 123.

Fiscal Implications:

N/A

Administrative Recommendation:

The administration recommends that the Board add, revise, or delete (LOCAL) policies as recommended by ROISD Administration.

Explanatory Notes

TASB Localized Policy Manual Update 123

Red Oak ISD

ATTN(NOTE)

GENERAL INFORMATION ABOUT THIS UPDATE

Please note:

Unless otherwise noted, references to legislative bills throughout these explanatory notes refer to Senate Bills (SB) or House Bills (HB) from the 88th Legislature, regular and special sessions. All referenced bills have already gone into effect unless otherwise noted.

The Local Policy Overview for Update 123, available with your Update 123 materials under [Local Manual Updates](#) on Policy Online® (TASB login required), provides a general, high-level overview of the changes to the local policies included in the update. **Legal policies provide the legal framework for key areas of district operations and are not adopted by the board.**

AIB(LEGAL)

ACCOUNTABILITY: PERFORMANCE REPORTING

The Results Driven Accountability (RDA) section of the policy has been deleted. TEA included RDA information in the Accountability Manual starting in 2023 and repealed the RDA information in the Administrative Code. This change aims to streamline information used in academic accountability and RDA systems.

AIC(LEGAL)

ACCOUNTABILITY: INTERVENTIONS AND SANCTIONS

A citation to the Administrative Code has been included under Student Enrollment and Assignment, Enrollment Provision in Contract, regarding campuses that are closed and repurposed.

As 19 TAC 97.2005 has been repealed, the reference to Results Driven Accountability has been deleted from the section on Special Program Performance Determination.

AIE(LEGAL)

ACCOUNTABILITY: INVESTIGATIONS

The word "accreditation" has been removed as a descriptor for investigations in two places within the policy after an amendment to the Administrative Code, effective January 17, 2024.

BBA(LEGAL)

BOARD MEMBERS: ELIGIBILITY/QUALIFICATIONS

At Intent to Return, language from the Election Code has been included to minimize confusion regarding the specific requirements for establishing an intent to return to the individual's residence after a temporary absence.

BBB(LEGAL)

ELECTIONS: POST-ELECTION PROCEDURES

HB 5180 added new requirements for public inspection of election records. A reference has been added at Election Records regarding where to find information on public inspection of those records for districts who serve as custodians of their own election records.

BBD(LOCAL)

BOARD MEMBERS: TRAINING AND ORIENTATION

HB 3033 authorizes the attorney general to require trustees to complete training on the Public Information Act if the attorney general finds that there has been a violation of the Act. Language is recommended to make clear that this training after a violation cannot be delegated to the district's Public Information Act coordinator.

BBFA(LOCAL)

ETHICS: CONFLICT OF INTEREST DISCLOSURES

Language is recommended to clarify that a trustee's ethical duty to disclose a financial or other personal interest in board transactions goes beyond the statutory conflicts of interest set out in state and federal law. The added language serves to demonstrate a commitment to avoid undue influence, increase transparency, and avoid the appearance of impropriety in public dealings.

Explanatory Notes

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CCG(LLEGAL)

LOCAL REVENUE SOURCES: AD VALOREM TAXES

HB 3273, effective January 1, 2024, revised the Tax Code and requires a taxing unit, including a school district, to provide specific notice to property owners on its website. These provisions have been included in the Appraisal District Property Tax Database section of the policy.

CCGA(LLEGAL)

AD VALOREM TAXES: EXEMPTIONS AND PAYMENTS

This policy has been updated to indicate that a board that adopted an exemption for the 2022 tax year may not reduce the amount or repeal that exemption based on SB 2 from the second special session of the 88th Legislature. [See Homestead, Local Options.]

HB 4559, from the 88th regular session, increased the population range for certain districts to provide that the split payment option does not apply to the district's taxes collected by another taxing unit that has adopted that option. [See Split Payments, In Certain Counties.]

CCGB(LLEGAL)

AD VALOREM TAXES: ECONOMIC DEVELOPMENT

HB 4559 increased the population threshold for determining a large municipality for provisions related to the appointment of reinvestment zone board members. [See Tax Increment Financing Act, Large Municipality.]

Substantial changes have also been made based on HB 5 to incorporate the Texas Jobs, Energy, Technology, and Innovation Act.

CCGB(LLOCAL)

AD VALOREM TAXES: ECONOMIC DEVELOPMENT

Substantial changes are recommended to remove provisions addressing expired laws related to Tax Code Chapter 313 agreements. If your district consulted with legal counsel to revise this policy, we recommend discussing the proposed revisions with them. If the district's agreements have expired completely, please contact your policy consultant for additional revisions.

CKB(LLEGAL)

SAFETY PROGRAM/RISK MANAGEMENT: ACCIDENT PREVENTION AND REPORTS

TEA's amendments to the Administrative Code rules for mandatory school drills necessitated reorganization of definitions and added clarity to several sections of the policy. Changes in this policy also reflect TEA's amendments to the Administrative Code rules related to active threat exercises.

CKC(LLOCAL)

SAFETY PROGRAM/RISK MANAGEMENT: EMERGENCY PLANS

A section on Notice Regarding Violent Activity is recommended to comply with legal requirements. Administrative procedures must be created to align with TEA's model standards.

CKE(LLOCAL)

SAFETY PROGRAM/RISK MANAGEMENT: SECURITY PERSONNEL

To address in one policy all security arrangements a district may have implemented, we have added CKE(LLOCAL) and moved the relevant provisions from CKEA(LLOCAL) to this policy.

Significant revisions are recommended to the CKE policy series to promote compliance and clarification with HB 3 and other legal requirements.

Regarding the provisions addressing district police officers, as Education Code 37.081 covers both police authority and duties, the margin note has been edited to clarify the scope of the policy language. The section on temporary assignments has been incorporated into Limitations on Nonschool Employment to account for possible off-duty officer use by both the district and other agencies. A section on Interlocal

Explanatory Notes

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Agreement has been added to note that district police officers will function within the scope of the agreement.

Based on the district's security survey responses, provisions have been included to address employees serving full-time as security officers.

The Legal Issues in Update 123 memo, available with your Update 123 materials under [Local Manual Updates](#) on Policy Online (TASB login required), describes common legal concerns and best practices specific to this policy's topic.

CKEA(LOCAL) SECURITY PERSONNEL: COMMISSIONED PEACE OFFICERS

To address in one policy all security arrangements the district has implemented, we have deleted this policy and moved the provisions to CKE(LOCAL).

CKED(LEGAL) SECURITY PERSONNEL: OTHER SECURITY ARRANGEMENTS

The provisions of this policy address commissioned security officers with Level III training under the Department of Public Safety hired through a security services contractor or as a district employee in accordance with the Education Code and the Occupations Code.

CMD(LEGAL) EQUIPMENT AND SUPPLIES MANAGEMENT: INSTRUCTIONAL MATERIALS CARE AND ACCOUNTING

Cross-references throughout this policy have been updated to EFA since policy EF has been separated into EFA (instructional materials) and EFB (library materials).

CPC(LEGAL) OFFICE MANAGEMENT: RECORDS MANAGEMENT

Edits to this policy at Destruction of Records remove a reference to 13 TAC 7.123(c), which was deleted from Texas State Library and Archives Commission rules, effective March 6, 2024.

CQA(LEGAL) TECHNOLOGY RESOURCES: DISTRICT, CAMPUS, AND CLASSROOM WEBSITES

HB 3273, effective January 1, 2024, requires school districts to post a notice informing property owners of the property tax database maintained by the appraisal district. Language has been added at item 28 under the section on Other Required Internet Postings.

CQC(LEGAL) TECHNOLOGY RESOURCES: EQUIPMENT

A section on Guidelines for Use of Digital Devices has been added to address the TEA and Health and Human Services Commission model health and safety guidelines for the use of digital devices, which are required by the Education Code and were issued in October 2023.

CQC(LOCAL) TECHNOLOGY RESOURCES: EQUIPMENT

This new local policy is recommended to meet the legal requirement for the board to adopt a policy for the effective integration of digital devices in the district. The policy language adopts the model health and safety guidelines developed by TEA and the Health and Human Services Commission and clarifies that the superintendent must develop regulations for implementation.

DCE(LOCAL) EMPLOYMENT PRACTICES: OTHER TYPES OF CONTRACTS

Revisions at Termination During Contract Term are recommended to specify that an employee may request a hearing before the board to appeal discharge during the contract period and to differentiate between terminations during and at the end of the contract term.

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The Legal Issues in Update 123 memo, available with your Update 123 materials under [Local Manual Updates](#) on Policy Online (TASB login required), describes common legal concerns and best practices specific to this policy's topic.

DGBA(LOCAL) PERSONNEL-MANAGEMENT RELATIONS: EMPLOYEE COMPLAINTS/GRIEVANCES

Extensive revisions within the CKE policy series necessitated an update to the cross-reference in the list of other complaint processes.

Also, to accommodate planned restructuring of policy DIA, we have revised the references to that code in this policy to reflect the DIA series. No other changes have been made to this policy.

The Legal Issues in Update 123 memo, available with your Update 123 materials under [Local Manual Updates](#) on Policy Online (TASB login required), describes common legal concerns and best practices specific to this policy's topic.

DHE(LEGAL) EMPLOYEE STANDARDS OF CONDUCT: SEARCHES AND ALCOHOL/DRUG TESTING

New Department of Transportation rules amend the department's regulated industry drug testing program. The language in the Reports to DPS section has been amended for clarity.

DNA(LEGAL) PERFORMANCE APPRAISAL: EVALUATION OF TEACHERS

Amendments to the Administrative Code allow districts to begin using the Alternate Domain I rubric as part of the Texas Teacher Evaluation and Support System (T-TESS) beginning with the 2024-25 school year. Language has been updated to reflect this change.

DP(LEGAL) PERSONNEL POSITIONS

The section on School Psychological Services has been amended to provide additional clarity and to set out the correct title for licensed specialists in school psychology (LSSPs) as indicated in the Administrative Code.

EEH(LOCAL) INSTRUCTIONAL ARRANGEMENTS: HOMEBOUND INSTRUCTION

TEA's revisions to the *Student Attendance Accounting Handbook (SAAH)* prompted recommended updates to this policy. Students may now receive homebound services for psychological, as well as medical, conditions. The *SAAH* also indicates that the weeks of confinement due to a medical or psychological condition do not need to be consecutive to qualify. The policy language has been updated to reflect this change.

EF(LEGAL) INSTRUCTIONAL RESOURCES

In order to clarify the differences in requirements for instructional materials and library materials, as well as to accommodate the new library collection development standards, policy EF has been divided into EFA (instructional material) and EFB (library material). The content in EF(LEGAL) has moved to either EFA or EFB, as appropriate.

EF(LOCAL) INSTRUCTIONAL RESOURCES

As explained at EF(LEGAL), above, this local policy addressing instructional resources is being deleted. New local policies to address instructional materials and library materials separately are included at EFA and EFB.

Explanatory Notes

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EFA(LEGAL) INSTRUCTIONAL RESOURCES: INSTRUCTIONAL MATERIALS

Content regarding instructional material review and federally required parental inspection has been moved from EF(LEGAL) to EFA(LEGAL).

EFA(LOCAL) INSTRUCTIONAL RESOURCES: INSTRUCTIONAL MATERIALS

The enclosed policy regarding instructional materials is recommended to coordinate with the policy addressing library materials at EFB(LOCAL). The provisions previously housed at EF(LOCAL) have been moved to this code with the following revisions:

- At Selection, a clarification has been made to reflect that instructional materials must be chosen in accordance with stated objectives and administrative regulations and may include items from the State Board of Education list.
- At Reconsideration of Instructional Materials, the list of individuals who can submit a request for reconsideration has been revised. This change is recommended to align with the list provided in the new EFB(LOCAL), which permits an employee or parent or guardian to submit these requests. If the district would like to expand this list, please contact your policy consultant.

Please review the information at Formal Reconsideration, which specifies who will receive forms requesting the reconsideration of instructional material and who will appoint a reconsideration committee. If the policy needs to identify a different position for these responsibilities, please contact your policy consultant for assistance with revisions.

The Legal Issues in Update 123 memo, available with your Update 123 materials under [Local Manual Updates](#) on Policy Online (TASB login required), describes common legal concerns and best practices specific to this policy's topic.

EFB(LEGAL) INSTRUCTIONAL RESOURCES: LIBRARY MATERIALS

EFB(LEGAL) has been revised to incorporate new library collection development standards adopted by the Texas State Library and Archives Commission (TSLAC), effective January 23, 2024. The policy includes a note regarding the Fifth Circuit Court of Appeals enjoinder and the resulting unenforceability of certain statutes related to library material. The TSLAC Library Collection Development Standards are not currently enjoined by the Fifth Circuit Court of Appeals.

EFB(LOCAL) INSTRUCTIONAL RESOURCES: LIBRARY MATERIALS

This recommended policy aligns with changes to the Administrative Code and the new collection development standards for school libraries as a result of HB 900. Please review the following information in your policy:

- The location of the form for formal reconsideration;
- The position title for the person responsible for appointing the reconsideration committee; and
- The number of days allocated for appointing the committee, providing the material for review to the committee, and completing the committee's final report.

If any information needs to be updated or if further revisions to the policy are needed, please contact your policy consultant for assistance.

EHBAA(LEGAL) SPECIAL EDUCATION: IDENTIFICATION, EVALUATION, AND ELIGIBILITY

A cross-reference to policy EHB has been included for additional requirements relating to the evaluation and identification process when dyslexia is a suspected disability. [See Determination of Initial Eligibility.]

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EHBAB(LLEGAL) SPECIAL EDUCATION: ARD COMMITTEE AND INDIVIDUALIZED EDUCATION PROGRAM

The section on Supplemental Special Education Services (SSES) has been revised to reflect amended Administrative Code rules, effective April 18, 2023. The district is required to notify parents of SSES eligibility and related information during an ARD committee meeting.

A provision regarding an IEP supplement for each child who was enrolled in a district's special education program during the 2019-20 school year or the 2020-21 school year has been removed. That requirement expired on September 1, 2023.

EHBE(LLEGAL) SPECIAL PROGRAMS: BILINGUAL EDUCATION/ESL

Extensive revisions have been made throughout this policy to reflect amended rules relating to emergent bilingual students.

EHBJ(LLEGAL) SPECIAL PROGRAMS: INNOVATIVE AND MAGNET PROGRAMS

Changes to this policy stem from amended Administrative Code provisions relating to innovative courses. The amended rules became effective February 18, 2024.

EKB(LLEGAL) TESTING PROGRAMS: STATE ASSESSMENT

Revisions have been made to remove language that does not require district action to aid in readability and clarity. Citations have also been updated based on rule changes.

FA(LLEGAL) PARENT RIGHTS AND RESPONSIBILITIES

The cross-reference at Parental Rights relating to teaching materials has been updated to reflect the division of policy EF into EFA and EFB.

FFAC(LLEGAL) WELLNESS AND HEALTH SERVICES: MEDICAL TREATMENT

A section on Telehealth in Medicaid Covered Services has been added to provide guidance from Administrative Code rules specific to telehealth services authorized as Texas Medicaid covered services.

The section on opioid antagonists has been updated to reflect new rules effective November 1, 2023.

Changes have also been made to the section on epinephrine auto-injectors to reflect amended Administrative Code rules.

Citations throughout have been updated based on rule amendments.

FNG(LOCAL) STUDENT RIGHTS AND RESPONSIBILITIES: STUDENT AND PARENT COMPLAINTS/GRIEVANCES

Extensive revisions within the CKE policy series necessitated an update to the cross-reference in the list of other complaint processes.

Also, to accommodate planned restructuring of policy FFH, we have revised the references to that code in this policy to reflect the FFH series. No other changes have been made to this policy.

The Legal Issues in Update 123 memo, available with your Update 123 materials under [Local Manual Updates](#) on Policy Online (TASB login required), describes common legal concerns and best practices specific to this policy's topic.

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GBA(LLEGAL)

PUBLIC INFORMATION PROGRAM: ACCESS TO PUBLIC INFORMATION

A cross-reference regarding economic development negotiations under Government Code Chapter 403 has been added.

GF(LLEGAL)

PUBLIC COMPLAINTS

The division of policy EF into EFA and EFB necessitated an update to the cross-reference in this policy.

GF(LOCAL)

PUBLIC COMPLAINTS

Extensive revisions within the CKE policy series necessitated an update to the cross-reference in the list of other complaint processes. No other changes have been made to this policy.

The Legal Issues in Update 123 memo, available with your Update 123 materials under [Local Manual Updates](#) on Policy Online (TASB login required), describes common legal concerns and best practices specific to this policy's topic.

GKA(LLEGAL)

COMMUNITY RELATIONS: CONDUCT ON SCHOOL PREMISES

Amendments to the Code of Federal Regulations necessitated changes to the section regarding operation of a small unmanned aircraft system.

GRA(LLEGAL)

RELATIONS WITH GOVERNMENTAL ENTITIES: STATE AND LOCAL GOVERNMENTAL AUTHORITIES

The Definitions section has been revised to reflect amended Administrative Code rules that include school resource officers and contracted police officers in the definition of "school personnel and volunteers."

Language has been added at Notice to School Personnel to provide direction if the superintendent is the individual alleged to have committed child abuse or neglect.

The Students Taken into Custody section has been updated to incorporate appropriate legal citations and improve clarity.

Instruction Sheet

TASB Localized Policy Manual Update 123

Red Oak ISD

Code	Type	Action To Be Taken	Note
ATTN	(NOTE)	No policy enclosed	See explanatory note
AIB	(LEGAL)	Replace policy	Revised policy
AIC	(LEGAL)	Replace policy	Revised policy
AIE	(LEGAL)	Replace policy	Revised policy
BBA	(LEGAL)	Replace policy	Revised policy
BBBB	(LEGAL)	Replace policy	Revised policy
BBD	(LOCAL)	Replace policy	Revised policy
BBFA	(LOCAL)	Replace policy	Revised policy
CCG	(LEGAL)	Replace policy	Revised policy
CCGA	(LEGAL)	Replace policy	Revised policy
CCGB	(LEGAL)	Replace policy	Revised policy
CCGB	(LOCAL)	Replace policy	Revised policy
CKB	(LEGAL)	Replace policy	Revised policy
CKC	(LOCAL)	Replace policy	Revised policy
CKE	(LOCAL)	ADD policy	See explanatory note
CKEA	(LOCAL)	DELETE policy	See explanatory note
CKED	(LEGAL)	ADD policy	See explanatory note
CMD	(LEGAL)	Replace policy	Revised policy
CPC	(LEGAL)	Replace policy	Revised policy
CQA	(LEGAL)	Replace policy	Revised policy
CQC	(LEGAL)	Replace policy	Revised policy
CQC	(LOCAL)	ADD policy	See explanatory note
DCE	(LOCAL)	Replace policy	Revised policy
DGBA	(LOCAL)	Replace policy	Revised policy
DHE	(LEGAL)	Replace policy	Revised policy
DNA	(LEGAL)	Replace policy	Revised policy
DP	(LEGAL)	Replace policy	Revised policy
EEH	(LOCAL)	Replace policy	Revised policy
EF	(LEGAL)	DELETE policy	See explanatory note
EF	(LOCAL)	DELETE policy	See explanatory note
EFA	(LEGAL)	Replace policy	Revised policy
EFA	(LOCAL)	ADD policy	See explanatory note
EFB	(LEGAL)	Replace policy	Revised policy
EFB	(LOCAL)	ADD policy	See explanatory note

Instruction Sheet
TASB Localized Policy Manual Update 123

Red Oak ISD

Code	Type	Action To Be Taken	Note
EHBAA	(LEGAL)	Replace policy	Revised policy
EHBAB	(LEGAL)	Replace policy	Revised policy
EHBE	(LEGAL)	Replace policy	Revised policy
EHBJ	(LEGAL)	Replace policy	Revised policy
EKB	(LEGAL)	Replace policy	Revised policy
FA	(LEGAL)	Replace policy	Revised policy
FFAC	(LEGAL)	Replace policy	Revised policy
FNG	(LOCAL)	Replace policy	Revised policy
GBA	(LEGAL)	Replace policy	Revised policy
GF	(LEGAL)	Replace policy	Revised policy
GF	(LOCAL)	Replace policy	Revised policy
GKA	(LEGAL)	Replace policy	Revised policy
GRA	(LEGAL)	Replace policy	Revised policy



(LOCAL) Policy Comparisons

These documents are generated by an automated process that compares the updated policy to the current policy as found in TASB records.

In this packet, you will find:

- Policies being recommended for revision (annotated)
- New policies (not annotated)
- Policies recommended for deletion (annotated in PDF; not shown in Word)

Annotations are shown as follows:

- Deletions are in a red strike-through font: ~~deleted text~~.
- Additions are in a blue, bold font: **new text**.
- Blocks of text that were moved without changes are shown in green, with double underline and double strike-through formatting to distinguish the text's new placement from its original location: ~~moved text~~ becomes moved text.
- Revision bars appear in the right margin to show sections with changes.

Note: While the annotation software competently identifies simple changes, large or complicated changes—as in an extensive rewrite—may be more difficult to follow. In addition, TASB's recent changes to the policy templates to facilitate accessibility sometimes make formatting changes appear tracked, even though the text remains the same.

For further assistance in understanding policy changes, please refer to the explanatory notes in your Localized Policy Manual update packet or contact your policy consultant.

Contact:	School Districts and Education Service Centers	Community Colleges
	policy.service@tasb.org	colleges@tasb.org
	800.580.7529	800.580.1488

**Public Information
Coordinator**

After Election or
Appointment

The Superintendent shall fulfill the responsibilities of the public information coordinator and shall receive, on behalf of Board members, the training specified by Government Code 552.012. [See GBAA]

After a Violation

A Board member who receives written notice from the attorney general that the member must complete Public Information Act (PIA) training described by GBAA(LEGAL) following the District's failure to comply with a PIA requirement shall complete the training within the timelines described in law. The completion of the training in response to such a notice cannot be delegated.

**Reporting
Continuing
Education Credit**

The Board President shall announce the status of each Board member's continuing education credit. The announcement shall be made annually at the last regular Board meeting before the District's uniform election date, whether or not an election is held. The announcement shall be reflected in the meeting minutes and, when necessary, posted on the District's website in accordance with law.

In addition to disclosures required by law, a Board member shall disclose to the Board any personal financial interest, business interest, or obligation or relationship that in any way creates a potential conflict of interest with a vote on a pending matter.

A Board member shall not use coercive means or promise special treatment in order to influence Board or District decisions, nor use the member's position to seek personal advantage. [See also BBF(LOCAL)]

**Annual Financial
Management Report**

Each Board member shall provide to the District in a timely manner information necessary for the District's annual financial management report. [See CFA]

Note: The Texas Economic Development Act, Tax Code Chapter 313, Subchapters B and C, expired on December 31, 2022.

A limitation on appraised value approved before the expiration continues in effect according to the law as it existed immediately before its expiration, and the law is continued in effect for purposes of the limitation on appraised value.

Texas Economic Development Act

Purpose

These provisions outline the District's procedures ~~for accepting, reviewing, and considering applications and amendments to applications, and, when necessary,~~ enforcing agreements under the Texas Economic Development Act (the Act), as set forth in Tax Code Chapter 313. [See CCGB(LEGAL)]

Definitions

~~In addition to the definitions set out in CCGB(LEGAL), the following definitions apply in this policy:~~

~~"Application review period" means the period during which the Board will consider and act on an application. The application review period begins on the application review start date and ends on the 151st day thereafter, unless the application review period is extended by Board action prior to the expiration date.~~

~~"Appraisal district" means each county appraisal district that appraises property that is the subject of an application.~~

~~"Large project application" means an application for which the qualified investment exceeds \$300,000,000.~~

Filing an Application

~~In the form and formats required by the comptroller, an applicant shall file with the Superintendent the original and copies of the completed application along with a searchable electronic copy certified to contain information identical to the original hard copy. [See CCGB(LEGAL) at Required Contents and Format]~~

~~The Superintendent shall hold any incomplete applications or applications submitted without the full application fee until the application is properly completed and the application fee is paid. The Superintendent's determination of whether an application is complete shall be final.~~

Confidentiality of Applicant Information

~~If the Board decides to consider an application, information provided in connection with an application will not be considered confidential except as allowed by law. [See CCGB(LEGAL) at Confidential Business Information]~~

~~Amending an
Application~~

~~An applicant may seek to amend an application at any time prior to final Board action on the application. If an amended application is filed within 60 days of the end of the application review period, the application review period shall be extended automatically to the 61st day after the date on which the last amended application is filed, unless the Board takes action to extend the application review period otherwise.~~

~~The Superintendent shall review and forward to the comptroller any amended application or supplemental information on receipt.~~

~~Standard
Application Fee~~

~~An applicant shall pay a standard application fee of \$75,000 to the District to cover the District's costs in processing and considering the application. This fee is nonrefundable except as set forth in this policy:~~

- ~~1. For large project fees after the initial fee submission; or~~
- ~~2. If the application is rejected after an initial Board review.~~

~~The standard application fee does not include any amount charged by the comptroller to the applicant for the comptroller's economic impact evaluation.~~

~~Large Project
Application Fee~~

~~For a large project application, the Board may set an application fee higher than the standard application fee if the analysis or evaluation of the application warrants a higher fee. In this case, the applicant shall initially submit the standard application fee. If the Board sets a higher fee, the applicant may withdraw its application and any fee submitted if the applicant disagrees with the higher fee.~~

**Processing an
Application**

Upon receipt of an application and application fee, the Superintendent shall:

**Before Initial Board
Review**

- ~~1. Send the applicant written confirmation of receipt of the application and application fee.~~
- ~~2. Review the application and, as necessary, require the applicant to submit additional and/or supplementary information, including all required schedules.~~
- ~~3. Within seven days of receipt of a completed application, submit the application to the comptroller, together with any economic analysis of the proposed project submitted by the applicant.~~
- ~~4. Obtain necessary conflict of interest disclosures. [See BBFA(LEGAL)]~~

~~Initial Board Review~~ As soon as practical after an application is filed, the Board shall conduct an initial review of the application during which the Board may consider the Superintendent's recommendation and written or oral presentations concerning the application.

~~If, after the initial review, the Board determines that the application is not in the best interests of the District, the Board shall reject the application and return to the applicant the application fee, less any necessary and reasonable costs of the initial review.~~

~~If the Board accepts a large project application for further consideration, the Board may set an appropriate fee in accordance with this policy.~~

~~After Initial Board Review~~ If the Board elects to consider the completed application, the Superintendent shall:

- ~~1. Deposit the application fee and provide required written notice to the applicant and comptroller, with a copy to the appraisal district, that the District has received and will consider the completed application;~~
- ~~2. Deliver to the comptroller a copy of the application and required material along with a request for an economic impact evaluation;~~
- ~~3. Accept on behalf of the Board any amendments or supplements submitted by the applicant, and transmit copies to the comptroller within seven days of receipt;~~
- ~~4. Direct appropriate District personnel to create a link from the District's website to the location on the comptroller's website where copies of applications are posted;~~
- ~~5. Within the time allowed by law, provide all required supplemental information necessary to assist the comptroller and the Texas Education Agency (TEA) with the required analyses;~~
- ~~6. On receipt, provide the applicant and District consultants with a copy of the economic impact evaluation and the school facilities impact analysis;~~
- ~~7. Work with the applicant and District consultants to provide the District and the comptroller with copies of the proposed agreement in a timely manner [see CCGB(LEGAL) at Continued Eligibility];~~
- ~~8. Take all action necessary or required to process the application;~~

- ~~9. Not later than 151 days after the application review start date, present to the Board an agreement for final approval or a request for extension of the application review period;~~
- ~~10. If an extension of the application review period is requested, report each such request to the comptroller within seven days of the decision to grant the extension; and~~
- ~~11. After Board action on the application, if any, transmit all necessary and required information to the comptroller, the applicant, and the appraisal district.~~

~~District Consultants~~ On retention by the Board, District consultants, including legal counsel, shall review the application to ensure it includes all required information. District consultants shall also begin an analysis of the application, consider any legal implications of the application, draft and negotiate an appropriate revenue protection agreement, and evaluate the analyses from the comptroller and TEA on receipt.

~~District consultants shall be paid for services from the application fee and shall complete their analyses in time to assist the Board, as appropriate, in its initial review or final determination on the application.~~

Board Action on Application

~~Completed applications may be considered for approval by the Board only after completion of the economic impact evaluation and the school facilities impact analysis and receipt of the comptroller's certification, as required by the Act.~~

Public Hearing

~~The Board's final determination on an application shall be made after a public hearing at which the Superintendent, District consultants, the applicant, and members of the public may provide input and information concerning the proposed application. The comptroller's certification shall be disclosed at the public hearing.~~

~~The public hearing shall be held at a time that allows the Board to approve or disapprove an application before the expiration of the application review period, unless the deadline has been extended.~~

Findings of Fact

~~After the public hearing, the Board shall make specific written findings as required by law. [See CCGB(LEGAL) at Approval]~~

Adoption of Agreement

~~After considering the comptroller's certification, the economic impact evaluation, the school facilities impact analysis, information from District consultants, and any other relevant information, the Board may approve the application and enter into an agreement that complies with all legal requirements. [See CCGB(LEGAL) at Agreement] The Board shall also consider and adopt an agreement with the applicant to provide protection from or compensation for~~

	any financial risks undertaken by the District in accepting the application.
Waiver of Jobs Requirement	The Board may waive the new jobs creation requirement in accordance with the law. [See CCGB(LEGAL) at Waiver of New Jobs Creation Requirement] If an applicant makes a waiver request subsequent to the original application, the Board may charge the applicant a fee to cover the costs of any consultant required by the Board in making the requisite finding.
Superintendent Responsibilities After Agreement	During the term of any agreement, the Superintendent shall ensure that all reporting requirements are met in a timely manner by the District and the applicant. The Superintendent is authorized to delegate this function to District consultants.
Statements Regarding Conflicts of Interest	Each Board member and any District employee who is a local government official under Local Government Code Chapter 176 Within 60 days after each Board election or appointment, each new Board member shall submit a conflict of interest statement confirming or denying the existence of a conflict of interest or a substantial business interest in each project that is the subject of an application, agreement, or amendment to an agreement with the District. Within This requirement to submit a conflict of interest statement within 60 days after each Board election or the appointment of a Board member, each new Board member shall complete also apply to any new District employee who is a statement. local government official under Local Government Code Chapter 176. The completed statements shall be retained by the District with each affected application or agreement. If a conflict or substantial interest exists, the appropriate disclosure forms shall be completed and filed as required by law. [See BBFA(LEGAL)]

**Emergency
Operations Plan**

The Superintendent shall ensure updating of the District's emergency operations plan and ongoing staff training.

As required by law, the emergency operations plan shall include the District's procedures addressing:

1. Reasonable security measures when District property is used as a polling place;
2. Response to an active shooter emergency;
3. Response to a nearby train derailment, as applicable; and
4. Access to campus buildings and materials necessary for a substitute teacher to carry out the duties of a District employee during an emergency or an emergency drill.

**Notice Regarding
Violent Activity**

~~4.~~ The Superintendent shall develop procedures to notify parents regarding violent activity that has occurred or is being investigated at a campus or other District facility or at a District-sponsored activity.

**District Police
Department**

To ensure sufficient security and protection of students, staff, and property, the Board authorizes the formation of a District police department and shall employ and commission police officers.

Supervisory
Authority

The chief of police shall be accountable to and shall report to the Superintendent. In accordance with law, the Superintendent shall not delegate this supervisory responsibility.

Jurisdiction

The jurisdiction of District police officers shall include all territory within District boundaries, as well as all real and personal property outside the boundaries of the District that is owned, leased, or rented by the District, or is otherwise under the District's control.

Police Authority and
Duties

Each District police officer shall have all the powers, privileges, and immunities of police officers on or off duty within the jurisdiction of the District. Subject to limitations in law, each District police officer shall:

1. Protect the safety and welfare of any person in the jurisdiction of the District and protect the property of the District.
2. Enforce all laws, including municipal ordinances, county ordinances, and state laws, and investigate violations of law as needed. In doing so, District police officers may serve search warrants in connection with District-related investigations in compliance with the Texas Code of Criminal Procedure.
3. Arrest suspects consistent with state and federal statutory and constitutional standards governing arrests, including arrests without warrant, for offenses that occur in the officer's presence or under the other rules set out in the Texas Code of Criminal Procedure.
4. Coordinate and cooperate with commissioned officers of all other law enforcement agencies in the enforcement of this policy as necessary.
5. Enforce District policies, rules, and regulations on District property, in school zones, at bus stops, or at District functions.
6. Investigate violations of District policy, rules, and regulations as requested by the Superintendent and participate in hearings concerning alleged violations.
7. Carry weapons as directed by the chief of police and approved by the Superintendent.
8. Carry out all other duties as directed by the chief of police or Superintendent.

SAFETY PROGRAM/RISK MANAGEMENT
SECURITY PERSONNEL

CKE
(LOCAL)

	<p>A District police officer shall not be assigned routine classroom discipline or administrative tasks.</p>
<p>Limitations on Nonschool Employment</p>	<p>No officer commissioned under this policy shall provide law enforcement or security services for an outside employer without prior written approval from the chief of police and Superintendent. Each District police officer shall enforce all laws, including municipal ordinances, county ordinances, and state laws within another law enforcement agency's jurisdiction while working off-duty or temporarily assigned to another agency.</p>
<p>Relationship with Outside Agencies</p>	<p>The District's police department and the law enforcement agencies with which it has overlapping jurisdiction shall enter into memoranda of understanding and other appropriate interlocal agreements that outline reasonable communication and coordination efforts among the department and the agencies. The chief of police and the Superintendent shall review the memoranda of understanding and other agreements at least once every year. All such agreements shall be approved by the Board.</p>
<p><i>Interlocal Agreement for Mutual Aid</i></p>	<p>While operating pursuant to an interlocal agreement for mutual aid or other support for another law enforcement agency, each District police officer shall perform the duties and have the authorities set out in the agreement, including enforcing all laws within the other agency's jurisdiction.</p>
<p>Video Monitoring</p>	<p>If available, video equipment shall be used on a District police car for safety purposes whenever the flashing lights on the car are in use.</p>
<p><i>Access to Recordings</i></p>	<p>Recordings shall be considered law enforcement records, shall remain in the custody of the chief of police, and shall be maintained as required by the department regulations manual and law. A parent or student who wishes to view a video recording in response to disciplinary action taken against the student may request such access under the procedures set out by law. [See FL(LEGAL)]</p>
<p>Training</p>	<p>Each District police officer shall receive at least the minimum amount of education and training required by law.</p>
<p>Department Regulations Manual</p>	<p>To carry out the provisions in this policy, the police department shall compile and maintain a manual that describes and sets forth operational procedures, rules, and regulations pertaining to the administration of police services. The chief of police and the Superintendent shall review the manual annually and make any appropriate revisions.</p>

SAFETY PROGRAM/RISK MANAGEMENT
SECURITY PERSONNEL

CKE
(LOCAL)

<i>Racial Profiling</i>	The chief of police shall develop and implement regulations to ensure compliance with laws regarding racial profiling. A District police officer shall not initiate any law enforcement action based on an individual's race, ethnicity, or national origin.
<i>Use of Force</i>	The use of force, including deadly force, shall be authorized only when reasonable and necessary, as outlined in the department regulations manual.
<i>High-Speed Pursuit</i>	A District police officer shall not engage in high-speed chases in a motor vehicle when the immediate danger to the public or the officer created by the pursuit exceeds the immediate or potential danger presented by the offenders remaining at large. Guidelines for high-speed pursuits shall be addressed in the department regulations manual.
Complaints	<p>Complaints against a District police officer shall be in writing on a form provided by the District and shall be signed by the person making the complaint. In accordance with law, the District shall provide to the police officer a copy of the complaint.</p> <p>Appeals regarding this complaint process shall be filed in accordance with DGBA, FNG, or GF, as appropriate.</p> <p>[See CKE(LEGAL) and CKEA(LEGAL)]</p>
Noncommissioned Security Officers	To assist with implementing the District's comprehensive safety programs, the District shall employ noncommissioned security officers who have completed the Department of Public Safety (DPS) Level II training course. Security officers shall be accountable to and shall report to the chief of police.
Jurisdiction	The jurisdiction of security officers shall include all territory within District boundaries, as well as all real and personal property outside the boundaries of the District that is owned, leased, or rented by the District, or is otherwise under the District's control.
Duties	<p>A security officer shall not perform routine law enforcement duties.</p> <p>In addition to complying with relevant DPS regulations, a security officer shall:</p> <ol style="list-style-type: none">1. Act as necessary to protect the safety and welfare of any person in the jurisdiction of the District;2. Maintain school security by patrolling campus hallways, completing door checks, and monitoring the perimeter of the campus throughout the day;3. Routinely check exterior doors and interior classroom doors to ensure they are locked;

SAFETY PROGRAM/RISK MANAGEMENT
SECURITY PERSONNEL

CKE
(LOCAL)

4. Complete weekly exterior door audits;
5. Inform campus administrators of malfunctioning cameras, doors, locks, gates, windows, etc., that require the submission of a work order for repair;
6. Assist with campus safety drills (i.e., fire, hold, secure, lock-down, evacuate, shelter);
7. Assist and coordinate with District security personnel and law enforcement personnel as needed;
8. Notify the police, fire department, emergency responders, or other appropriate authority of any situation requiring immediate attention; and
9. Perform other tasks and carry out all other lawful duties as directed by the chief of police.

Training

In addition to the training required by applicable DPS rules, each District security officer assigned to a campus shall receive training in the following:

1. Student mental health, including suicide awareness;
2. Trauma-informed care;
3. Age-appropriate responses;
4. Child abuse identification and reporting;
5. Bullying, cyberbullying, harassment, and dating violence;
6. Special accommodations for students with disabilities (including behavior de-escalation techniques);
7. Confidentiality; and
8. Board policies and District regulations.

SECURITY PERSONNEL
COMMISSIONED PEACE OFFICERS

CKEA
(LOCAL)

**District Police
Department**

~~To ensure sufficient security and protection of students, staff, and property, the Board authorizes the formation of a District police department and shall employ and commission police officers.~~

~~Supervisory
Authority~~

~~The chief of police shall be accountable to and shall report to the Superintendent. In accordance with law, the Superintendent shall not delegate this supervisory responsibility.~~

~~Jurisdiction~~

~~The jurisdiction of police officers shall include all territory within District boundaries, as well as all real and personal property outside the boundaries of the District that is owned, leased, or rented by the District, or is otherwise under the District's control.~~

~~Police Authority~~

~~Police officers employed by the District shall have all the powers, privileges, and immunities of police officers on or off duty within the jurisdiction of the District. Subject to limitations in law, District police officers shall have the authority to:~~

- ~~1. Protect the safety and welfare of any person in the jurisdiction of the District and protect the property of the District.~~
- ~~2. Enforce all laws, including municipal ordinances, county ordinances, and state laws, and investigate violations of law as needed. In doing so, District police officers may serve search warrants in connection with District-related investigations in compliance with the Texas Code of Criminal Procedure.~~
- ~~3. Arrest suspects consistent with state and federal statutory and constitutional standards governing arrests, including arrests without warrant, for offenses that occur in the officer's presence or under the other rules set out in the Texas Code of Criminal Procedure.~~
- ~~4. Coordinate and cooperate with commissioned officers of all other law enforcement agencies in the enforcement of this policy as necessary.~~
- ~~5. Enforce District policies, rules, and regulations on District property, in school zones, at bus stops, or at District functions.~~
- ~~6. Investigate violations of District policy, rules, and regulations as requested by the Superintendent and participate in hearings concerning alleged violations.~~
- ~~7. Carry weapons as directed by the chief of police and approved by the Superintendent.~~
- ~~8. Carry out all other duties as directed by the chief of police or Superintendent.~~

SECURITY PERSONNEL
COMMISSIONED PEACE OFFICERS

CKEA
(LOCAL)

	District police officers shall not be assigned routine classroom discipline or administrative tasks.
Temporary Assignment	District police officers shall enforce all laws, including municipal ordinances, county ordinances, and state laws within another law enforcement agency's jurisdiction while temporarily assigned to the other agency.
Limitations on Nonschool Employment	No officer commissioned under this policy shall provide law enforcement or security services for an outside employer without prior written approval from the chief of police and Superintendent.
Relationship with Outside Agencies	The District's police department and the law enforcement agencies with which it has overlapping jurisdiction shall enter into a memorandum of understanding that outlines reasonable communication and coordination efforts among the department and the agencies. The chief of police and the Superintendent shall review the memorandum of understanding at least once every year. The memorandum of understanding shall be approved by the Board.
Video Monitoring	If available, video equipment shall be used on a District police car for safety purposes whenever the flashing lights on the car are in use.
Access to Recordings	Recordings shall be considered law enforcement records, shall remain in the custody of the chief of police, and shall be maintained as required by the department regulations manual and law. A parent or student who wishes to view a video recording in response to disciplinary action taken against the student may request such access under the procedures set out by law. [See FL(LEGAL)]
Training	All District officers shall receive at least the minimum amount of education and training required by law.
Department Regulations Manual	To carry out the provisions in this policy, the police department shall compile and maintain a manual that describes and sets forth operational procedures, rules, and regulations pertaining to the administration of police services. The chief of police and the Superintendent shall review the manual annually and make any appropriate revisions.
Racial Profiling	The chief of police shall develop and implement regulations to ensure compliance with state law regarding racial profiling. Police officers employed by the District shall not initiate any law enforcement action based on an individual's race, ethnicity, or national origin.
Use of Force	The use of force, including deadly force, shall be authorized only when reasonable and necessary, as outlined in the department regulations manual.

SECURITY PERSONNEL
COMMISSIONED PEACE OFFICERS

CKEA
(LOCAL)

*High-Speed
Pursuit*

~~Officers shall not engage in high-speed chases in a motor vehicle when the immediate danger to the public or the officer created by the pursuit exceeds the immediate or potential danger presented by the offenders remaining at large. Guidelines for high-speed pursuits shall be addressed in the department regulations manual.~~

Complaints

~~Complaints against a District police officer shall be in writing on a form provided by the District and shall be signed by the person making the complaint. In accordance with law, the District shall provide to the police officer a copy of the complaint.~~

~~Appeals regarding this complaint process shall be filed in accordance with DGBA, FNG, or GF, as appropriate.~~

With this policy, the Board adopts the model health and safety guidelines for the effective integration of digital devices in schools that have been developed by the Texas Education Agency and the Health and Human Services Commission.

The Superintendent shall develop regulations that implement these guidelines.

**Non-Chapter 21
Contracts**

Non-Chapter 21 contracts shall be provided for positions included on the list approved by the Board. A non-Chapter 21 contract shall not be governed by Chapter 21 of the Education Code.

**Appeal of
Employment Actions
An Termination
During Contract
Term**

In accordance with DCE(LEGAL), an employee may request a hearing before the Board to appeal discharge during the contract period ~~in accordance with DCE(LEGAL).~~

An employee whose contract is not reissued at the end of the contract period may appeal in accordance with DGBA(LOCAL).

Complaints

In this policy, the terms “complaint” and “grievance” shall have the same meaning.

Other Complaint
Processes

Employee complaints shall be filed in accordance with this policy, except as required by the policies listed below. Some of these policies require appeals to be submitted in accordance with DGBA after the relevant complaint process:

1. Complaints alleging discrimination, including violations of Title IX (gender), Title VII (sex, race, color, religion, national origin), ADEA (age), or Section 504 (disability), shall be submitted in accordance with [the DIA series](#).
2. Complaints alleging certain forms of harassment, including harassment by a supervisor and violation of Title VII, shall be submitted in accordance with [the DIA series](#).
3. Complaints concerning retaliation relating to discrimination and harassment shall be submitted in accordance with [the DIA series](#).
4. Complaints concerning instructional resources shall be submitted in accordance with the EF series.
5. Complaints concerning a commissioned peace officer who is an employee of the District shall be submitted in accordance with [the CKE series](#).
6. Complaints concerning the proposed nonrenewal of a term contract issued under Chapter 21 of the Education Code shall be submitted in accordance with DFBB.
7. Complaints concerning the proposed termination or suspension without pay of an employee on a probationary, term, or continuing contract issued under Chapter 21 of the Education Code during the contract term shall be submitted in accordance with DFAA, DFBA, or DFCA.

Notice to Employees

The District shall inform employees of this policy through appropriate District publications.

Guiding Principles

Informal Process

The Board encourages employees to discuss their concerns with their supervisor, principal, or other appropriate administrator who has the authority to address the concerns. Concerns should be expressed as soon as possible to allow early resolution at the lowest possible administrative level.

Informal resolution shall be encouraged but shall not extend any deadlines in this policy, except by mutual written consent.

PERSONNEL-MANAGEMENT RELATIONS
EMPLOYEE COMPLAINTS/GRIEVANCES

DGBA
(LOCAL)

Direct Communication with Board Members	Employees shall not be prohibited from communicating with a member of the Board regarding District operations except when communication between an employee and a Board member would be inappropriate because of a pending hearing or appeal related to the employee.
Formal Process	<p>An employee may initiate the formal process described below by timely filing a written complaint form.</p> <p>Even after initiating the formal complaint process, employees are encouraged to seek informal resolution of their concerns. An employee whose concerns are resolved may withdraw a formal complaint at any time.</p> <p>The process described in this policy shall not be construed to create new or additional rights beyond those granted by law or Board policy, nor to require a full evidentiary hearing or “mini-trial” at any level.</p>
Freedom from Retaliation	Neither the Board nor any District employee shall unlawfully retaliate against an employee for bringing a concern or complaint.
Whistleblower Complaints	<p>Whistleblower complaints shall be filed within the time specified by law and may be made to the Superintendent or designee beginning at Level Two. Timelines for the employee and the District set out in this policy may be shortened to allow the Board to make a final decision within 60 calendar days of the initiation of the complaint.</p> <p>[See DG]</p>
Complaints Against Supervisors	Complaints alleging a violation of law by a supervisor may be made to the Superintendent or designee. Complaint forms alleging a violation of law by the Superintendent may be submitted directly to the Board or designee.
General Provisions Filing	Complaint forms and appeal notices may be filed by hand-delivery, by electronic communication, including email and fax, or by U.S. Mail. Hand-delivered filings shall be timely filed if received by the appropriate administrator or designee by the close of business on the deadline. Filings submitted by electronic communication shall be timely filed if they are received by the close of business on the deadline, as indicated by the date/time shown on the electronic communication. Mail filings shall be timely filed if they are post-marked by U.S. Mail on or before the deadline and received by the appropriate administrator or designated representative no more than three days after the deadline.
Scheduling Conferences	The District shall make reasonable attempts to schedule conferences at a mutually agreeable time. If the employee fails to appear at a scheduled conference, the District may hold the conference and issue a decision in the employee’s absence.

PERSONNEL-MANAGEMENT RELATIONS
EMPLOYEE COMPLAINTS/GRIEVANCES

DGBA
(LOCAL)

Response	<p>At Levels One and Two, “response” shall mean a written communication to the employee from the appropriate administrator. Responses may be hand-delivered, sent by electronic communication to the employee’s email address of record, or sent by U.S. Mail to the employee’s mailing address of record. Mailed responses shall be timely if they are postmarked by U.S. Mail on or before the deadline.</p>
Days	<p>“Days” shall mean District business days, unless otherwise noted. In calculating timelines under this policy, the day a document is filed is “day zero.” The following business day is “day one.”</p>
Representative	<p>“Representative” shall mean any person who or an organization that does not claim the right to strike and is designated by the employee to represent him or her in the complaint process.</p> <p>The employee may designate a representative through written notice to the District at any level of this process. The representative may participate in person or by telephone conference call. If the employee designates a representative with fewer than three days’ notice to the District before a scheduled conference or hearing, the District may reschedule the conference or hearing to a later date, if desired, in order to include the District’s counsel. The District may be represented by counsel at any level of the process.</p>
Consolidating Complaints	<p>Complaints arising out of an event or a series of related events shall be addressed in one complaint. Employees shall not file separate or serial complaints arising from any event or series of events that have been or could have been addressed in a previous complaint.</p> <p>When two or more complaints are sufficiently similar in nature and remedy sought to permit their resolution through one proceeding, the District may consolidate the complaints.</p>
Untimely Filings	<p>All time limits shall be strictly followed unless modified by mutual written consent.</p> <p>If a complaint form or appeal notice is not timely filed, the complaint may be dismissed, on written notice to the employee, at any point during the complaint process. The employee may appeal the dismissal by seeking review in writing within ten days from the date of the written dismissal notice, starting at the level at which the complaint was dismissed. Such appeal shall be limited to the issue of timeliness.</p>
Costs Incurred	<p>Each party shall pay its own costs incurred in the course of the complaint.</p>

Complaint and
Appeal Forms

Complaints and appeals under this policy shall be submitted in writing on a form provided by the District.

Copies of any documents that support the complaint should be attached to the complaint form. If the employee does not have copies of these documents, they may be presented at the Level One conference. After the Level One conference, no new documents may be submitted by the employee unless the employee did not know the documents existed before the Level One conference.

A complaint or appeal form that is incomplete in any material aspect may be dismissed but may be refiled with all the required information if the refile is within the designated time for filing.

Audio Recording

As provided by law, an employee shall be permitted to make an audio recording of a conference or hearing under this policy at which the substance of the employee's complaint is discussed. The employee shall notify all attendees present that an audio recording is taking place.

Level One

Complaint forms must be filed:

1. Within 15 days of the date the employee first knew, or with reasonable diligence should have known, of the decision or action giving rise to the complaint or grievance; and
2. With the lowest level administrator who has the authority to remedy the alleged problem.

In most circumstances, employees on a school campus shall file Level One complaints with the campus principal; other District employees shall file Level One complaints with their immediate supervisor.

If the only administrator who has authority to remedy the alleged problem is the Superintendent or designee, the complaint may begin at Level Two following the procedure, including deadlines, for filing the complaint form at Level One.

If the complaint is not filed with the appropriate administrator, the receiving administrator must note the date and time the complaint form was received and immediately forward the complaint form to the appropriate administrator.

The appropriate administrator shall investigate as necessary and schedule a conference with the employee within ten days after receipt of the written complaint. The administrator may set reasonable time limits for the conference.

Absent extenuating circumstances, the administrator shall provide the employee a written response within ten days following the conference. In reaching a decision, the administrator may consider information provided at the Level One conference and any other relevant documents or information the administrator believes will help resolve the complaint.

Level Two

If the employee did not receive the relief requested at Level One or if the time for a response has expired, the employee may request a conference with the Superintendent or designee to appeal the Level One decision.

The appeal notice must be filed in writing, on a form provided by the District, within ten days of the date of the written Level One response or, if no response was received, within ten days of the Level One response deadline.

After receiving notice of the appeal, the Level One administrator shall prepare and forward a record of the Level One complaint to the Level Two administrator. The employee may request a copy of the Level One record.

The Level One record shall include:

1. The original complaint form and any attachments.
2. All other documents submitted by the employee at Level One.
3. The written response issued at Level One and any attachments.
4. All other documents relied upon by the Level One administrator in reaching the Level One decision.

The Superintendent or designee shall schedule a conference within ten days after the appeal notice is filed. The conference shall be limited to the issues and documents considered at Level One. At the conference, the employee may provide information concerning any documents or information relied upon by the administration for the Level One decision. The Superintendent or designee may set reasonable time limits for the conference.

The Superintendent or designee shall provide the employee a written response within ten days following the conference. In reaching a decision, the Superintendent or designee may consider the Level One record, information provided at the Level Two conference, and any other relevant documents or information the Superintendent or designee believes will help resolve the complaint.

Recordings of the Level One and Level Two conferences, if any, shall be maintained with the Level One and Level Two records.

Level Three

If the employee did not receive the relief requested at Level Two or if the time for a response has expired, the employee may appeal the decision to the Board.

The appeal notice must be filed in writing, on a form provided by the District, within ten days of the date of the written Level Two response or, if no response was received, within ten days of the Level Two response deadline.

The Superintendent or designee shall inform the employee of the date, time, and place of the Board meeting at which the complaint will be on the agenda for presentation to the Board.

The Superintendent or designee shall provide the Board the record of the Level Two appeal. The employee may request a copy of the Level Two record.

The Level Two record shall include:

1. The Level One record.
2. The notice of appeal from Level One to Level Two.
3. The written response issued at Level Two and any attachments.
4. All other documents relied upon by the administration in reaching the Level Two decision.

The appeal shall be limited to the issues and documents considered at Level Two, except that if at the Level Three hearing the administration intends to rely on evidence not included in the Level Two record, the administration shall provide the employee notice of the nature of the evidence at least three days before the hearing.

The District shall determine whether the complaint will be presented in open or closed meeting in accordance with the Texas Open Meetings Act and other applicable law. [See BE]

The presiding officer may set reasonable time limits and guidelines for the presentation, including an opportunity for the employee and administration to each make a presentation and provide rebuttal and an opportunity for questioning by the Board. The Board shall hear the complaint and may request that the administration provide an explanation for the decisions at the preceding levels.

In addition to any other record of the Board meeting required by law, the Board shall prepare a separate record of the Level Three presentation. The Level Three presentation, including the presentation by the employee or the employee's representative, any presentation from the administration, and questions from the Board

with responses, shall be recorded by audio recording, video/audio recording, or court reporter.

The Board shall then consider the complaint. It may give notice of its decision orally or in writing at any time up to and including the next regularly scheduled Board meeting. If the Board does not make a decision regarding the complaint by the end of the next regularly scheduled meeting, the lack of a response by the Board upholds the administrative decision at Level Two.

General Education

Consistent with ~~TEA's~~the Texas Education Agency (TEA) *Student Attendance Accounting Handbook (SAAH)*, a student may be eligible for general education homebound services if the student is to be confined for a minimum of four weeks to a hospital or homebound setting for medical or psychological reasons specifically documented by a physician licensed to practice in the United States. The weeks of confinement need not be consecutive. The parent's request for services shall be submitted to the principal in accordance with TEA's *SAAH* and administrative procedures.

The principal or designee shall convene a placement committee composed of at least a campus administrator, a teacher of the student, and the parent or guardian of the student to consider the necessity of providing general education homebound instruction to the student. If the committee determines that such instruction is appropriate, the committee shall determine the type and amount of instruction to be provided and, if applicable, the length of the transition period to the school-based setting based on current ~~medical~~ information regarding the medical or psychological condition.

Special Education

Consistent with state rule and the *SAAH*, a student receiving special education services may be eligible for special education homebound services if the student is to be confined for a minimum of four weeks to a hospital or homebound setting for medical or psychological reasons specifically documented by a physician licensed to practice in the United States. ~~If a student is chronically ill, the student's admission, review, and dismissal (ARD) committee shall determine whether the~~The weeks of confinement need ~~to not~~ be consecutive.

~~If the ARD~~If a student's admission, review, and dismissal committee determines that homebound instruction is appropriate, the committee shall determine the type and amount of instruction to be provided in accordance with law, and, if applicable, the length of the transition period to the school-based setting based on current ~~medical~~ information regarding the medical or psychological condition.

Documentation of Services

The District shall maintain full documentation about students receiving homebound services, in accordance with administrative procedures, the *SAAH*, and a student's individualized education program ~~(IEP)~~, as applicable.

Note: For information related to the selection process and accounting of instructional materials, as this term is defined by state law and rule, see CMD and EFA.

The District shall provide a wide range of instructional resources for students and faculty that present varying levels of difficulty, diversity of appeal, and a variety of points of view. Although professional staff members may select instructional resources for their use in accordance with District policy and administrative regulations, the ultimate authority for determining and approving the curriculum and instructional program of the District lies with the Board.

Objectives

In this policy, “instructional resources” may include textbooks, library acquisitions, supplementary resources for classroom use, and any other instructional resources, including electronic resources, used for formal or informal teaching and learning purposes. The primary objectives of instructional resources are to implement, enrich, and support the District’s educational program.

The Board shall rely on District professional staff to select and acquire instructional resources that:

1. Enrich and support the curriculum, taking into consideration students’ varied interests, abilities, learning styles, and maturity levels.
2. Stimulate growth in factual knowledge, enjoyment of reading, literary appreciation, aesthetic values, and societal standards.
3. Present various sides of controversial issues so that students have an opportunity to develop, under guidance, skills in critical analysis and in making informed judgments in their daily lives.
4. Represent many ethnic, religious, and cultural groups and their contributions to the national heritage and world community.
5. Provide a wide range of background information that will enable students to make intelligent judgments in their daily lives.

Selection Criteria

In the selection of instructional resources, professional staff shall ensure that the resources:

1. Support and are consistent with the general educational goals of the state and District and the aims and objectives of individual schools and specific courses consistent with the District and campus improvement plans.

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- ~~2.—Meet high standards for artistic quality and/or literary style, authenticity, educational significance, factual content, physical format, presentation, readability, and technical quality.~~
- ~~3.—Are appropriate for the subject area and for the age, ability level, learning styles, and social and emotional development of the students for whom they are selected.~~
- ~~4.—Are designed to help students gain an awareness of our pluralistic society.~~
- ~~5.—Are designed to provide information that will motivate students and staff to examine their own attitudes and behavior; to understand their duties, responsibilities, rights, and privileges as citizens participating in our society; and to make informed choices in their daily lives.~~
- ~~6.—For library selections, are integral to the instructional program, are appropriate for the reading levels and understanding of students, reflect the interests and needs of the students and faculty, are included because of their literary or artistic value and merit, and present information with the greatest degree of accuracy and clarity.~~

~~Administrators, teachers, library media specialists, other District personnel, parents, and community members, as appropriate, may recommend instructional resources for selection. Gifts of instructional resources shall be evaluated according to these criteria and accepted or rejected in accordance with CDG(LOCAL).~~

~~Selection of resources is an ongoing process that includes the removal of resources no longer appropriate and the periodic replacement or repair of resources that still have educational value.~~

Controversial Issues

~~District professional staff shall endeavor to maintain a balanced collection representing various views when selecting instructional resources on controversial issues. Resources shall be chosen to clarify historical and contemporary forces by presenting and analyzing intergroup tension and conflict objectively, placing emphasis on recognizing and understanding social and economic problems. [See also EMB regarding instruction about controversial issues and EHAA regarding human sexuality instruction.]~~

Challenged Resources

~~A parent of a District student, any employee, or any District resident may formally challenge an instructional resource used in the District's educational program on the basis of appropriateness.~~

~~Informal
Reconsideration~~

~~The school receiving a complaint about the appropriateness of an instructional resource shall try to resolve the matter informally using the following procedure:~~

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- ~~1.—The principal or designee shall explain the school's selection process, the criteria for selection, and the qualifications of the professional staff who selected the questioned resource.~~
- ~~2.—The principal or designee shall explain the intended educational purpose of the resource and any additional information regarding its use.~~
- ~~3.—If appropriate, the principal or designee may offer a concerned parent an alternative instructional resource to be used by that parent's child in place of the challenged resource.~~
- ~~4.—If the complainant wishes to make a formal challenge, the principal or designee shall provide the complainant a copy of this policy and a form to request a formal reconsideration of the resource.~~

~~Formal
Reconsideration~~

~~A complainant shall make any formal objection to an instructional resource on the form provided by the District and shall submit the completed and signed form to the principal. Upon receipt of the form, the principal shall appoint a reconsideration committee.~~

~~The reconsideration committee shall include at least one member of the instructional staff who has experience using the challenged resource with students or is familiar with the challenged resource's content. Other members of the committee may include District-level staff, library staff, secondary-level students, parents, and any other appropriate individuals.~~

~~All members of the committee shall review the challenged resource in its entirety. As soon as reasonably possible, the committee shall meet and determine whether the challenged resource conforms to the principles of selection set out in this policy. The committee shall prepare a written report of its findings and provide copies to the principal, the Superintendent or designee, and the complainant.~~

~~Appeal~~

~~The complainant may appeal the decision of the reconsideration committee in accordance with appropriate complaint policies, starting with the appropriate administrator. [See DGBA, FNG, and GF]~~

~~Guiding Principles~~

~~The following principles shall guide the Board and staff in responding to challenges of instructional resources:~~

- ~~1.—A complainant may raise an objection to an instructional resource used in a school's educational program, despite the fact that the professional staff selecting the resources were qualified to make the selection, followed the proper procedure, and adhered to the objectives and criteria for instructional resources set out in this policy.~~

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- ~~2.— A parent's ability to exercise control over reading, listening, or viewing matter extends only to his or her own child.~~
- ~~3.— Access to a challenged resource shall not be restricted during the reconsideration process, except the District may deny access to a child if requested by the child's parent.~~

~~The major criterion for the final decision on challenged resources is the appropriateness of the resource for its intended educational use. No challenged instructional resource shall be removed solely because of the ideas expressed therein.~~

Note: For information related to the accounting of instructional materials, as this term is defined by state law and rule, see CMD.

For information related to the selection process of library materials, see EFB.

The District shall provide instructional materials designed to teach the Texas Essential Knowledge and Skills and further the District's educational mission. Although the Superintendent shall ensure that professional staff select instructional materials in accordance with District policy and administrative regulations, the ultimate authority for determining and approving the curriculum and instructional program of the District lies with the Board.

Objectives

In this policy, "instructional materials" may include textbooks, supplementary resources for classroom use, and any other instructional resources, including electronic resources, used for formal or informal teaching and learning purposes. The primary objectives of instructional materials are to implement, enrich, and support the District's educational program.

Selection

Instructional materials that are textbooks and related supplemental materials, which may include items from the list of resources adopted by the State Board of Education, shall be chosen in accordance with administrative regulations and the objectives above.

The Board shall rely on District professional staff to select and acquire instructional materials that:

1. Enrich and support the curriculum consistent with the general educational goals of the state and District, the aims and objectives of individual schools and specific courses, and the District and campus improvement plans.
2. Are appropriate for the subject area and for the age, ability level, learning styles, interests, and social and emotional development of the students for whom they are selected.
3. Meet high standards for artistic quality, literary style, authenticity, educational significance, factual content, physical format, presentation, readability, and technical quality.
4. Present various sides of controversial issues so that students have an opportunity to develop, under guidance, skills in critical analysis and in making informed judgments in their daily lives. [See also EMB regarding instruction about controversial issues.]
5. Promote literacy.

District professional staff may select additional instructional materials in accordance with administrative regulations and the criteria above.

Administrators, teachers, other District personnel, parents, and community members, as appropriate, may recommend instructional materials for selection. Gifts of instructional materials shall be evaluated according to these criteria and accepted or rejected in accordance with CDC(LOCAL).

Selection of instructional materials is an ongoing process that includes the removal of materials no longer appropriate and the periodic replacement or repair of materials that still have educational value.

Reconsideration of Instructional Materials

A District employee or a parent or guardian of a District student may request reconsideration of instructional material used in the District's educational program on the basis that the instructional material fails to meet the standards set forth in this policy.

Guiding Principles

The following principles shall guide the Board and staff in responding to a request for reconsideration of instructional materials:

1. A complainant may raise an objection to an instructional material used in a school's educational program, despite the fact that the professional staff selecting the materials were qualified to make the selection, followed the proper procedure, and adhered to the objectives for instructional materials set out in this policy.
2. A parent's ability to exercise control over instruction extends only to his or her own child as set forth in Education Code Chapter 26.
3. Access to a challenged material shall not be restricted during the reconsideration process, except the District may deny access to a child if requested by the child's parent.

The major criterion for the final decision on challenged instructional materials is the appropriateness of the material for its intended educational use. No challenged instructional material shall be removed solely because of the ideas expressed therein.

Informal Reconsideration

When the District or a campus receives an objection to the appropriateness of an instructional material, the appropriate administrator shall try to resolve the matter informally. The administrator shall explain the selection process and discuss the intended educational purpose for the instructional material. If appropriate, the adminis-

trator may offer a concerned parent an alternative instructional material to be used by that parent's child in place of the challenged material.

If the complainant wishes to make a formal challenge, the administrator shall provide the complainant a copy of this policy and a form to request a formal reconsideration of the instructional material.

Formal Request for
Reconsideration

A complainant shall make any formal request to reconsider an instructional material on the form provided by the District and shall submit the completed and signed form to the principal. Upon receipt of the form, the principal shall appoint a reconsideration committee.

The reconsideration committee shall include at least one member of the instructional staff who has experience using the challenged material with students or is familiar with the challenged material's content. Other members of the committee may include District-level staff, secondary-level students, parents, and any other appropriate individuals.

All members of the committee shall review the challenged instructional material in its entirety. As soon as reasonably possible, the committee shall meet and determine whether the challenged material conforms to the principles of selection set out in this policy and whether the challenged material will continue to be used in the educational program. The committee shall prepare a written report of its findings. The Superintendent, other appropriate administrators, and the complainant shall receive copies of the report.

*Frequency of
Review*

After an instructional material has been reviewed through formal reconsideration, it shall not be reviewed again until it is evaluated in the periodic local selection process.

Appeal

The complainant may appeal the decision of the reconsideration committee in accordance with appropriate complaint policies, starting at the appropriate level. [See DGBA, FNG, and GF]

Note: For information related to the selection of instructional materials, see EFA.

The purpose of this policy is to ensure that the District provides a wide range of library materials for students and faculty that support student achievement and present varying levels of difficulty, diversity of appeal, and a variety of points of view. This policy also provides standards for collection development and the selection and evaluation of library materials.

**Collection
Development Policy**

In this policy, “library materials” may include printed and electronic library acquisitions, including online catalogs, and other ancillary or supplementary materials maintained in a campus library.

The library collection development standards shall apply to all library materials available for use or display, including material contained in school libraries, classroom libraries, and online catalogs.

In developing library collections, the District shall consider the age groups, grade levels, and access to library material by all students on a campus.

Responsibility

The District shall ensure librarians, professional library staff, and other designated professional staff trained on the proper collection development standards select and acquire library materials in accordance with state law and rules, this collection development policy, and administrative procedures.

The Superintendent shall develop administrative procedures to ensure that library collections comply with applicable law and the District’s collection development purpose and goals.

Collection
Development Goals

In addition to the requirements in state law and rules, the District’s library collections shall:

1. Present multiple viewpoints related to controversial issues [see EMB regarding instruction about controversial issues].
2. Provide a wide range of background information that will enable students to make intelligent decisions in their daily lives.
3. Include accurate and authentic factual content from authoritative sources.
4. Have a high degree of potential user appeal and interest.
5. Offer a global perspective that promotes equity of access, including print and nonprint materials such as electronic and multimedia, to meet the needs of individual learners.

6. Represent diverse viewpoints and cultures appropriate to each campus to ensure the collection embodies the unique background of its student population.

Selection and
Evaluation of
Materials

Library materials shall be selected and acquired in accordance with guidelines adopted by the Texas State Library and Archives Commission and the District standards and priorities expressed in this policy.

When selecting, acquiring, and evaluating library materials, librarians and other professional staff shall ensure that the materials:

1. Enrich and support the TEKS and the state and local curriculum, taking into consideration students' varied interests, maturity levels, abilities, and learning styles.
2. Foster growth in factual knowledge, literary appreciation, aesthetic values, and societal standards.
3. Encourage the enjoyment of reading, foster high-level thinking skills, support personal learning, and encourage discussion based on rational analysis.
4. Represent ethnic, religious, and cultural groups of the state and their contributions to the state, the nation, and the world.

The Superintendent shall ensure that administrative procedures regarding the selection of library materials consider at least two of the following factors:

1. Recommendations from students, parents or guardians, teachers, and District community members.
2. Consultation with District teachers and library staff.
3. Consultation with library staff from other districts.
4. Extensive review of the library material.
5. Context of the library material, including overall fit within the existing collection and support of District curriculum.
6. Reviews of the library material from sources such as professional journals in library science, recognized professional education or content journals with book reviews, national and state award recognition lists, library science field experts, and highly acclaimed author and literacy expert recommendations.
7. Coverage of topics, authors, series, or genres that fill gaps in the school library collection.

Access Plan

The District shall allow efficient parental access to the District's library and any available online catalogs.

Online catalogs shall be publicly available. The District shall publish information about library material titles, including how and where material can be accessed.

Each campus shall communicate the following to parents and guardians:

- Access to policies relating to school libraries and library materials;
- Consistent access to library materials and resources; and
- Opportunities for students, parents and guardians, educators, and community members to provide feedback on library materials and services.

Parental
Involvement

Parents and guardians are the primary decision makers regarding their student's access to library material. In general, a student is afforded the opportunity to self-select library materials as part of literacy development and the library program. District staff may assist a student in selecting library material; however, the ultimate determination of appropriateness remains with the student and parent or guardian. Parents and guardians are encouraged to communicate with the campus librarian and their child's teacher about special considerations regarding library materials self-selected by their student.

In accordance with state law and administrative procedures, parents or guardians may select alternative library materials for their student. [For information on parental rights regarding instructional materials and other instructional resources, see EFA(LEGAL).]

The District shall focus on maximizing transparency with parents while meeting student needs and providing enrichment opportunities with library materials. Parental involvement in library acquisition, maintenance, and campus activities is encouraged.

*Access
Procedures*

School Library

A parent or guardian who wishes to access a school's library shall first submit a request to the principal. The principal or a staff member designated by the principal shall work with the parent or guardian to determine a time to access the library that will not interfere with the delivery of instruction or disrupt student use of library services.

Online Catalog

A parent or guardian who wishes to access an online catalog shall submit a written request to the principal. The principal or a staff member designated by the principal shall respond to the request in accordance with administrative procedures.

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LIBRARY MATERIALS

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(LOCAL)

Protection from
Inappropriate
Material

Library materials shall not include “harmful material” as defined by Penal Code 43.24(a)(2); “obscene” material as defined by Penal Code 43.21(a)(1); any library material that is pervasively vulgar or educationally unsuitable as referenced in *Board of Education v. Pico*; or any other material legally prohibited from inclusion in a public school library. [See EFB(LEGAL)]

Obscene material is not protected by the First Amendment to the United States Constitution.

Library materials shall comply with the Children's Internet Protection Act (CIPA), including technology protection measures. [See CQ]

Reconsideration of
Library Material

A District employee or a parent or guardian of a District student may request the reconsideration of a library material maintained in the District's library program.

*Guiding
Principles*

The following principles shall guide the review of a request to reconsider a library material:

1. An individual may raise an objection to a library material used in the District's library program, despite the fact that the professional staff selecting the materials were qualified to make the selection, followed the proper procedure, and adhered to the objectives and criteria for library materials set out in this policy.
2. A parent's or guardian's ability to exercise control over instruction and instructional resources, including library materials, extends only to his or her own child as set forth in Education Code Chapter 26.
3. Access to a challenged material shall not be restricted during the reconsideration process, except the District may deny access to a student if requested by the student's parent or guardian.

In addition to compliance with state law and this policy, a criterion for the final decision on challenged library materials is the appropriateness of the material for its intended use. No challenged library material shall be removed solely because of the ideas expressed in the library material or the personal background of the library material's author or the personal background of the characters in the material.

*Informal
Reconsideration*

When the District or a campus receives an objection to the appropriateness of a library material, the appropriate librarian or adminis-

trator shall try to resolve the matter informally. The librarian or administrator shall explain the selection process and discuss the intended purpose for the library material.

The librarian or administrator shall offer a concerned parent or guardian an alternative library material to be used by the child in place of the material and, if requested, shall restrict the child's access to the material objected to by the parent or guardian.

If the individual wishes to make a formal challenge, the administrator shall make available to the individual a copy of this policy and a form to request a formal reconsideration of the library material.

*Formal Request
for
Reconsideration*

The District shall make a form to request reconsideration of library material available in the District's administrative office.

If an employee or a parent or guardian of a District student wishes to request reconsideration of a library material, they shall follow the procedures to complete and submit the request for reconsideration form.

After a request for reconsideration form is submitted, the form shall be provided to the Superintendent. Copies of the form shall be provided to the school librarian, the Board, and any other staff designated in administrative procedures.

*Reconsideration
Committee*

For purposes of this policy, "days" shall mean District business days, unless otherwise noted.

The principal shall appoint a reconsideration committee and notify committee members within 10 days of receiving the request for reconsideration form.

The reconsideration committee shall include the librarian and at least one member of the instructional staff who is familiar with the material's content. Other members of the committee may include District-level staff, secondary-level students, parents or guardians, and any other appropriate individuals.

Within 10 days of appointment of the committee the District shall provide members of the committee the relevant materials to review. If additional time is required to obtain and distribute the materials for review, all members of the committee shall be informed that a reasonable extension of time is needed.

All members of the committee shall review the challenged library material in its entirety and determine whether the material conforms to this policy and whether the material will continue to be available in the library. The committee shall prepare a written report of its findings.

Absent extenuating circumstances, the written report shall be provided to the administration within 60 days of the District providing the material to the committee members. In calculating timelines under this policy, the day the committee is provided the materials is "day zero." The following business day is "day one."

Extensions of time due to extenuating circumstances shall take into consideration the time necessary to convene the committee members, the amount of material being reviewed, and any other pending reconsideration requests being handled by the committee.

An extension of any deadline shall be promptly communicated to the individual who submitted the request for reconsideration.

The Superintendent, the school librarian, the individual submitting the request for reconsideration, and any other appropriate administrators shall receive a copy of the committee's report.

Appeal

An individual who submitted a request for reconsideration may appeal the decision of the reconsideration committee in accordance with appropriate complaint policies, starting at the level immediately preceding Board consideration of a complaint. [See DGBA and FNG]

Frequency of Review

After a library material has been reviewed through the reconsideration process, it shall not be reviewed again within two calendar years of the reconsideration committee's final decision.

Maintenance of Library Materials

In accordance with state guidelines and District administrative procedures, collections shall be evaluated and updated regularly based on the collections' age, relevance, diversity, and variety. The Superintendent shall ensure administrative procedures are established for regular maintenance of the library collection on each campus. Standard maintenance procedures for any library collection include repair, replacement, and removal of materials as necessary. Regular maintenance shall also include scheduled inventories of the collection. Disposal of any District-owned library materials shall be in accordance with District policy and procedures. [See C]

Gifts and Donations

The District shall accept gifts and donations of library materials with the understanding that the use and disposition of the materials and monies will be in accordance with District policy and the selection criteria noted above. [See CDC]

Policy Review

This policy shall be reviewed at least every three years and revised as necessary.

Complaints

In this policy, the terms “complaint” and “grievance” shall have the same meaning.

Other Complaint Processes

Student or parent complaints shall be filed in accordance with this policy, except as required by the policies listed below. Some of these policies require appeals to be submitted in accordance with FNG after the relevant complaint process:

1. Complaints alleging discrimination or harassment based on race, color, religion, sex, gender, national origin, age, or disability shall be submitted in accordance with [the FFH series](#).
2. Complaints concerning dating violence shall be submitted in accordance with [the FFH series](#).
3. Complaints concerning retaliation related to discrimination and harassment shall be submitted in accordance with [the FFH series](#).
4. Complaints concerning bullying or retaliation related to bullying shall be submitted in accordance with FFI.
5. Complaints concerning failure to award credit or a final grade on the basis of attendance shall be submitted in accordance with FEC.
6. Complaints concerning expulsion shall be submitted in accordance with FOD and the Student Code of Conduct.
7. Complaints concerning any final decisions of the gifted and talented selection committee regarding selection for or exit from the gifted program shall be submitted in accordance with EHBB.
8. Complaints within the scope of Section 504, including complaints concerning identification, evaluation, or educational placement of a student with a disability, shall be submitted in accordance with FB and the procedural safeguards handbook.
9. Complaints within the scope of the Individuals with Disabilities Education Act, including complaints concerning identification, evaluation, educational placement, or discipline of a student with a disability, shall be submitted in accordance with EHBAE, FOF, and the procedural safeguards handbook provided to parents of all students referred to special education.
10. Complaints concerning instructional resources shall be submitted in accordance with the EF series.

STUDENT RIGHTS AND RESPONSIBILITIES
STUDENT AND PARENT COMPLAINTS/GRIEVANCES

FNG
(LOCAL)

11. Complaints concerning a commissioned peace officer who is an employee of the District shall be submitted in accordance with [the CKE series](#).
12. Complaints concerning intradistrict transfers or campus assignment shall be submitted in accordance with FDB.
13. Complaints concerning admission, placement, or services provided for a homeless student shall be submitted in accordance with FDC.
14. Complaints concerning disputes regarding a student's eligibility for free or reduced-priced meal programs shall be submitted in accordance with COB.

Complaints regarding refusal of entry to or ejection from District property based on Education Code 37.105 shall be filed in accordance with this policy. However, the timelines shall be adjusted as necessary to permit the complainant to address the Board in person within 90 calendar days of filing the initial complaint, unless the complaint is resolved before the Board considers it. [See GKA(LEGAL)]

Notice to Students and Parents

The District shall inform students and parents of this policy through appropriate District publications.

Guiding Principles

Informal Process

The Board encourages students and parents to discuss their concerns with the appropriate teacher, principal, or other campus administrator who has the authority to address the concerns. Concerns should be expressed as soon as possible to allow early resolution at the lowest possible administrative level.

Informal resolution shall be encouraged but shall not extend any deadlines in this policy, except by mutual written consent.

Formal Process

A student or parent may initiate the formal process described below by timely filing a written complaint form.

Even after initiating the formal complaint process, students and parents are encouraged to seek informal resolution of their concerns. A student or parent whose concerns are resolved may withdraw a formal complaint at any time.

The process described in this policy shall not be construed to create new or additional rights beyond those granted by law or Board policy, nor to require a full evidentiary hearing or "mini-trial" at any level.

Freedom from Retaliation

Neither the Board nor any District employee shall unlawfully retaliate against any student or parent for bringing a concern or complaint.

STUDENT RIGHTS AND RESPONSIBILITIES
STUDENT AND PARENT COMPLAINTS/GRIEVANCES

FNG
(LOCAL)

General Provisions

Filing

Complaint forms and appeal notices may be filed by hand-delivery, by electronic communication, including email and fax, or by U.S. Mail. Hand-delivered filings shall be timely filed if received by the appropriate administrator or designee by the close of business on the deadline. Filings submitted by electronic communication shall be timely filed if they are received by the close of business on the deadline, as indicated by the date/time shown on the electronic communication. Mail filings shall be timely filed if they are post-marked by U.S. Mail on or before the deadline and received by the appropriate administrator or designated representative no more than three days after the deadline.

Scheduling
Conferences

The District shall make reasonable attempts to schedule conferences at a mutually agreeable time. If a student or parent fails to appear at a scheduled conference, the District may hold the conference and issue a decision in the student's or parent's absence.

Response

At Levels One and Two, "response" shall mean a written communication to the student or parent from the appropriate administrator. Responses may be hand-delivered, sent by electronic communication to the student's or parent's email address of record, or sent by U.S. Mail to the student's or parent's mailing address of record. Mailed responses shall be timely if they are postmarked by U.S. Mail on or before the deadline.

Days

"Days" shall mean District business days, unless otherwise noted. In calculating timelines under this policy, the day a document is filed is "day zero." The following business day is "day one."

Representative

"Representative" shall mean any person who or organization that is designated by the student or parent to represent the student or parent in the complaint process. A student may be represented by an adult at any level of the complaint.

The student or parent may designate a representative through written notice to the District at any level of this process. If the student or parent designates a representative with fewer than three days' notice to the District before a scheduled conference or hearing, the District may reschedule the conference or hearing to a later date, if desired, in order to include the District's counsel. The District may be represented by counsel at any level of the process.

Consolidating
Complaints

Complaints arising out of an event or a series of related events shall be addressed in one complaint. A student or parent shall not file separate or serial complaints arising from any event or series of events that have been or could have been addressed in a previous complaint.

STUDENT RIGHTS AND RESPONSIBILITIES
STUDENT AND PARENT COMPLAINTS/GRIEVANCES

FNG
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- Untimely Filings All time limits shall be strictly followed unless modified by mutual written consent.
- If a complaint form or appeal notice is not timely filed, the complaint may be dismissed, on written notice to the student or parent, at any point during the complaint process. The student or parent may appeal the dismissal by seeking review in writing within ten days from the date of the written dismissal notice, starting at the level at which the complaint was dismissed. Such appeal shall be limited to the issue of timeliness.
- Costs Incurred Each party shall pay its own costs incurred in the course of the complaint.
- Complaint and Appeal Forms Complaints and appeals under this policy shall be submitted in writing on a form provided by the District.
- Copies of any documents that support the complaint should be attached to the complaint form. If the student or parent does not have copies of these documents, copies may be presented at the Level One conference. After the Level One conference, no new documents may be submitted by the student or parent unless the student or parent did not know the documents existed before the Level One conference.
- A complaint or appeal form that is incomplete in any material aspect may be dismissed but may be refiled with all the required information if the refiled is within the designated time for filing.

Level One

Complaint forms must be filed:

1. Within 15 days of the date the student or parent first knew, or with reasonable diligence should have known, of the decision or action giving rise to the complaint or grievance; and
2. With the lowest level administrator who has the authority to remedy the alleged problem.

In most circumstances, students and parents shall file Level One complaints with the campus principal.

If the only administrator who has authority to remedy the alleged problem is the Superintendent or designee, the complaint may begin at Level Two following the procedure, including deadlines, for filing the complaint form at Level One.

If the complaint is not filed with the appropriate administrator, the receiving administrator must note the date and time the complaint form was received and immediately forward the complaint form to the appropriate administrator.

The appropriate administrator shall investigate as necessary and schedule a conference with the student or parent within ten days after receipt of the written complaint. The administrator may set reasonable time limits for the conference.

Absent extenuating circumstances, the administrator shall provide the student or parent a written response within ten days following the conference. In reaching a decision, the administrator may consider information provided at the Level One conference and any other relevant documents or information the administrator believes will help resolve the complaint.

Level Two

If the student or parent did not receive the relief requested at Level One or if the time for a response has expired, the student or parent may request a conference with the Superintendent or designee to appeal the Level One decision.

The appeal notice must be filed in writing, on a form provided by the District, within ten days of the date of the written Level One response or, if no response was received, within ten days of the Level One response deadline.

After receiving notice of the appeal, the Level One administrator shall prepare and forward a record of the Level One complaint to the Level Two administrator. The student or parent may request a copy of the Level One record.

The Level One record shall include:

1. The original complaint form and any attachments.
2. All other documents submitted by the student or parent at Level One.
3. The written response issued at Level One and any attachments.
4. All other documents relied upon by the Level One administrator in reaching the Level One decision.

The Superintendent or designee shall schedule a conference within ten days after the appeal notice is filed. The conference shall be limited to the issues and documents considered at Level One. At the conference, the student or parent may provide information concerning any documents or information relied upon by the administration for the Level One decision. The Superintendent or designee may set reasonable time limits for the conference.

The Superintendent or designee shall provide the student or parent a written response within ten days following the conference. In reaching a decision, the Superintendent or designee may consider

the Level One record, information provided at the Level Two conference, and any other relevant documents or information the Superintendent or designee believes will help resolve the complaint.

Recordings of the Level One and Level Two conferences, if any, shall be maintained with the Level One and Level Two records.

Level Three

If the student or parent did not receive the relief requested at Level Two or if the time for a response has expired, the student or parent may appeal the decision to the Board.

The appeal notice must be filed in writing, on a form provided by the District, within ten days of the date of the written Level Two response or, if no response was received, within ten days of the Level Two response deadline.

The Superintendent or designee shall inform the student or parent of the date, time, and place of the Board meeting at which the complaint will be on the agenda for presentation to the Board.

The Superintendent or designee shall provide the Board the record of the Level Two appeal. The student or parent may request a copy of the Level Two record.

The Level Two record shall include:

1. The Level One record.
2. The notice of appeal from Level One to Level Two.
3. The written response issued at Level Two and any attachments.
4. All other documents relied upon by the administration in reaching the Level Two decision.

The appeal shall be limited to the issues and documents considered at Level Two, except that if at the Level Three hearing the administration intends to rely on evidence not included in the Level Two record, the administration shall provide the student or parent notice of the nature of the evidence at least three days before the hearing.

The District shall determine whether the complaint will be presented in open or closed meeting in accordance with the Texas Open Meetings Act and other applicable law. [See BE]

The presiding officer may set reasonable time limits and guidelines for the presentation, including an opportunity for the student or parent and administration to each make a presentation and provide rebuttal and an opportunity for questioning by the Board. The Board

STUDENT RIGHTS AND RESPONSIBILITIES
STUDENT AND PARENT COMPLAINTS/GRIEVANCES

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shall hear the complaint and may request that the administration provide an explanation for the decisions at the preceding levels.

In addition to any other record of the Board meeting required by law, the Board shall prepare a separate record of the Level Three presentation. The Level Three presentation, including the presentation by the student or parent or the student's representative, any presentation from the administration, and questions from the Board with responses, shall be recorded by audio recording, video/audio recording, or court reporter.

The Board shall then consider the complaint. It may give notice of its decision orally or in writing at any time up to and including the next regularly scheduled Board meeting. If the Board does not make a decision regarding the complaint by the end of the next regularly scheduled meeting, the lack of a response by the Board upholds the administrative decision at Level Two.

Complaints

In this policy, the terms “complaint” and “grievance” shall have the same meaning.

Other Complaint Processes

Complaints by members of the public shall be filed in accordance with this policy, except as required by the policies listed below. Some of these policies require appeals to be submitted in accordance with GF after the relevant complaint process:

1. Complaints concerning instructional resources shall be filed in accordance with the EF series.
2. Complaints concerning a commissioned peace officer who is an employee of the District shall be filed in accordance with [the CKE series](#).

Complaints regarding refusal of entry to or ejection from District property based on Education Code 37.105 shall be filed in accordance with this policy. However, the timelines shall be adjusted as necessary to permit the complainant to address the Board in person within 90 calendar days of filing the initial complaint, unless the complaint is resolved before the Board considers it. [See GKA(LEGAL)]

Guiding Principles

Informal Process

The Board encourages the public to discuss concerns with an appropriate administrator who has the authority to address the concerns. Concerns should be expressed as soon as possible to allow early resolution at the lowest possible administrative level.

Informal resolution shall be encouraged but shall not extend any deadlines in this policy, except by mutual written consent.

Formal Process

An individual may initiate the formal process described below by timely filing a written complaint form.

Even after initiating the formal complaint process, individuals are encouraged to seek informal resolution of their concerns. An individual whose concerns are resolved may withdraw a formal complaint at any time.

The process described in this policy shall not be construed to create new or additional rights beyond those granted by law or Board policy, nor to require a full evidentiary hearing or “mini-trial” at any level.

Freedom from Retaliation

Neither the Board nor any District employee shall unlawfully retaliate against any individual for bringing a concern or complaint.

General Provisions

Filing

Complaint forms and appeal notices may be filed by hand-delivery, by electronic communication, including email and fax, or by U.S. Mail. Hand-delivered filings shall be timely filed if received by the appropriate administrator or designee by the close of business on

the deadline. Filings submitted by electronic communication shall be timely filed if they are received by the close of business on the deadline, as indicated by the date/time shown on the electronic communication. Mail filings shall be timely filed if they are post-marked by U.S. Mail on or before the deadline and received by the appropriate administrator or designated representative no more than three days after the deadline.

Scheduling
Conferences

The District shall make reasonable attempts to schedule conferences at a mutually agreeable time. If the individual fails to appear at a scheduled conference, the District may hold the conference and issue a decision in the individual's absence.

Response

At Levels One and Two, "response" shall mean a written communication to the individual from the appropriate administrator. Responses may be hand-delivered, sent by electronic communication to the individual's email address of record, or sent by U.S. Mail to the individual's mailing address of record. Mailed responses shall be timely if they are postmarked by U.S. Mail on or before the deadline.

Days

"Days" shall mean District business days, unless otherwise noted. In calculating timelines under this policy, the day a document is filed is "day zero." The following business day is "day one."

Representative

"Representative" shall mean any person who or organization that is designated by an individual to represent the individual in the complaint process.

The individual may designate a representative through written notice to the District at any level of this process. If the individual designates a representative with fewer than three days' notice to the District before a scheduled conference or hearing, the District may reschedule the conference or hearing to a later date, if desired, in order to include the District's counsel. The District may be represented by counsel at any level of the process.

Consolidating
Complaints

Complaints arising out of an event or a series of related events shall be addressed in one complaint. An individual shall not file separate or serial complaints arising from any event or series of events that have been or could have been addressed in a previous complaint.

Untimely Filings

All time limits shall be strictly followed unless modified by mutual written consent.

If a complaint form or appeal notice is not timely filed, the complaint may be dismissed, on written notice to the individual, at any point during the complaint process. The individual may appeal the dismissal by seeking review in writing within ten days from the date

of the written dismissal notice, starting at the level at which the complaint was dismissed. Such appeal shall be limited to the issue of timeliness.

Costs Incurred

Each party shall pay its own costs incurred in the course of the complaint.

Complaint and Appeal Forms

Complaints and appeals under this policy shall be submitted in writing on a form provided by the District.

Copies of any documents that support the complaint should be attached to the complaint form. If the individual does not have copies of these documents, they may be presented at the Level One conference. After the Level One conference, no new documents may be submitted by the individual unless the individual did not know the documents existed before the Level One conference.

A complaint or appeal form that is incomplete in any material aspect may be dismissed but may be refiled with all the required information if the refiling is within the designated time for filing.

Level One

Complaint forms must be filed:

1. Within 15 days of the date the individual first knew, or with reasonable diligence should have known, of the decision or action giving rise to the complaint or grievance; and
2. With the lowest level administrator who has the authority to remedy the alleged problem.

If the only administrator who has authority to remedy the alleged problem is the Superintendent or designee, the complaint may begin at Level Two following the procedure, including deadlines, for filing the complaint form at Level One.

If the complaint is not filed with the appropriate administrator, the receiving administrator must note the date and time the complaint form was received and immediately forward the complaint form to the appropriate administrator.

The appropriate administrator shall investigate as necessary and schedule a conference with the individual within ten days after receipt of the written complaint. The administrator may set reasonable time limits for the conference.

Absent extenuating circumstances, the administrator shall provide the individual a written response within ten days following the conference. In reaching a decision, the administrator may consider information provided at the Level One conference and any other relevant documents or information the administrator believes will help resolve the complaint.

Level Two

If the individual did not receive the relief requested at Level One or if the time for a response has expired, he or she may request a conference with the Superintendent or designee to appeal the Level One decision.

The appeal notice must be filed in writing, on a form provided by the District, within ten days of the date of the written Level One response or, if no response was received, within ten days of the Level One response deadline.

After receiving notice of the appeal, the Level One administrator shall prepare and forward a record of the Level One complaint to the Level Two administrator. The individual may request a copy of the Level One record.

The Level One record shall include:

1. The original complaint form and any attachments.
2. All other documents submitted by the individual at Level One.
3. The written response issued at Level One and any attachments.
4. All other documents relied upon by the Level One administrator in reaching the Level One decision.

The Superintendent or designee shall schedule a conference within ten days after the appeal notice is filed. The conference shall be limited to the issues and documents considered at Level One. At the conference, the individual may provide information concerning any documents or information relied upon by the administration for the Level One decision. The Superintendent or designee may set reasonable time limits for the conference.

The Superintendent or designee shall provide the individual a written response within ten days following the conference. In reaching a decision, the Superintendent or designee may consider the Level One record, information provided at the Level Two conference, and any other relevant documents or information the Superintendent or designee believes will help resolve the complaint.

Recordings of the Level One and Level Two conferences, if any, shall be maintained with the Level One and Level Two records.

Level Three

If the individual did not receive the relief requested at Level Two or if the time for a response has expired, he or she may appeal the decision to the Board.

The appeal notice must be filed in writing, on a form provided by the District, within ten days of the date of the written Level Two response or, if no response was received, within ten days of the Level Two response deadline.

The Superintendent or designee shall inform the individual of the date, time, and place of the Board meeting at which the complaint will be on the agenda for presentation to the Board.

The Superintendent or designee shall provide the Board the record of the Level Two appeal. The individual may request a copy of the Level Two record.

The Level Two record shall include:

1. The Level One record.
2. The notice of appeal from Level One to Level Two.
3. The written response issued at Level Two and any attachments.
4. All other documents relied upon by the administration in reaching the Level Two decision.

The appeal shall be limited to the issues and documents considered at Level Two, except that if at the Level Three hearing the administration intends to rely on evidence not included in the Level Two record, the administration shall provide the individual notice of the nature of the evidence at least three days before the hearing.

The District shall determine whether the complaint will be presented in open or closed meeting in accordance with the Texas Open Meetings Act and other applicable law. [See BE]

The presiding officer may set reasonable time limits and guidelines for the presentation, including an opportunity for the individual and administration to each make a presentation and provide rebuttal and an opportunity for questioning by the Board. The Board shall hear the complaint and may request that the administration provide an explanation for the decisions at the preceding levels.

In addition to any other record of the Board meeting required by law, the Board shall prepare a separate record of the Level Three presentation. The Level Three presentation, including the presentation by the individual or his or her representative, any presentation from the administration, and questions from the Board with responses, shall be recorded by audio recording, video/audio recording, or court reporter.

The Board shall then consider the complaint. It may give notice of its decision orally or in writing at any time up to and including the next regularly scheduled Board meeting. If the Board does not make a decision regarding the complaint by the end of the next regularly scheduled meeting, the lack of a response by the Board upholds the administrative decision at Level Two.

T-TESS Appraiser List

Presented for:

Board Action X Report/Review Only _____

Supporting documents:

None _____ Attached X Provided Later _____

Contact Person:

Michelle Ailara, Deputy Superintendent and Michelle Owen, Chief Academic Officer

Background Information:

DNA(LOCAL) requires the Board to approve a list of qualified appraisers annually. The 2024-2025 District T-TESS Appraiser List is attached.

Fiscal Implications:

None

Administrative Recommendation:

Administration recommends the approval of the 2024-2025 District T-TESS Appraiser List.

Red Oak ISD

T-TESS APPRAISER LIST

2024-2025

Administration:

Michelle Ailara	Rachael Little
Lakesha Bass	Jason Nitsch
Elizabeth Haugh	Michelle Owen
Megan Corns	Catrina Reeves
Magda Davis	Melissa Sulak
Lynn Dockery	Maricela Torres
Laura Kelly	Cristi Watts
Israel Cordero*	Thurston Lamb
Shana Owen	Rob Waller
Merilee Stone	Jennifer Jeter

Red Oak High School:

<i>Brett Haugh</i>	
Jeffrey Ellis	Cassie Joffe
Sandi Grady	Paige Patterson
Sharetha Hicks	Julie Wuerch
Jermarcus Webster*	

Red Oak Middle School:

<i>Lanoria Washington</i>	
Cristin Chaffin	Christopher Thompson
Maurice Horton	LaShonda Reid
Jed Eisel	Rondell Tucker
Brian Nelson	Nicki Morrison*

Schupmann Elementary:

<i>Ashley Jackson</i>	
Matt Northcutt	
Martha Forney	

Red Oak Elementary:

<i>Braylon Linnear</i>	
Angela Barnes	

Shields Elementary:

<i>Allyson Bell</i>	
Amanda Simone	

Eastridge Elementary:

<i>Kelly Barbe</i>	
Madelyn Hooper	

Wooden Elementary:

<i>Jessica Trezza</i>	
Aimee Friesenhahn	

DAEP:

Tonya Thompson	
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*Will need to complete AEL training or T-TESS Appraiser training before being a certified T-TESS appraiser

2024 Tax Rate Adoption

Presented for:

Board Action X Report/Review Only

Supporting documents:

None Attached X Provided Later

Contact Person:

Dr. Bill Johnston, Chief Financial Officer

Background Information:

On June 17, 2024, the District held a Public Hearing on the 2024-2025 Budget and the Proposed Tax Rate. The School Board approved the Budget at the Board Meeting that was also held on June 17th. Since the M&O tax rate is dependent on certified values that are not finalized at the time of the Budget adoption, the adoption of the tax rates was not presented in June. At the meeting, it was communicated that the approval of the 2024 tax rates would occur in August or September.

As part of the 86th Legislative Session, the Texas Property Tax Reform and Transparency Act of 2019 was passed that implemented significant changes to the setting of local tax rates. The goal of the 2019 school funding legislative changes in House Bill 3 (HB 3) was to lower school district property taxes and include any loss of tax revenue in the Foundation School Program funding.

Starting in the 2019 tax year, the Tier I component of the Maintenance and Operations (M&O) tax rate is required to be compressed if the Texas Comptroller’s determination of the statewide average growth is greater than 2.5%. This State compression is referred to as the Maximum Compressed Rate (MCR). For the 2024 tax year, the average State property growth of 2.87% and is used in the calculation, which is greater than 2.5%, so the State’s MCR decreased by \$0.0025. The Interest & Sinking tax rate was not impacted by the new law.

Districts are supposed to determine their tax revenue and any tax rate adjustments based on the July Certified property values. By the end of July, the District has to submit the July Certified Property Values from the Ellis County Appraisal District (CAD) to the Texas Education Agency (TEA) so they could determine our maximum M&O compressed tax rate, which the minimum can only be 90% of the State’s MCR.

Texas Tax Code § 26.05 states that a school district’s governing body must adopt a tax rate through official action by the end of September or sixty (60) days after the certified values have been received from the CAD, whichever is later. Based on the compression of the M&O MCR, the Red Oak ISD 2024 M&O tax rate is being reduced to \$0.7552 (a 0.3% reduction). The total tax rate that is being recommended for adoption is \$1.1033 and is approximately 0.21% less than the total 2023 tax rate of \$1.1056. The M&O tax rate for adoption has not changed from the tax rate used in the 2024-2025 Adopted Budget and the I&S tax rate is the same as what was budgeted. The District’s M&O tax rate is at the lowest compressed tax rate authorized by TEA.

As part of the Texas Property Tax Reform and Transparency Act of 2019 additional tax calculations need to be made public to taxpayers. One is the no-new-revenue tax rate. The proposed rate for adoption is higher than the no-new-revenue tax rate of \$1.01609 (previously called effective tax rate) and is the voter-approval tax rate of \$1.1033 (previously called the rollback tax rate).

The no-new-revenue tax rate is the tax rate for the 2024 tax year that would raise the same amount of property tax revenue from the same taxable properties in both the 2023 tax year and the 2024 tax year. The caveat is that the calculation does not take into consideration the growth in taxable property values between the two (2) years. The growth in property values for the same property from 2023 to 2024 is 9.7%. The voter-approved tax rate is the highest tax rate that may be adopted without holding an election to seek voter approval to increase the M&O Tier II rate.

The Red Oak ISD’s tax rate has gone down by 35.5% over the last six (6) years, including the 2024 tax year, but the overall property values in Ellis County have continued to go up due to more taxable property being developed and the escalation in the housing market. The District must adopt the tax rate approved by TEA or additional reductions in state funding will occur. In order to provide a balanced budget, based on the reduction in tax revenue, the voter-approved tax rate needs to be adopted to maintain adequate funding for the 2024-2025 school year.

If the no-new-revenue tax rate is lower than the proposed tax rate, additional language is required in the resolution to adopt the tax rate. It must state that the adopted tax rate will raise more taxes than last year’s rate and include the percent difference between the proposed M&O tax rate and the M&O no-new-revenue tax rate. The M&O no-new-revenue tax rate is 7.77% less than the proposed tax rate and the impact on a home with a taxable value of \$100,000 is \$58.70 more taxes than the no-new-revenue tax rate. This increase is due to the increase in property values, not the tax rate, which has decreased from last year.

The Ellis County Tax Office assisted the District in calculating the no-new-revenue and voter-approval tax rates. In June, the School Board designated the Chief Financial Officer as the responsible party for managing the no-new-revenue and voter-approval tax rates and then posting this information to the Ellis County’s online database.

Fiscal Implications:

Fiscal implications for setting a tax rate of \$1.1033 will generate the following estimated tax revenues:

Maintenance & Operations	\$0.7552	\$29,849,736
Interest & Sinking	\$0.3481	\$13,758,863

Administrative Recommendation:

Administration recommends adopting the Resolution Setting a Tax Rate establishing the 2024 tax rate of \$1.1033 (\$0.7552 for maintenance and operations and \$0.3481 for interest and sinking) per \$100 of property value.

I move that the property tax rate be increased by the adoption of a tax rate of 1.1033, which is effectively a 7.77% increase in the tax rate.

Resolution Setting the Tax Rate
Red Oak Independent School District
August 19, 2024

On this date, we, the School Board of Red Oak Independent School District, hereby levy or set the annual ad valorem tax rate for the 2024 year on \$100 valuation by setting specific applicable to all real, personal and mixed property situation within the District at a total of \$1.1033 to be assessed and collected by the duly specified assessor and collector as follows:

\$0.7552 for the purpose of maintenance and operation; and

\$0.3481 for the purpose of payment of principal and interest on debts.

Such taxes are to be assessed and collected by the tax officials designated by the District.

Since this year's levy to fund maintenance and operations expenditures exceeds last year's maintenance and operations tax levy, by law the following statement must be included in the resolution.

THIS TAX RATE WILL RAISE MORE TAXES FOR MAINTENANCE AND OPERATIONS THAN LAST YEAR'S TAX RATE.

THE TAX RATE WILL EFFECTIVELY BE RAISED BY 7.77 PERCENT AND WILL RAISE TAXES FOR MAINTENANCE AND OPERATIONS ON A \$100,000 HOME BY APPROXIMATELY \$58.70.

IN CERTIFICATION THEREOF:

Melanie Petersen, Board President
Red Oak Independent School District

ATTEST:

Michelle Porter, Board Secretary
Red Oak Independent School District

Fiscal Implications:

The overall Amended Budget amounts have not changed from the Adopted Budget amounts. See the attached document for additional information and details of all proposed budget components.

Administrative Recommendation:

Administration recommends the School Board approve the amended 2024-2025 Fiscal Year Budget and Appendix for the General Operating Fund, Student Nutrition Fund and Debt Service Fund as presented.

Red Oak Independent School District

2024-2025 Amended Budget

As of August 5, 2024

	2023-2024 Revised Budget	2023-2024 YTD Unaudited	2024-2025 Approved Budget	2024-2025 Amended Budget
Board Approved Funds				
Beginning Fund Balance	\$32,066,801	\$32,066,801	\$34,227,566	\$34,227,566
Ending Fund Balance	\$29,402,911	\$34,227,566	\$32,493,319	\$32,493,319
Revenues				
Tax Sources	\$43,237,203	\$39,448,237	\$43,712,752	\$43,712,752
Local Sources	3,641,050	4,129,274	3,980,972	3,470,972
State Sources	36,809,342	39,474,510	39,915,081	39,915,081
State On-Behalf	3,890,406	3,826,023	4,137,323	4,137,323
Federal Sources	3,288,000	4,028,794	3,958,000	4,468,000
Non-Operating Revenue	320,000	47,955	0	0
Total District Revenues	\$91,186,001	\$90,954,792	\$95,704,128	\$95,704,128
Expenditures by Object				
Salary (6100)	\$52,626,357	\$52,090,639	\$57,007,657	\$57,007,657
Benefits (6140)	9,867,996	9,642,549	10,643,351	10,643,351
Professional Services (6200)	4,849,949	4,227,439	3,856,538	3,856,538
Supplies & Materials (6300)	6,537,427	5,873,718	6,377,371	6,377,371
Operating Costs (6400)	1,961,951	1,832,390	2,202,594	2,202,594
Debt Service (6500)	16,915,188	13,886,117	16,743,738	16,743,738
Capital Outlay (6600)	1,091,023	1,241,175	607,126	607,126
Other Uses (8900)	0	0	0	0
Total District Expenditures	\$93,849,891	\$88,794,027	\$97,438,375	\$97,438,375
Expenditures by Function				
Instruction Services (10)	\$39,478,160	\$38,691,045	\$42,305,664	\$42,305,664
Leadership Services (20)	5,626,359	5,541,277	5,739,099	5,739,099
Support Services - Student (30)	14,876,090	14,571,641	15,381,581	15,381,581
Administrative Services (40)	3,113,065	3,091,095	3,261,349	3,261,349
Support Student (50)	11,651,615	10,974,500	11,674,273	11,674,273
Community Services (60)	1,701,414	1,670,704	1,958,671	1,958,671
Debt Services (70)	16,915,188	13,886,117	16,743,738	16,743,738
Capital Outlay (80)	53,000	0	0	0
Intergovernmental Services (90)	435,000	367,647	374,000	374,000
Non-Operating/Other Uses (00)	0	0	0	0
Total District Expenditures	\$93,849,891	\$88,794,027	\$97,438,375	\$97,438,375
Beginning Operating Fund Balance	\$21,452,243	\$21,452,243	\$23,147,750	\$23,147,750
Ending Operating Fund Balance	\$21,452,243	\$23,147,750	\$23,147,750	\$23,147,750
(Funds 198 and 199)	29.11%	32.51%	30.17%	30.17%
Publications (6491)	1,607	1,392	1,275	1,275
Lobbying (6214)	4,391	4,967	5,120	5,120

Red Oak Independent School District

2024-2025 Amended Budget

As of August 5, 2024

	2023-2024 Revised Budget	2023-2024 YTD Unaudited	2024-2025 Approved Budget	2024-2025 Amended Budget
General Operating Funds				
Beginning Fund Balance	\$21,452,243	\$21,452,243	\$23,147,750	\$23,147,750
Ending Fund Balance	\$21,452,243	\$23,147,750	\$23,147,750	\$23,147,750
Revenues				
Tax Sources	\$29,286,405	\$27,058,307	\$29,921,028	\$29,921,028
Local Sources	2,593,478	2,554,217	2,613,500	2,613,500
State Sources	36,394,342	38,245,466	38,511,064	38,511,064
State On-Behalf	3,845,406	3,789,251	4,089,823	4,089,823
Federal Sources	1,250,000	1,261,020	1,600,000	1,600,000
Non-Operating Revenue	320,000	0	0	0
Total F1XX Revenues	\$73,689,631	\$72,908,261	\$76,735,415	\$76,735,415
Expenditures				
By Object				
Salary (6100)	\$51,274,576	\$50,783,766	\$55,499,822	\$55,499,822
Benefits (6140)	9,546,105	9,334,828	10,253,232	10,253,232
Professional Services (6200)	4,756,449	4,177,354	3,805,338	3,805,338
Supplies & Materials (6300)	4,394,527	3,746,317	4,000,171	4,000,171
Operating Costs (6400)	1,922,451	1,809,007	2,183,094	2,183,094
Debt Service (6500)	725,500	448,750	448,750	448,750
Capital Outlay (6600)	1,070,023	912,734	545,008	545,008
Other Uses (8900)	0	0	0	0
Total by Object	\$73,689,631	\$71,212,754	\$76,735,415	\$76,735,415
By Function				
Instruction Services (10)	\$39,478,160	\$38,691,045	\$42,305,664	\$42,305,664
Leadership Services (20)	5,626,359	5,541,277	5,739,099	5,739,099
Support Services - Student (30)	10,905,518	10,427,736	10,973,609	10,973,609
Administrative Servies (40)	3,113,065	3,091,095	3,261,349	3,261,349
Support Student (50)	11,651,615	10,974,500	11,674,273	11,674,273
Community Services (60)	1,701,414	1,670,704	1,958,671	1,958,671
Debt Services (70)	725,500	448,750	448,750	448,750
Capital Outlay (80)	53,000	0	0	0
Intergovernmental Services (90)	435,000	367,647	374,000	374,000
Non-Operating/Other Uses (00)	0	0	0	0
Total by Function	\$73,689,631	\$71,212,754	\$76,735,415	\$76,735,415

Red Oak Independent School District

2024-2025 Amended Budget

As of August 5, 2024

	2023-2024 Revised Budget	2023-2024 YTD Unaudited	2024-2025 Approved Budget	2024-2025 Amended Budget
Child Nutrition Fund				
Beginning Fund Balance	\$1,753,484	\$1,753,484	\$1,483,174	\$1,483,174
Ending Fund Balance	\$753,484	\$1,483,174	\$483,174	\$483,174
Revenues				
Tax Sources	\$0	\$0	\$0	\$0
Local Sources	872,572	1,047,272	987,472	477,472
State Sources	15,000	21,778	15,000	15,000
State On-Behalf	45,000	36,772	47,500	47,500
Federal Sources	2,038,000	2,767,773	2,358,000	2,868,000
Non- Non-Operating Revenue	0	0	0	0
Total F240 Revenues	\$2,970,572	\$3,873,595	\$3,407,972	\$3,407,972
Expenditures				
By Object				
Salary (6100)	\$1,351,781	\$1,306,873	\$1,507,835	\$1,507,835
Benefits (6140)	321,891	307,721	390,119	390,119
Professional Services (6200)	93,500	50,085	51,200	51,200
Supplies & Materials (6300)	2,142,900	2,127,402	2,377,200	2,377,200
Operating Costs (6400)	39,500	23,384	19,500	19,500
Debt Service (6500)	0	0	0	0
Capital Outlay (6600)	21,000	328,441	62,118	62,118
Other Uses (8900)	0	0	0	0
Total by Object	\$3,970,572	\$4,143,905	\$4,407,972	\$4,407,972
By Function				
Instruction Services (10)	\$0	\$0	\$0	\$0
Leadership Services (20)	0	0	0	0
Support Services - Student (30)	3,970,572	4,143,905	4,407,972	4,407,972
Administrative Servies (40)	0	0	0	0
Support Student (50)	0	0	0	0
Community Services (60)	0	0	0	0
Debt Services (70)	0	0	0	0
Capital Outlay (80)	0	0	0	0
Intergovernmental Services (90)	0	0	0	0
Non-Operating/Other Uses (00)	0	0	0	0
Total by Function	\$3,970,572	\$4,143,905	\$4,407,972	\$4,407,972

Red Oak Independent School District

2024-2025 Amended Budget

As of August 5, 2024

	2023-2024 Revised Budget	2023-2024 YTD Unaudited	2024-2025 Approved Budget	2024-2025 Amended Budget
Debt Service Fund				
Beginning Fund Balance	\$8,861,073	\$8,861,073	\$9,596,641	\$9,596,641
Ending Fund Balance	\$7,197,183	\$9,596,641	\$8,862,394	\$8,862,394
Revenues				
Tax Sources	\$13,950,798	\$12,389,930	\$13,791,724	\$13,791,724
Local Sources	175,000	527,785	380,000	380,000
State Sources	400,000	1,207,266	1,389,017	1,389,017
State On-Behalf	0	0	0	0
Federal Sources	0	0	0	0
Non-Operating Revenue	0	47,955	0	0
Total F599 Revenues	\$14,525,798	\$14,172,936	\$15,560,741	\$15,560,741
Expenditures				
By Object				
Salary (6100)	\$0	\$0	\$0	\$0
Benefits (6140)	0	0	0	0
Professional Services (6200)	0	0	0	0
Supplies & Materials (6300)	0	0	0	0
Operating Costs (6400)	0	0	0	0
Debt Service (6500)	16,189,688	13,437,367	16,294,988	16,294,988
Capital Outlay (6600)	0	0	0	0
Other Uses (8900)	0	0	0	0
Total by Object	\$16,189,688	\$13,437,367	\$16,294,988	\$16,294,988
By Function				
Instruction Services (10)	\$0	\$0	\$0	\$0
Leadership Services (20)	0	0	0	0
Support Services - Student (30)	0	0	0	0
Administrative Services (40)	0	0	0	0
Support Student (50)	0	0	0	0
Community Services (60)	0	0	0	0
Debt Services (70)	16,189,688	13,437,367	16,294,988	16,294,988
Capital Outlay (80)	0	0	0	0
Intergovernmental Services (90)	0	0	0	0
Non-Operating/Other Uses (00)	0	0	0	0
Total by Function	\$16,189,688	\$13,437,367	\$16,294,988	\$16,294,988

2024 Tax Rate Calculation Worksheet

Form 50-859

School Districts without Chapter 313 Agreements

Appendix

Red Oak Independent School District

(972) 617-2941

School District's Name

Phone (area code and number)

109 W Red Oak Road, Red Oak, TX 75154

www.redoakisd.org

School District's Address, City, State, ZIP Code

School District's Website Address

GENERAL INFORMATION: Tax Code Section 26.04(c) requires an officer or employee designated by the governing body to calculate the no-new-revenue tax rate and voter-approval tax rate for the taxing unit. These tax rates are expressed in dollars per \$100 of taxable value calculated. The calculation process starts after the chief appraiser delivers to the taxing unit the certified appraisal roll or certified estimate of value and the estimated values of properties under protest. The designated officer or employee shall submit the rates to the governing body by August 7 or as soon thereafter as practicable. Tax Code Section 26.04(e-1) does not require school districts to certify tax rate calculations or comply with certain Tax Code notice requirements. School districts are required to provide notice regarding tax rate calculations pursuant to Education Code Chapter 44.

This worksheet is for **school districts without Chapter 313 agreements only**. School districts that have a Chapter 313 agreement should use Comptroller Form 50-884 *Tax Rate Calculation Worksheet, School Districts with Chapter 313 Agreements*.

Water districts as defined under Water Code Section 49.001(1) do not use this form. Use Comptroller Form 50-858 *Water District Voter-Approval Tax Rate Worksheet for Low Tax Rate and Developing Districts* or Comptroller Form 50-860 *Developed Water District Voter-Approval Tax Rate Worksheet*.

All other taxing units should use Comptroller Form 50-856 *Tax Rate Calculation, Taxing Units Other Than School Districts or Water Districts*.

The Comptroller's office provides this worksheet to assist taxing units in determining tax rates. The Texas Education Agency (TEA) provides detailed information on and guidance to school districts in calculating their tax rates. Please review and rely on information provided by TEA when completing this worksheet. Additionally, the information provided in this worksheet is offered as technical assistance and not legal advice. Taxing units should consult legal counsel for interpretations of law regarding tax rate preparation and adoption.

SECTION 1: No-New-Revenue Tax Rate

The no-new-revenue (NNR) tax rate enables the public to evaluate the relationship between taxes for the prior year and for the current year based on a tax rate that would produce the same amount of revenue if applied to the same properties that are taxed in both years (no new taxes). When appraisal values increase, the NNR tax rate should decrease.

Line	No-New-Revenue Tax Rate Worksheet	Amount/Rate
1.	Prior year total taxable value. Enter the amount of the prior year taxable value on the prior year tax roll today. Include any adjustments since last year's certification; exclude one-fourth and one-third over-appraisal corrections made under Tax Code Section 25.25(d) from these adjustments. Exclude any property value subject to an appeal under Chapter 42 as of July 25 (will add undisputed value in Line 6). This total includes the taxable value of homesteads with tax ceilings (will deduct in Line 2). ¹	\$ 3,738,270,123
2.	Prior year tax ceilings. Enter the prior year total taxable value of homesteads with tax ceilings. These include the homesteads of homeowners age 65 or older or disabled. ²	\$ 470,538,250
3.	Preliminary prior year adjusted taxable value. Subtract Line 2 from Line 1.	\$ 3,267,731,873
4.	Prior year total adopted tax rate.	\$ 1.105600 /\$100
5.	Prior year taxable value lost because court appeals of ARB decisions reduced prior year appraised value.	
	A. Original prior year ARB values: \$ 17,190,928	
	B. Prior year values resulting from final court decisions: - \$ 15,800,000	
	C. Prior year value loss. Subtract B from A. ³	\$ 1,390,928
6.	Prior year taxable value subject to an appeal under Chapter 42, as of July 25.	
	A. Prior year ARB certified value: \$ 90,154,381	
	B. Prior year disputed value: - \$ 13,202,476	
	C. Prior year undisputed value. Subtract B from A. ⁴	\$ 76,951,905
7.	Prior year Chapter 42-related adjusted values. Add Line 5 and 6.	\$ 78,342,833
8.	Prior year taxable value, adjusted for actual and potential court-ordered adjustments. Add Line 3 and Line 7.	\$ 3,346,074,706
9.	Prior year taxable value of property in territory the school deannexed after Jan. 1, of the prior year. Enter the prior year value of property in deannexed territory. ⁵	\$ 0

¹ Tex. Tax Code §26.012(14)

² Tex. Tax Code §26.012(14)

³ Tex. Tax Code §26.012(13)

⁴ Tex. Tax Code §26.012(13)

⁵ Tex. Tax Code §26.012(15)

Line	No-New-Revenue Tax Rate Worksheet	Amount/Rate
10.	<p>Prior year taxable value lost because property first qualified for an exemption in the current year. If the school district increased an original exemption, use the difference between the original exempted amount and the increased exempted amount. Do not include value lost due to freepport goods-in-transit, or temporary disaster exemptions. Note that lowering the amount or percentage of an existing exemption in the current year does not create a new exemption or reduce taxable value.</p> <p>A. Absolute exemptions. Use prior year market value: \$ <u>2,768,505</u></p> <p>B. Partial exemptions. Current year exemption amount or current year percentage exemption times prior year value: .. + \$ <u>110,874,517</u></p> <p>C. Value loss. Add A and B. ⁶</p>	\$ <u>113,643,022</u>
11.	<p>Prior year taxable value lost because property first qualified for agricultural appraisal (1-d or 1-d-1), timber appraisal, recreational/scenic appraisal or public access airport special appraisal in the current year. Use only properties that qualified in the current year for the first time; do not use properties that qualified in the prior year.</p> <p>A. Prior year market value. \$ <u>0</u></p> <p>B. Current year productivity or special appraised value:..... - \$ <u>0</u></p> <p>C. Value loss. Subtract B from A.</p>	\$ <u>0</u>
12.	Total adjustments for lost value. Add Lines 9, 10C and 11C.	\$ <u>113,643,022</u>
13.	Adjusted prior year taxable value. Subtract Line 12 from Line 8.	\$ <u>3,232,431,684</u>
14.	Adjusted prior year total levy. Multiply Line 4 by Line 13 and divide by \$100.	\$ <u>35,737,765</u>
15.	Taxes refunded for years preceding the prior year. Enter the amount of taxes refunded by the district for tax years preceding the prior year. Types of refunds include court decisions, Tax Code Section 25.25(b) and (c) corrections and Tax Code Section 31.11 payment errors. Do not include refunds for the prior tax year. This line applies only to tax years preceding the prior tax year. ⁸	\$ <u>292,709</u>
16.	<p>Adjusted prior year levy with refunds. Add Line 14 and Line 15. ⁹</p> <p>Note: If the governing body of the school district governs a junior college district in a county with a population of more than two million, subtract the amount of taxes the governing body dedicated to the junior college district in the prior year from the result.</p>	\$ <u>36,030,474</u>
17.	<p>Total current year taxable value on the current year certified appraisal roll today. This value includes only certified values and includes the total taxable value of homesteads with tax ceilings (will deduct in line 19). These homesteads include homeowners age 65 or older or disabled. ¹⁰</p> <p>A. Certified values.¹¹ \$ <u>4,299,069,095</u></p> <p>B. Pollution control and energy storage system exemption: Deduct the value of property exempted for the current tax year for the first time as pollution control or energy storage system property: - \$ _____</p> <p>C. Total current year value. Subtract B from A.</p>	\$ <u>4,290,868,583</u>
18.	<p>Total value of properties under protest or not included on certified appraisal roll. ¹²</p> <p>A. Current year taxable value of properties under protest. The chief appraiser certifies a list of properties still under ARB protest. The list shows the appraisal district's value and the taxpayer's claimed value, if any, or an estimate of the value if the taxpayer wins. For each of the properties under protest, use the lowest of these values. Enter the total value under protest. ¹³ \$ <u>6,690,682</u></p> <p>B. Current year value of properties not under protest or included on certified appraisal roll. The chief appraiser gives school districts a list of those taxable properties that the chief appraiser knows about but are not included in the appraisal roll certification. These properties are also not on the list of properties that are still under protest. On this list of properties, the chief appraiser includes the market value, appraised value and exemptions for the preceding year and a reasonable estimate of the market value, appraised value and exemptions for the current year. Use the lower market, appraised or taxable value (as appropriate). Enter the total value not on the roll. ¹⁴ + \$ _____</p> <p>C. Total value under protest or not certified. Add A and B.</p>	\$ <u>6,690,682</u>

⁶ Tex. Tax Code §26.012(15)
⁷ Tex. Tax Code §26.012(15)
⁸ Tex. Tax Code §26.012(13)
⁹ Tex. Tax Code §26.012(13)
¹⁰ Tex. Tax Code §26.012 and 26.04(c-2)
¹¹ Tex. Tax Code §26.012(6)
¹² Tex. Tax Code §26.01(c) and (d)
¹³ Tex. Tax Code §26.01(c)
¹⁴ Tex. Tax Code §26.01(d)
¹⁵ Tex. Tax Code §26.012(6)(B)

Line	No-New-Revenue Tax Rate Worksheet	Amount/Rate
19.	Current year tax ceilings. Enter current year total taxable value of homesteads with tax ceilings. These include the homesteads of homeowners age 65 or older or disabled. ¹⁵	\$ 514,961,767
20.	Current year total taxable value. Add Lines 17C and 18C. Subtract Line 19.	\$ 3,782,597,498
21.	Total current year taxable value of properties in territory annexed after Jan. 1, of the prior year. Include both real and personal property. Enter the current year value of property in territory annexed by the school district.	\$ 0
22.	Total current year taxable value of new improvements and new personal property located in new improvements. New means the item was not on the appraisal roll in the prior year. An improvement is a building, structure, fixture or fence erected on or affixed to land. New additions to existing improvements may be included if the appraised value can be determined. New personal property in a new improvement must have been brought into the school district after Jan. 1, of the prior year, and be located in a new improvement.	\$ 236,610,476
23.	Total adjustments to the current year taxable value. Add lines 21 and 22.	\$ 236,610,476
24.	Adjusted current year taxable value. Subtract line 23 from line 20.	\$ 3,545,987,022
25.	Current year NNR tax rate. Divide line 16 by line 24 and multiply by \$100.	\$ 1.016090 /\$100

SECTION 2: Voter-Approval Tax Rate

The voter-approval tax rate is the highest tax rate that a taxing unit may adopt without holding an election to seek voter approval of the rate. Most school districts calculate a voter-approval tax rate that is split into three separate rates.¹⁸

- Maximum Compressed Tax Rate (MCR):** A district’s maximum compressed tax rate is defined as the tax rate for the current tax year per \$100 of valuation of taxable property at which the district must levy a maintenance and operations tax to receive the full amount of the tier one allotment.¹⁹
- Enrichment Tax Rate:**²⁰ A district’s enrichment tax rate is defined as any tax effort in excess of the district’s MCR and less than \$0.17. The enrichment tax rate is divided into golden pennies and copper pennies. School districts can claim up to 8 golden pennies, not subject to compression, and 9 copper pennies which are subject to compression with any increases in the guaranteed yield.²¹
- Debt Rate:** The debt rate includes the debt service necessary to pay the school district’s debt payments in the coming year. This rate accounts for principal and interest on bonds and other debt secured by property tax revenue.

The MCR and Enrichment Tax Rate added together make up the school district’s maintenance and operations (M&O) tax rate. Districts cannot increase the district’s M&O tax rate to create a surplus in M&O tax revenue for the purpose of paying the district’s debt service.²²

If a school district adopted a tax rate that exceeded its voter-approval tax rate without holding an election to respond to a disaster in the prior year, as allowed by Tax Code Section 26.042(e), the school district may not consider the amount by which it exceeded its voter-approval tax rate (disaster pennies) in the calculation this year. This adjustment will be made in Section 4 of this worksheet.

A district must complete an efficiency audit before seeking voter approval to adopt a M&O tax rate higher than the calculated M&O tax rate, hold an open meeting to discuss the results of the audit, and post the results of the audit on the district’s website 30 days prior to the election.²³ Additionally, a school district located in an area declared a disaster by the governor may adopt a M&O tax rate higher than the calculated M&O tax rate during the two-year period following the date of the *declaration without conducting an efficiency audit*.²⁴

Districts should review information from TEA when calculating their voter-approval tax rate.

Line	Voter-Approval Tax Rate Worksheet	Amount/Rate
26.	Current year maximum compressed tax rate (MCR). TEA will publish compression rates based on district and statewide property value growth. Enter the school districts’ maximum compressed rate based on guidance from TEA. ²⁵	\$ 0.616900 /\$100
27.	Current year enrichment tax rate. Enter the greater of A and B. ²⁶	\$ 0.138300 /\$100
	A. Enter the district’s prior year enrichment tax rate, minus any required reduction under Education Code Section 48.202(f)	\$ 0.138300 /\$100
	B. \$0.05 per \$100 of taxable value	\$ 0.050000 /\$100

¹⁶ [Reserved for expansion]
¹⁷ [Reserved for expansion]
¹⁸ Tex. Tax Code §26.08(n)
¹⁹ Tex. Edu. Code §48.2551(a)(3)
²⁰ Tex. Tax Code §26.08(i) and Tex. Edu. Code §45.0032
²¹ Tex. Edu. Code §§48.202(a-1)(2) and 48.202(f)
²² Tex. Edu. Code §45.0021(a)
²³ Tex. Edu. Code §11.184(b)
²⁴ Tex. Edu. Code §11.184(b-1)
²⁵ Tex. Edu. Code §§48.255, 48.2551(b)(1) and (b)(2)
²⁶ Tex. Tax Code §26.08(n)(2)
²⁷ Tex. Edu. Code §45.003(d)

Line	Voter-Approval Tax Rate Worksheet	Amount/Rate
28.	Current year maintenance and operations (M&O) tax rate. Add Lines 26 and 27. Note: M&O tax rate may not exceed the sum of \$0.17 and the district's maximum compressed rate. ²⁷	\$ <u>0.755200</u> /\$100
29.	Total current year debt to be paid with property tax revenue. Debt means the interest and principal that will be paid on debts that: (1) Are paid by property taxes; (2) Are secured by property taxes; (3) Are scheduled for payment over a period longer than one year; and (4) Are not classified in the school district's budget as M&O expenses. A. Debt includes contractual payments to other school districts that have incurred debt on behalf of this school district, if those debts meet the four conditions above. Include only amounts that will be paid from property tax revenue. Do not include appraisal district budget payments. If the governing body of a taxing unit authorized or agreed to authorize a bond, warrant, certificate of obligation, or other evidence of indebtedness on or after Sept. 1, 2021, verify if it meets the amended definition of debt before including it here. ²⁸ Enter debt amount: \$ <u>16,294,988</u> B. Subtract unencumbered fund amount used to reduce total debt. - \$ <u>1,738,749</u> C. Subtract state aid received for paying principal and interest on debt for facilities through the existing debt allotment program and/or instructional facilities allotment program. - \$ <u>1,389,017</u> D. Adjust debt: Subtract B and C from A.	\$ <u>13,167,222</u>
30.	Certified prior year excess debt collections. Enter the amount certified by the collector. ²⁹	\$ _____
31.	Adjusted current year debt. Subtract line 30 from line 29D.	\$ <u>13,167,222</u>
32.	Current year anticipated collection rate. If the anticipated rate in A is lower than actual rates in B, C and D, enter the lowest rate from B, C and D. If the anticipated rate in A is higher than at least one of the rates in the prior three years, enter the rate from A. Note that the rate can be greater than 100%. ³⁰ A. Enter the current year anticipated collection rate certified by the collector. ³¹ <u>100.00</u> % B. Enter the 2023 actual collection rate <u>98.26</u> % C. Enter the 2022 actual collection rate <u>96.81</u> % D. Enter the 2021 actual collection rate <u>99.57</u> %	<u>100.00</u> %
33.	Current year debt adjusted for collections. Divide Line 31 by Line 32. Note: If the governing body of the school district governs a junior college district in a county with a population of more than two million, add the amount of taxes the governing body proposes to dedicate to the junior college district in the current year to the result.	\$ <u>13,167,222</u>
34.	Current year total taxable value. Enter the amount on Line 20 of the <i>No-New-Revenue Tax Rate Worksheet</i> .	\$ <u>3,782,597,498</u>
35.	Current year debt rate. Divide Line 33 by Line 34 and multiply by \$100.	\$ <u>0.348100</u> /\$100
36.	Current year voter-approval tax rate. Add Lines 28 and 35. If the school district received distributions from an equalization tax imposed under former Chapter 18, Education Code, add the NNR tax rate as of the date of the county unit system's abolition to the sum of Lines 28 and 35. ³²	\$ <u>1.103300</u> /\$100

SECTION 3: Voter-Approval Tax Rate Adjustment for Pollution Control

A school district may raise its rate for M&O funds used to pay for a facility, device or method for the control of air, water or land pollution. This includes any land, structure, building, installation, excavation, machinery, equipment or device that is used, constructed, acquired or installed wholly or partly to meet or exceed pollution control requirements. The school district's expenses are those necessary to meet the requirements of a permit issued by the Texas Commission on Environmental Quality (TCEQ). The school district must provide the tax assessor with a copy of the TCEQ letter of determination that states the portion of the cost of the installation for pollution control.

This section should only be completed by a school district that uses M&O funds to pay for a facility, device or method for the control of air, water or land pollution.

²⁸ Tex. Tax Code §26.012(7)
²⁹ Tex. Tax Code §§26.012(10) and 26.04(b)
³⁰ Tex. Tax Code §§26.04(h), (h-1) and (h-2)
³¹ Tex. Tax Code §26.04(b)
³² Tex. Tax Code §26.08(g)
³³ Tex. Tax Code §26.045(d)
³⁴ Tex. Tax Code §26.045(i)

Line	Voter-Approval Rate Adjustment for Pollution Control Requirements Worksheet	Amount/Rate
37.	Certified expenses from the Texas Commission on Environmental Quality (TCEQ). Enter the amount certified in the determination letter from TCEQ. ³⁵ The school district shall provide its tax assessor with a copy of the letter. ³⁴	\$ 0
38.	Current year total taxable value. Enter the amount on Line 20 of the <i>No-New-Revenue Tax Rate Worksheet</i> .	\$ 3,782,597,498
39.	Additional rate for pollution control. Divide line 37 by line 38 and multiply by \$100.	\$ 0.000000 /\$100
40.	Current year voter-approval tax rate, adjusted for pollution control. Add line 36 and line 39.	\$ 1.103300 /\$100

SECTION 4: Voter-Approval Tax Rate Adjustment in Year Following Disaster

If a school district adopted a tax rate that exceeded its voter-approval tax rate without holding an election to respond to a disaster in the prior year, as allowed by Tax Code Section 26.042(e), the school district may not consider the amount by which it exceeded its voter-approval tax rate in the calculation this year. ³⁵ As such, it must reduce its voter-approval tax rate for the current tax year.

This section applies to a school district in a disaster area that adopts a tax rate greater than its voter-approval tax rate without holding an election in the prior year, as provided for by Tax Code Section 26.042(e).

Line	Prior Year Disaster Adjustment Worksheet	Amount/Rate
41.	Prior year adopted tax rate. Enter the rate in Line 4 of the <i>No-New-Revenue Tax Rate Worksheet</i> .	\$ 1.105600 /\$100
42.	Prior voter-approval tax rate. If the school district adopted a tax rate above the prior year voter-approval tax rate without holding an election due to a disaster, enter the voter-approval tax rate from the prior year’s worksheet.	\$ 0.000000 /\$100
43.	Increase in the prior year tax rate due to disaster (disaster pennies). Subtract Line 42 from Line 41.	\$ 0.000000 /\$100
44.	Current year voter-approval tax rate, adjusted for prior year disaster. Subtract Line 43 from one of the following lines (as applicable): Line 36 or Line 40 (school districts with pollution control).	\$ 1.103300 /\$100

SECTION 5: Total Tax Rate

Indicate the applicable total tax rates as calculated above.

No-New-Revenue Tax Rate \$ 1.016090 /\$100
 Enter the current year NNR tax rate from Line 25.

Voter-Approval Tax Rate \$ 1.103300 /\$100
 As applicable, enter the current year voter-approval tax rate from Line 36, Line 40 or Line 44. Indicate the line number used: 36

SECTION 6: School District Representative Name and Signature

Enter the name of the person preparing the tax rate as authorized by the governing body of the school district. By signing below, you certify that you are the designated officer or employee of the school district and have calculated the tax rates in accordance with requirements in Tax Code and Education Code. ³⁶

print here → Bill Johnston, Ed.D, CPA
 Printed Name of School District Representative

sign here → 
 School District Representative

8 August 2024
 Date

³⁵ Tex. Tax Code §26.042(f) and Tex. Edu. Code §45.0032(d)
³⁶ Tex. Tax Code §26.04(c)

Assignment of Fund Balance for 2024-2025

Presented for:

Board Action _____ X _____

Report/Review Only _____

Supporting documents:

None _____

Attached _____ X _____

Provided Later _____

Contact Person:

Dr. Bill Johnston, Chief Financial Officer
Shana Owen, Executive Director of Specialized Learning

Background Information:

Every year the Federal IDEA-B Formula grant requires an amount to be set-aside for residential placement. According to the Texas Education Agency (TEA) application guidelines for the Special Education consolidated application, the applicant agency is responsible for setting aside 25% of its tentative IDEA-B formula base entitlement for residential placement cost.

Residential placement occurs when a student has special educational needs that exceed the District's ability to fulfill and it is recommended the student receive services in a private facility. The 2024-2025 IDEA-B Formula grant is being utilized for ongoing services so the portion required for residential set-aside will be allocated from fund balance. If no residential placement occurs during the 2024-2025 school year, the funds will become unassigned as a part of fund balance.

In the past, the set-aside money has not been used for residential placement.

Fiscal Implications:

\$180,000 for the Assignment of the General Fund's fund balance.

Administrative Recommendation:

Administration recommends the School Board approve the transfer of funds from Undesignated (3600) to Assigned (3590) Fund Balance for potential residential placement.

Resolution to Assign Fund Balance for 2024-2025

Red Oak Independent School District

August 19, 2024

On this date, August 19, 2024, we, the School Board of Red Oak Independent School District, hereby assign \$180,000 as set aside for residential placement.

This amount is solely to be used in the event the District is unable to fulfill the educational needs of a special education student and that student requires residential placement. The source of these funds shall be derived from the General Fund – Fund Balance.

In the event that no residential placement occurs during the 2024-2025 school year, the funds will become unassigned as a part of the fund balance.

IN CERTIFICATION THEREOF:

Melanie Petersen, Board President
Red Oak Independent School District

ATTEST:

Michelle Porter, Board Secretary
Red Oak Independent School District



Monthly Financial Report

July 2024

RED OAK ISD-TAX COLLECTIONS
Monthly Tax Collections
As of June 30, 2024

GENERAL FUND

	MONTHLY	YEAR TO DATE	BUDGET	YTD % OF BUDGET
CURRENT TAXES COLLECTED	46,202	26,814,163	29,086,405	92.19%
DELINQUENT TAX COLLECTED	2,733	244,144	200,000	122.07%
PENALTIES AND INTEREST COLLECTED	14,269	221,518	175,000	126.58%
TOTAL FUNDS COLLECTED	63,204	27,279,825	29,461,405	92.60%

DEBT SERVICE

	MONTHLY	YEAR TO DATE	BUDGET	YTD % OF BUDGET
CURRENT TAXES COLLECTED	21,231	12,303,367	13,900,798	88.51%
DELINQUENT TAX COLLECTED	1,029	86,563	50,000	173.13%
PENALTIES AND INTEREST COLLECTED	6,298	88,634	30,000	295.45%
TOTAL FUNDS COLLECTED	28,559	12,478,564	13,980,798	89.26%

TOTAL TAX COLLECTIONS	91,763	39,758,389	43,442,203	91.52%
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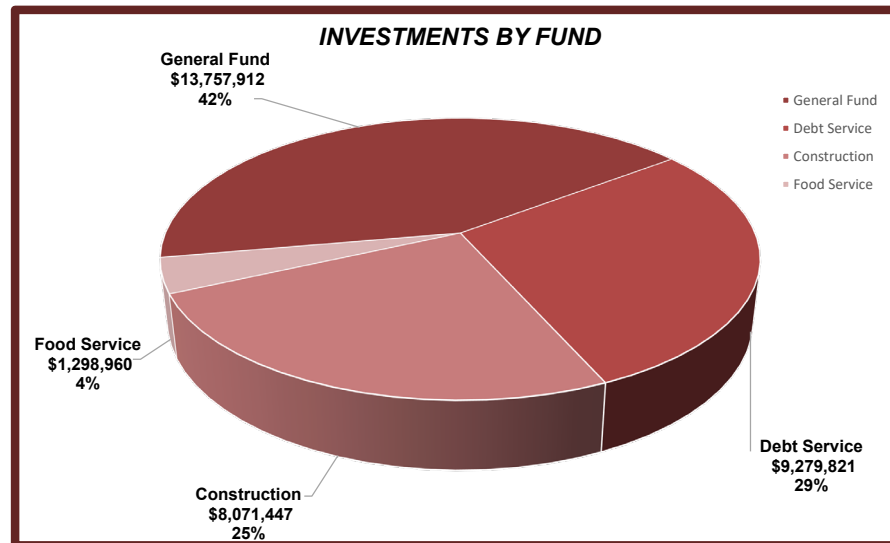
Red Oak Independent School District
Investment Summary Report
 As of June 30, 2024

INVESTMENT POOL ACCOUNTS	BEGINNING BALANCE 06/01/2024	DEPOSITS	WITHDRAWALS	INTEREST FOR MONTH	ENDING BALANCE 06/30/2024	INTEREST RATE	INTEREST YEAR TO DATE
<u>TEXSTAR</u>							
General Fund	\$ 10,616.60	\$ -	\$ -	46.31	\$ 10,662.91	5.3126%	\$ 550.27
Construction	\$ 241,192.13	\$ -	\$ -	1,052.85	\$ 242,244.98	5.3126%	\$ 1,317,244.98
<u>TEXPOOL</u>							
General/Construction Fund	2,688.14	-	-	11.70	2,699.84	5.3120%	139.14
Money Market	1,550.51	-	-	6.88	1,557.39	5.3120%	80.50
<u>FIRST PUBLIC-GOV.OVERNIGHT</u>							
General Fund	14,948,620.74	4,336,104.25	5,600,000.00	58,267.17	13,742,992.16	5.3308%	835,708.01
Debt Service	9,198,102.67	41,404.08	-	40,314.35	9,279,821.10	5.3308%	439,032.18
Construction	9,589,042.05	-	1,800,000.00	40,160.29	7,829,202.34	5.3308%	1,534,123.86
Food Service	1,591,936.41	-	300,000.00	7,023.75	1,298,960.16	5.3308%	65,465.01
TOTAL INVESTMENT POOLS	\$ 35,583,749	\$ 4,377,508	\$ 7,700,000	\$ 146,883	\$ 32,408,141		4,192,343.95

We, the approved Investment Officers of Red Oak ISD, hereby certify the Investment Report represents the investment portion of the District as of the above date in compliance with the Texas Public Funds Investment Act and Red Oak ISD Investment Policy CDA

 (signature on file)
 William Johnston, Ed.D., CPA
 Assistant Superintendent of Business Services/CFO

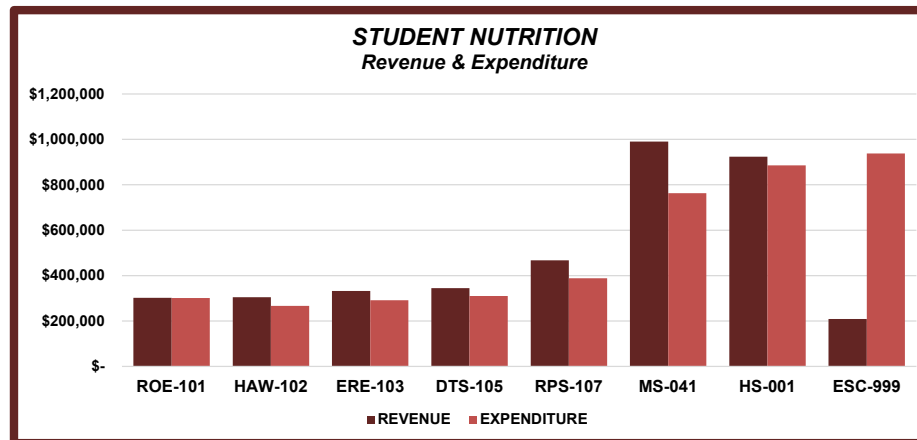
 (signature on file)
 Sandra King, RTSBA
 Finance Coordinator



Red Oak ISD - Student Nutrition
Revenue / Expenditure Detail
 As of June 30, 2024

	ROE-101	HAW-102	ERE-103	DTS-105	RPS-107	MS-041	HS-001	ESC-999	TOTAL
Average Daily Participation (ADP):				15			12		
Breakfast				663			1656	0	2,319
Lunch				1189			1401	0	2,590
Afterschool								0	-

	ROE-101	HAW-102	ERE-103	DTS-105	RPS-107	MS-041	HS-001	ESC-999	TOTAL	ORIGINAL BUDGET	% EXP TO BUDGET
57xx Local Revenue	\$ 64,840	\$ 69,577	\$ 77,488	\$ 72,814	\$ 80,271	\$ 229,258	\$ 330,337	\$ 122,686	\$ 1,047,272	\$ 872,572	120%
58xx State Matching	-	-	-	-	-	-	-	59,479	\$ 59,479	60,000	99%
5921 Federal - Breakfast	52,328	42,225	60,480	70,790	97,178	188,354	89,053	-	\$ 600,408	310,000	194%
5922 Federal - Lunch	185,189	192,984	194,265	200,887	289,684	572,917	504,421	-	\$ 2,140,347	1,505,000	142%
5923 USDA Commodities	-	-	-	-	-	-	-	-	\$ -	120,000	0%
5939/49 Other Revenue	-	-	-	-	-	-	-	27,019	\$ 27,019	103,000	26%
TOTAL REVENUE	\$ 302,357	\$ 304,786	\$ 332,233	\$ 344,491	\$ 467,133	\$ 990,530	\$ 923,810	\$ 209,184	\$ 3,874,525	\$ 2,970,572	130%
61xx Payroll	\$ 127,221	\$ 84,346	\$ 88,645	\$ 119,599	\$ 134,609	\$ 215,556	\$ 374,794	\$ 469,825	\$ 1,614,594	\$ 1,673,672	96%
62xx Contracted Services	4,029	4,812	3,082	7,759	6,750	6,500	10,000	7,153	\$ 50,085	83,200	60%
63xx Supplies	169,676	177,121	199,887	183,173	246,619	541,181	501,006	108,739	\$ 2,127,402	2,191,700	97%
64xx Travel / Miscellaneous	-	-	-	-	-	-	-	23,977	\$ 23,977	22,000	109%
66xx Capital Outlay	-	-	-	-	-	-	-	328,441	\$ 328,441	-	0%
TOTAL EXPENDITURES	\$ 300,926	\$ 266,278	\$ 291,614	\$ 310,531	\$ 387,977	\$ 763,237	\$ 885,800	\$ 938,135	\$ 4,144,498	\$ 3,970,572	104%
Other Sources (Uses)									\$ 1,589,956		
Operating Transfers In											
Revenue Over (Under) Expenditures	\$ 1,431	\$ 38,508	\$ 40,619	\$ 33,960	\$ 79,156	\$ 227,293	\$ 38,010	\$ (728,950)	\$ (269,973)	\$ (1,000,000)	



Red Oak ISD - Debt Service Fund
Revenue / Expenditure Detail
 As of June 30, 2024

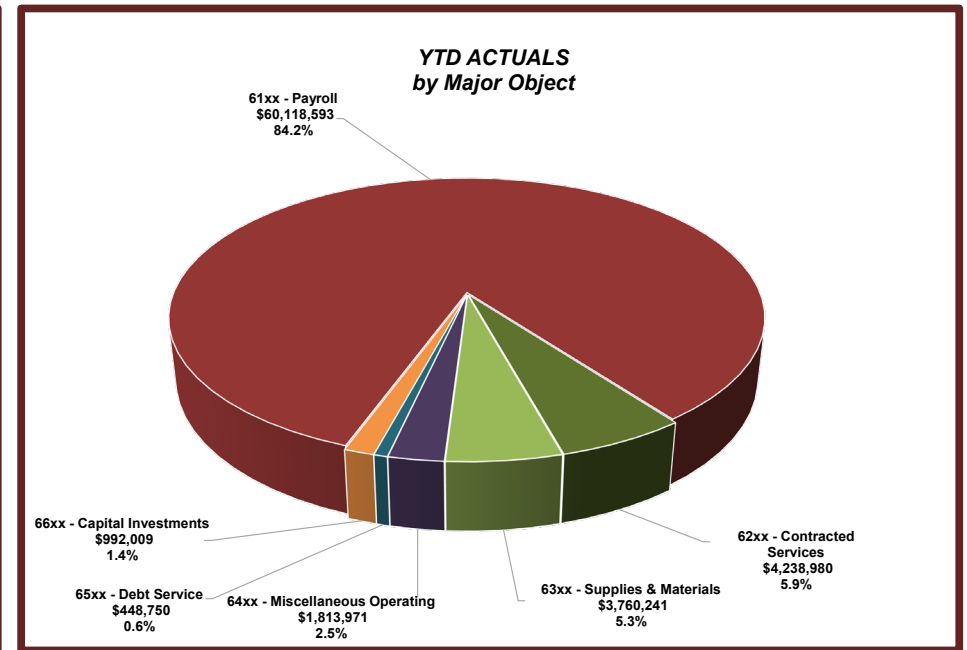
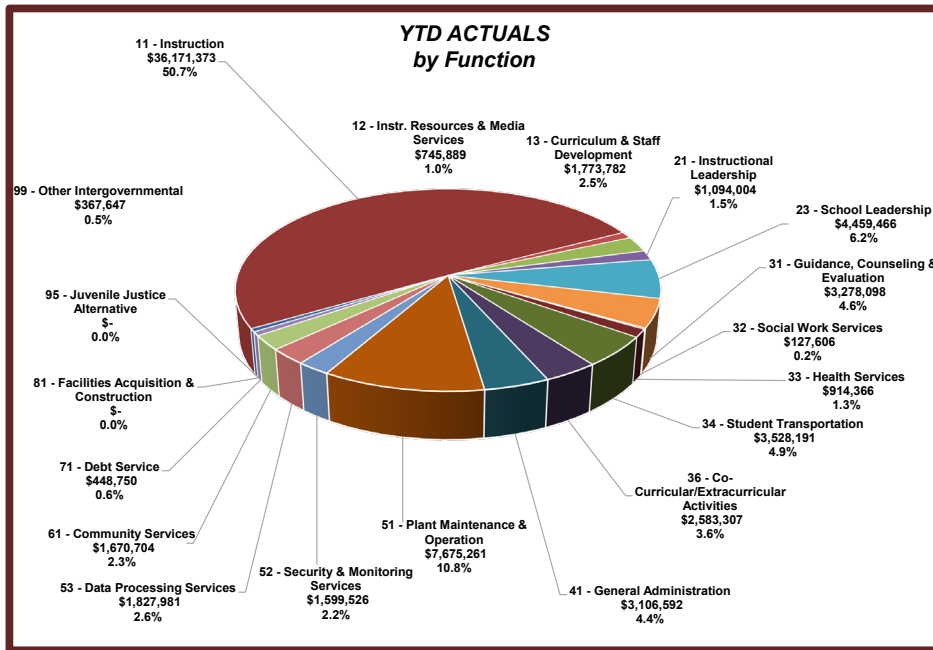
	Original Budget	YTD Actuals	Outstanding Encumbrances	Balance	% Expended to Budget
Revenues					
57xx Local	\$ 14,125,798	\$ 13,788,311	\$ -	\$ 337,487	97.61%
58xx State	400,000	-	-	400,000	0.00%
TOTAL	\$ 14,525,798	\$ 13,788,311	\$ -	\$ 737,487	94.92%
Expenditures					
71 Debt Service	\$ 16,189,688	13,437,367	\$ -	\$ 2,752,321	83.00%
TOTAL	\$ 16,189,688	\$ 13,437,367	\$ -	\$ 2,752,321	83.00%
Other Resources/(Uses)					
Issuance of Bonds	\$ -	\$ -	\$ -	\$ -	0.00%
Premium/Discount	-	-	-	-	0.00%
Escrow	-	-	-	-	0.00%
TOTAL	\$ -	\$ -	\$ -	\$ -	0.00%
Revenue Over					
(Under) Expenditures	\$ (1,663,890)	\$ 350,943	\$ -	\$ (2,014,833)	

Red Oak ISD - General Fund
Revenue/Expenditure Detail
As of June 30, 2024

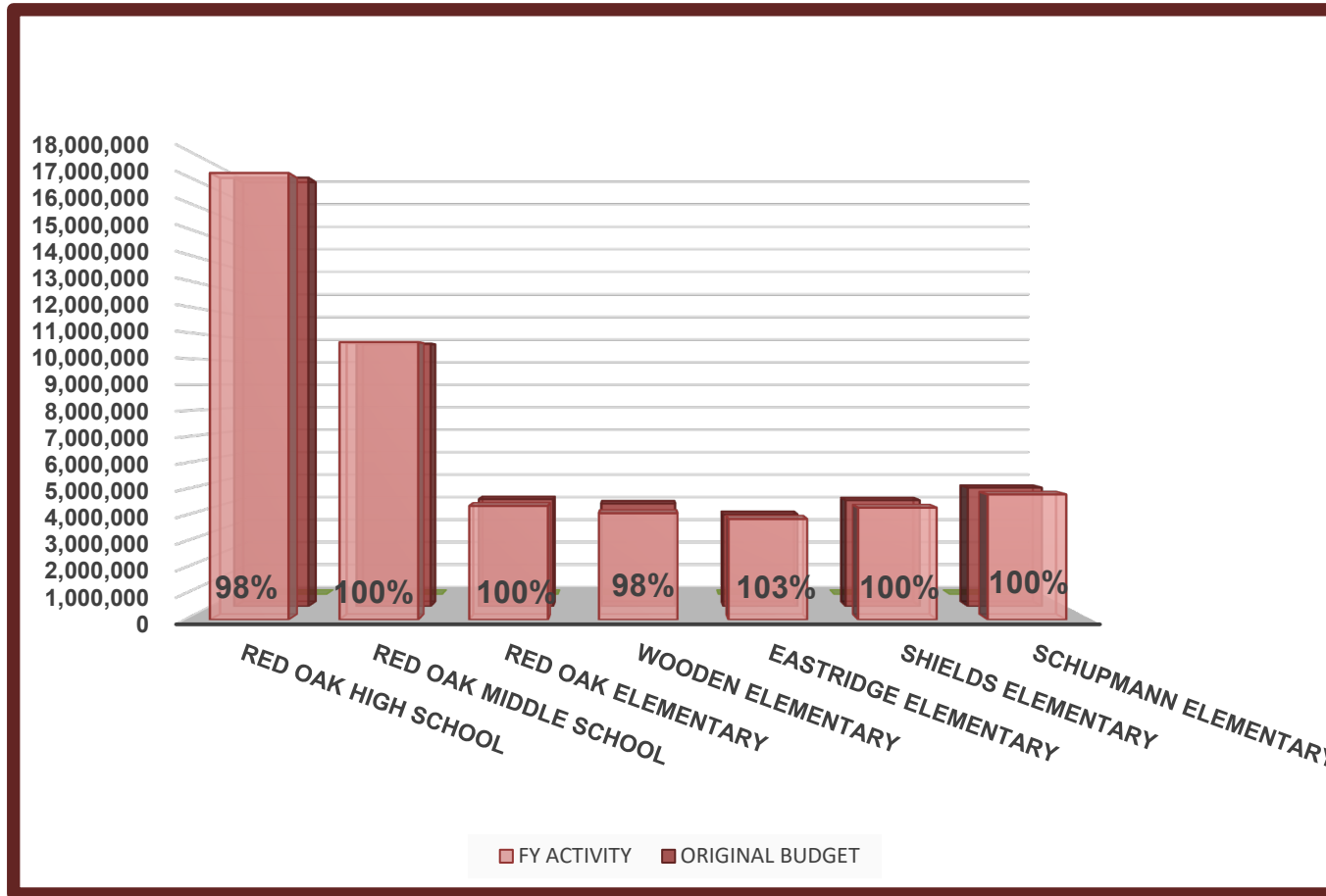
	Amended Budget	2023-2024 YTD Actuals (Unaudited)	Outstanding Encumbrances	Balance	% Expended to Budget	2022-2023 YTD Actuals (Audited)	YTD Actuals Variance
Revenues							
57xx Local	\$ 31,879,883	\$ 29,612,524	\$ -	\$ 2,267,359	92.89%	\$ 32,621,380	\$ (3,008,856)
58xx State	40,239,748	38,239,643	-	2,000,105	95.03%	33,090,775	5,148,869
59xx Federal	1,250,000	1,261,020	-	(11,020)	100.88%	3,357,062	(2,096,042)
79xx Non Operating Revenue	320,000	-	-	320,000			
TOTAL	\$ 73,689,631	\$ 69,113,187	\$ -	\$ 4,256,444	94%	\$ 69,069,217	\$ 43,970
Expenditures							
11 Instruction	\$ 36,849,589	\$ 36,171,373	\$ 55,027	\$ 623,189	98.31%	\$ 33,248,517	\$ 2,922,856
12 Instr. Resources & Media Services	780,129	745,889	-	34,240	95.61%	691,870	54,020
13 Curriculum & Staff Development	1,848,442	1,773,782	2,611	72,049	96.10%	1,811,185	(37,403)
21 Instructional Leadership	1,090,394	1,094,004	-	(3,610)	100.33%	849,599	244,405
23 School Leadership	4,535,965	4,459,466	14,164	62,335	98.63%	3,968,209	491,258
31 Guidance, Counseling & Evaluation	3,408,989	3,278,098	725	130,166	96.18%	2,749,971	528,127
32 Social Work Services	169,778	127,606	-	42,172	75.16%	124,624	2,981
33 Health Services	980,432	914,366	-	66,066	93.26%	817,259	97,107
34 Student Transportation	3,615,154	3,528,191	6,443	80,520	97.77%	3,004,280	523,912
36 Co-Curricular/Extracurricular Activities	2,731,165	2,583,307	3,681	144,177	94.72%	-	2,583,307
41 General Administration	3,113,065	3,106,592	28,264	(21,790)	100.70%	2,532,849	573,743
51 Plant Maintenance & Operation	7,907,073	7,675,261	321,995	(90,184)	101.14%	3,089,864	4,585,397
52 Security & Monitoring Services	1,733,041	1,599,526	3,111	130,404	92.48%	6,782,217	(5,182,691)
53 Data Processing Services	2,011,501	1,827,981	20,715	162,805	91.91%	1,326,650	501,331
61 Community Services	1,701,414	1,670,704	4	30,706	98.20%	1,669,232	1,473
71 Debt Service	725,500	448,750	-	276,750	61.85%	1,751,216	(1,302,466)
81 Facilities Acquisition & Construction	53,000	-	-	53,000	0.00%	448,000	(448,000)
95 Juvenile Justice Alternative	45,000	-	-	45,000	0.00%	-	-
99 Other Intergovernmental	390,000	367,647	-	22,353	94.27%	334,545	33,102
TOTAL	\$ 73,689,631	\$ 71,372,544	\$ 456,740	\$ 1,860,347	97%	\$ 65,200,086	\$ 6,172,458
Other Resources/(Uses)							
Sale of Property	\$ 0	\$ -	\$ -	\$ -	0.00%	\$ -	\$ -
	\$ 0	\$ -	\$ -	\$ 0	0%	\$ -	\$ -
Revenue Over (Under) Expenditures	\$ 0	\$ (2,259,357)	\$ (456,740)	\$ 2,396,097		\$ 3,869,131	\$ (6,128,488)

*The District reports on the modified accrual basis.

Red Oak ISD - General Fund
Revenue / Expenditure Detail
 As of June 30, 2024



Red Oak ISD - General Fund
Comparison by Campus
As of June 30, 2024





Monthly Financial Report

August 2024

RED OAK ISD-TAX COLLECTIONS
Monthly Tax Collections
As of July 31, 2024

GENERAL FUND

	MONTHLY	YEAR TO DATE	BUDGET	YTD % OF BUDGET
CURRENT TAXES COLLECTED	40,087	40,087	29,721,028	0.13%
DELINQUENT TAX COLLECTED	17,054	17,054	200,000	8.53%
PENALTIES AND INTEREST COLLECTED	19,637	19,637	200,000	9.82%
TOTAL FUNDS COLLECTED	76,777	76,777	30,121,028	0.25%

DEBT SERVICE

	MONTHLY	YEAR TO DATE	BUDGET	YTD % OF BUDGET
CURRENT TAXES COLLECTED	18,421	18,421	13,741,724	0.13%
DELINQUENT TAX COLLECTED	6,088	6,088	50,000	12.18%
PENALTIES AND INTEREST COLLECTED	7,948	7,948	30,000	26.49%
TOTAL FUNDS COLLECTED	32,457	32,457	13,821,724	0.23%

TOTAL TAX COLLECTIONS	109,234	109,234	43,942,752	0.25%
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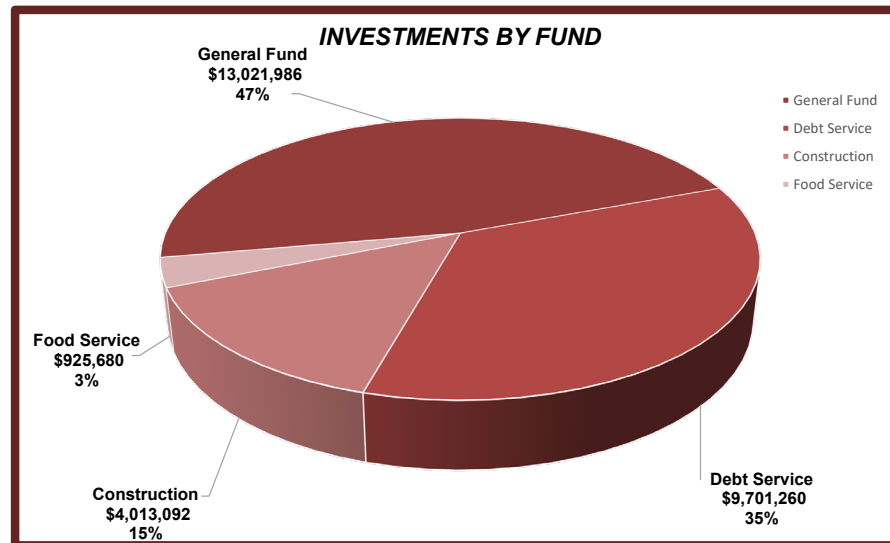
Red Oak Independent School District
Government Investment Pools
As of July 31, 2024

INVESTMENT POOL ACCOUNTS	BEGINNING BALANCE 07/01/2024	DEPOSITS	WITHDRAWALS	INTEREST FOR MONTH	ENDING BALANCE 07/31/2024	INTEREST RATE	INTEREST YEAR TO DATE
<u>TEXSTAR</u>							
General Fund	\$ 10,662.91	\$ -	\$ -	48.09	\$ 10,711.00	5.3131%	\$ 48.09
Construction	\$ 242,244.98	\$ -	\$ 242,244.00	810.51	\$ 811.49	5.3131%	\$ 810.51
<u>TEXPOOL</u>							
General/Construction Fund	2,699.84	-	-	12.09	2,711.93	5.3173%	12.09
Money Market	1,557.39	-	-	7.13	1,564.52	5.3173%	7.13
<u>FIRST PUBLIC-GOV.OVERNIGHT</u>							
General Fund	13,742,992.16	5,088,497.76	5,880,244.56	55,753.39	13,006,998.75	5.3310%	55,753.39
Debt Service	9,279,821.10	379,931.58	520.78	42,028.11	9,701,260.01	5.3310%	42,028.11
Construction	7,829,202.34	-	3,847,783.68	30,861.78	4,012,280.44	5.3310%	30,861.78
Food Service	1,298,960.16	20,405.20	400,000.00	6,315.07	925,680.43	5.3310%	6,315.07
TOTAL INVESTMENT POOLS	\$ 32,408,141	\$ 5,488,835	\$ 10,370,793	\$ 135,836	\$ 27,662,019		135,836.17

We, the approved Investment Officers of Red Oak ISD, hereby certify the Investment Report represents the government investment portion of the District as of the above date in compliance with the Texas Public Funds Investment Act and Red Oak ISD Investment Policy CDA

 (signature on file)
 William Johnston, Ed.D., CPA
 Assistant Superintendent of Business Services/CFO

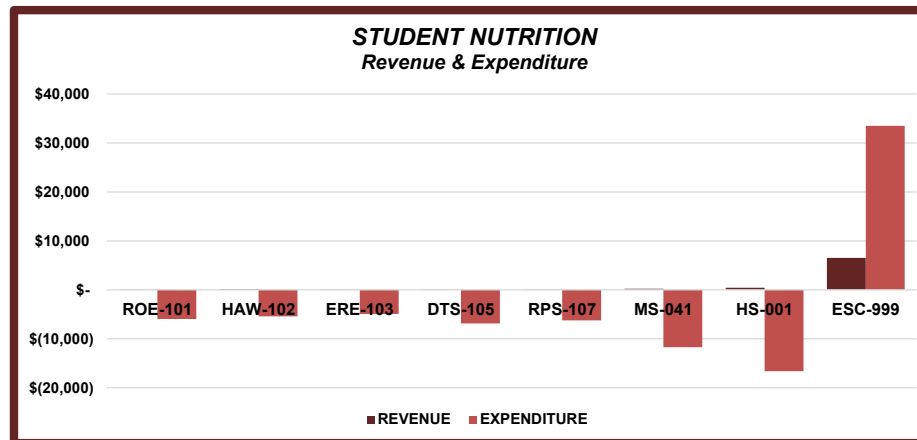
 (signature on file)
 Sandra King, RTSBA
 Finance Coordinator



Red Oak ISD - Student Nutrition
Revenue / Expenditure Detail
 As of July 31, 2024

	ROE-101	HAW-102	ERE-103	DTS-105	RPS-107	MS-041	HS-001	ESC-999	TOTAL
Average Daily Participation (ADP):									
Breakfast								0	-
Lunch								0	-
Afterschool								0	-

	ROE-101	HAW-102	ERE-103	DTS-105	RPS-107	MS-041	HS-001	ESC-999	TOTAL	ORIGINAL BUDGET	% EXP TO BUDGET
57xx Local Revenue	\$ 7	\$ 138	\$ 54	\$ 64	\$ 38	\$ 208	\$ 450	\$ 6,543	\$ 7,502	\$ 872,572	1%
58xx State Matching	-	-	-	-	-	-	-	-	\$ -	60,000	0%
5921 Federal - Breakfast	-	-	-	-	-	-	-	-	\$ -	310,000	0%
5922 Federal - Lunch	-	-	-	-	-	-	-	-	\$ -	1,505,000	0%
5923 USDA Commodities	-	-	-	-	-	-	-	-	\$ -	120,000	0%
5939/49 Other Revenue	-	-	-	-	-	-	-	-	\$ -	103,000	0%
TOTAL REVENUE	\$ 7	\$ 138	\$ 54	\$ 64	\$ 38	\$ 208	\$ 450	\$ 6,543	\$ 7,502	\$ 2,970,572	0%
61xx Payroll	\$ (6,302)	\$ (5,575)	\$ (5,204)	\$ (7,358)	\$ (6,490)	\$ (11,959)	\$ (17,651)	\$ 31,613	\$ (28,924)	\$ 1,673,672	-2%
62xx Contracted Services	369	154	271	480	237	246	1,035	-	\$ 2,791	83,200	3%
63xx Supplies	-	-	-	-	-	-	-	1,081	\$ 1,081	2,191,700	0%
64xx Travel / Miscellaneous	-	-	-	-	-	-	-	785	\$ 785	22,000	4%
66xx Capital Outlay	-	-	-	-	-	-	-	-	\$ -	-	0%
TOTAL EXPENDITURES	\$ (5,934)	\$ (5,421)	\$ (4,933)	\$ (6,878)	\$ (6,253)	\$ (11,713)	\$ (16,615)	\$ 33,479	\$ (24,267)	\$ 3,970,572	-1%
Other Sources (Uses)									\$ (2,578,810)		
Operating Transfers In											
Revenue Over (Under) Expenditures	\$ 5,941	\$ 5,559	\$ 4,987	\$ 6,942	\$ 6,291	\$ 11,921	\$ 17,065	\$ (26,936)	\$ 31,770	\$ (1,000,000)	



Red Oak ISD - Debt Service Fund
Revenue / Expenditure Detail
As of July 31, 2024

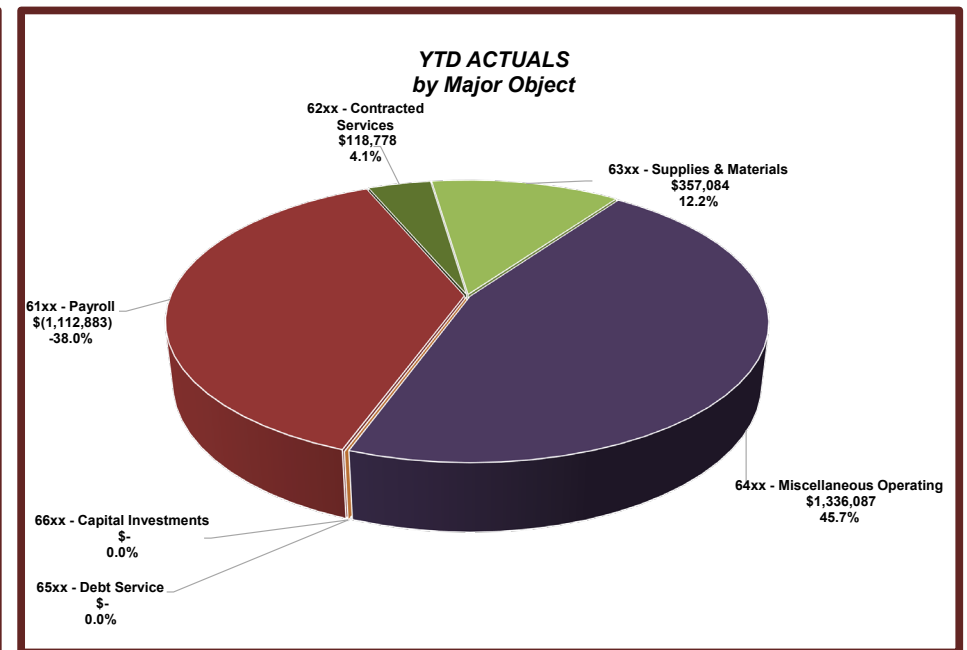
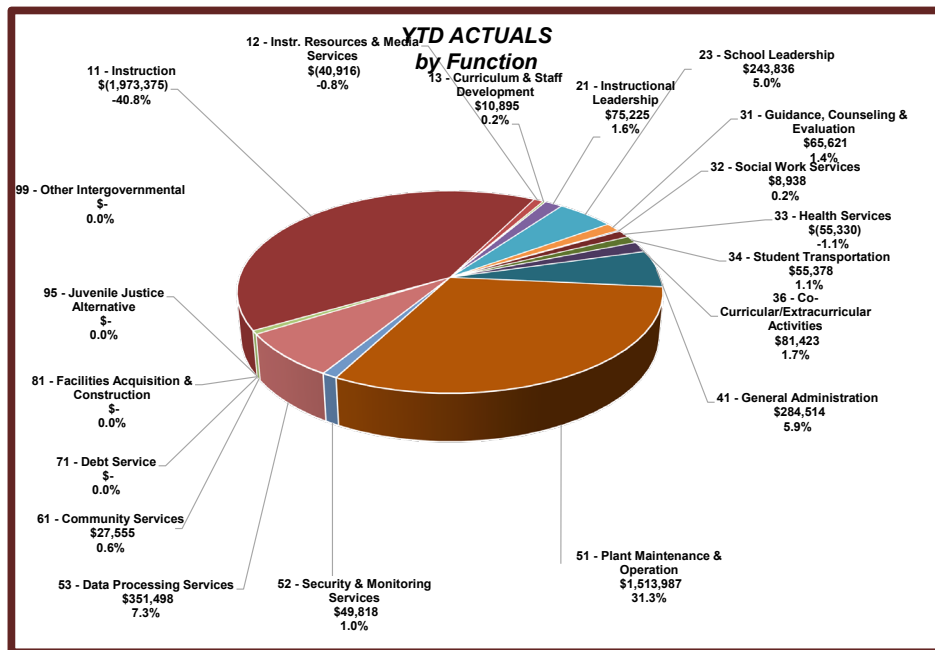
	Original Budget	YTD Actuals	Outstanding Encumbrances	Balance	% Expended to Budget
Revenues					
57xx Local	\$ 14,171,724	\$ 417,862	\$ -	\$ 13,753,862	2.95%
58xx State	1,389,017	-	-	1,389,017	0.00%
TOTAL	\$ 15,560,741	\$ 417,862	\$ -	\$ 15,142,879	2.69%
Expenditures					
71 Debt Service	\$ 16,294,988	-	-	\$ 16,294,988	0.00%
TOTAL	\$ 16,294,988	\$ -	\$ -	\$ 16,294,988	0.00%
Other Resources/(Uses)					
Issuance of Bonds	\$ -	\$ -	\$ -	\$ -	0.00%
Premium/Discount	-	-	-	-	0.00%
Escrow	-	-	-	-	0.00%
TOTAL	\$ -	\$ -	\$ -	\$ -	0.00%
Revenue Over					
(Under) Expenditures	\$ (734,247)	\$ 417,862	\$ -	\$ (1,152,109)	

Red Oak ISD - General Fund
Revenue/Expenditure Detail
As of July 31, 2024

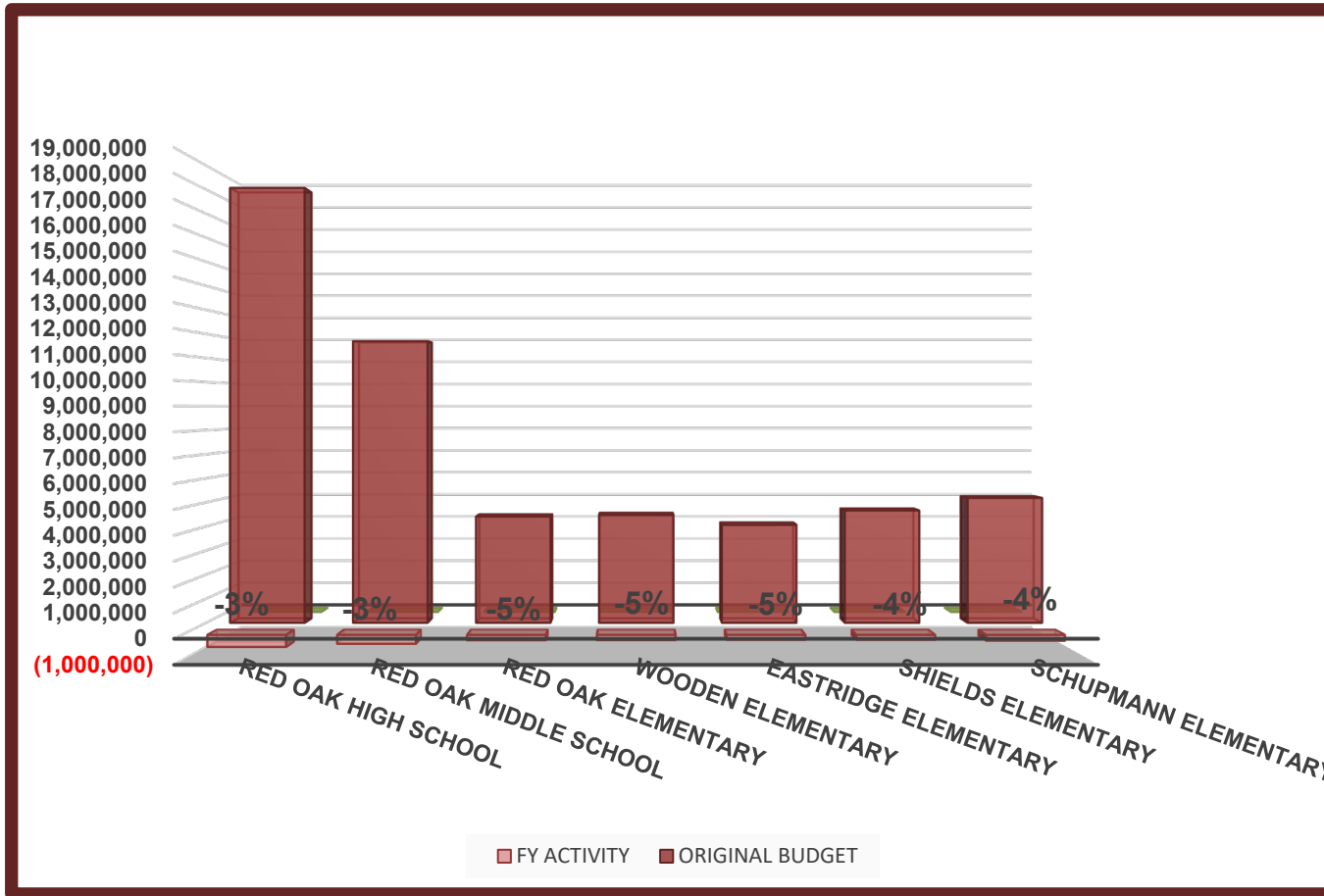
	Amended Budget	2024-2025 YTD Actuals (Unaudited)	Outstanding Encumbrances	Balance	% Expended to Budget	2023-2024 YTD Actuals (Unaudited)	YTD Actuals Variance
Revenues							
57xx Local	\$ 32,534,528	\$ 202,429	\$ -	\$ 32,332,099	0.62%	\$ 326,615	\$ (124,187)
58xx State	42,600,887	-	-	42,600,887	0.00%	268,897	(268,897)
59xx Federal	1,600,000	-	-	1,600,000	0.00%	-	-
79xx Non Operating Revenue	-	-	-	-			
TOTAL	\$ 76,735,415	\$ 202,429	\$ -	\$ 76,532,986	0%	\$ 595,513	\$ (393,084)
Expenditures							
11 Instruction	\$ 38,716,906	\$ (1,973,375)	\$ 785,170	\$ 39,905,111	-3.07%	\$ (1,560,986)	\$ (412,389)
12 Instr. Resources & Media Services	920,836	(40,916)	24,873	936,879	-1.74%	(30,952)	(9,965)
13 Curriculum & Staff Development	2,659,782	10,895	30,874	2,618,013	1.57%	14,129	(3,235)
21 Instructional Leadership	1,032,401	75,225	2,022	955,154	7.48%	79,514	(4,289)
23 School Leadership	4,706,698	243,836	17,513	4,445,349	5.55%	258,235	(14,399)
31 Guidance, Counseling & Evaluation	3,876,583	65,621	53,614	3,757,348	3.08%	44,791	20,830
32 Social Work Services	197,029	8,938	26	188,065	4.55%	9,305	(367)
33 Health Services	1,038,878	(55,330)	3,453	1,090,756	-4.99%	(34,382)	(20,949)
34 Student Transportation	3,442,777	55,378	595,923	2,791,477	18.92%	69,596	(14,218)
36 Co-Curricular/Extracurricular Activities	2,448,782	81,423	365,565	2,001,794	18.25%	90,098	(8,675)
41 General Administration	3,261,349	284,514	185,634	2,791,201	14.42%	261,000	23,514
51 Plant Maintenance & Operation	8,073,007	1,513,987	1,773,849	4,785,172	40.73%	1,335,191	178,796
52 Security & Monitoring Services	1,758,432	49,818	2,946	1,705,668	3.00%	50,702	(884)
53 Data Processing Services	1,820,534	351,498	114,433	1,354,603	25.59%	319,695	31,803
61 Community Services	1,958,671	27,555	12,340	1,918,776	2.04%	14,582	12,972
71 Debt Service	448,750	-	-	448,750	0.00%	-	-
81 Facilities Acquisition & Construction	-	-	-	-	#DIV/0!	-	-
95 Juvenile Justice Alternative	25,000	-	-	25,000	0.00%	-	-
99 Other Intergovernmental	349,000	-	394,928	(45,928)	113.16%	-	-
TOTAL	\$ 76,735,415	\$ 699,066	\$ 4,363,161	\$ 71,673,188	7%	\$ 920,521	\$ (221,455)
Other Resources/(Uses)							
Sale of Property	\$ 0	\$ -	\$ -	\$ -	0.00%	\$ -	\$ -
	\$ 0	\$ -	\$ -	\$ 0	0%	\$ -	\$ -
Revenue Over (Under) Expenditures	\$ 0	\$ (496,637)	\$ (4,363,161)	\$ 4,859,798		\$ (325,008)	\$ (171,629)

*The District reports on the modified accrual basis.

Red Oak ISD - General Fund
Revenue / Expenditure Detail
As of July 31, 2024



Red Oak ISD - General Fund
Comparison by Campus
As of July 31, 2024





Red Oak ISD
Investment Summary Report
6/1/2024 - 6/30/2024

General Ledger Grouping		Identifier	Description	Security Type	Final Maturity	Beginning Market Value	Ending Market Value	Ending Market Value + Accrued	Ending Book Value	Interest/Dividend Income	Net Amortization/Accretion	Fully Accrued Interest
CE	61747C707		MORG STAN I LQ-GV I	MMFUND	07/31/2024	15,115,975.56	337,384.14	337,384.14	337,384.14	58,752.73	0.00	58,752.73
CE	61747C707		MORG STAN I LQ-GV I	MMFUND	07/31/2024	15,115,975.56	337,384.14	337,384.14	337,384.14	58,752.73	0.00	58,752.73

General Ledger Grouping		Identifier	Description	Security Type	Final Maturity	Beginning Market Value	Ending Market Value	Ending Market Value + Accrued	Ending Book Value	Interest/Dividend Income	Net Amortization/Accretion	Fully Accrued Interest
LT	20772J3K6		CONNECTICUT ST	MUNI	08/15/2025	485,476.53	488,096.16	493,906.16	487,578.75	1,050.00	978.66	2,028.66
LT	373384TP1		GEORGIA ST	MUNI	07/01/2025	741,000.59	0.00	0.00	0.00	0.00	0.00	0.00
LT	91282CFE6		UNITED STATES TREASURY	US GOV	08/15/2025	3,426,787.11	3,444,902.34	3,495,383.10	3,442,017.24	9,314.90	4,629.17	13,944.08
LT	---	---	---	---	---	4,653,264.23	3,932,998.50	3,989,289.26	3,929,596.00	10,364.90	5,607.83	15,972.73

General Ledger Grouping		Identifier	Description	Security Type	Final Maturity	Beginning Market Value	Ending Market Value	Ending Market Value + Accrued	Ending Book Value	Interest/Dividend Income	Net Amortization/Accretion	Fully Accrued Interest
Receivable	CCYUSD		Receivable	CASH	07/31/2024	47,122.01	58,752.73	58,752.73	58,752.73	0.00	0.00	0.00
Receivable	CCYUSD		Receivable	CASH	07/31/2024	47,122.01	58,752.73	58,752.73	58,752.73	0.00	0.00	0.00

General Ledger Grouping		Identifier	Description	Security Type	Final Maturity	Beginning Market Value	Ending Market Value	Ending Market Value + Accrued	Ending Book Value	Interest/Dividend Income	Net Amortization/Accretion	Fully Accrued Interest
ST	09659BKM1		BNP Paribas New York Branch	CP	10/21/2024	1,965,844.00	1,975,868.00	1,975,868.00	1,976,645.00	0.00	8,938.33	8,938.33
ST	21687AMD2		COOPERATIVE RABOBANK U.A., NEW YORK BRANCH	CP	12/15/2024	1,950,790.00	1,961,148.00	1,961,148.00	1,961,661.11	0.00	8,869.44	8,869.44
ST	22533TH90		Credit Agricole Corporate And Investment Bank, New	CP	09/17/2024	1,976,078.00	1,985,916.00	1,985,916.00	1,986,239.44	0.00	9,076.11	9,076.11
ST	373384TP1		GEORGIA ST	MUNI	07/01/2025	0.00	745,004.88	747,598.63	744,366.17	2,593.75	-511.27	3,105.02
ST	4497W0HL5		ING (U.S.) Funding LLC	CP	08/20/2024	1,984,138.00	1,994,102.00	1,994,102.00	1,994,437.22	0.00	9,076.11	9,076.11
ST	4497W0LM8		ING (U.S.) Funding LLC	CP	11/21/2024	978,377.00	983,538.00	983,538.00	983,728.89	0.00	4,503.61	4,503.61
ST	62479LHG3		MUFG Bank, Ltd. - New York Branch	CP	08/16/2024	1,985,520.00	1,995,322.00	1,995,322.00	1,995,600.00	0.00	9,093.33	9,093.33
ST	62479LLN3		MUFG Bank, Ltd. - New York Branch	CP	11/22/2024	978,276.00	983,353.00	983,353.00	983,740.56	0.00	4,460.56	4,460.56
ST	63873JKJ8		Naitxis, New York Branch	CP	10/18/2024	983,313.00	988,309.00	988,309.00	988,625.00	0.00	4,520.83	4,520.83
ST	63873JKL4		Naitxis, New York Branch	CP	11/19/2024	1,957,224.00	1,967,330.00	1,967,330.00	1,968,100.00	0.00	8,990.00	8,990.00
ST	73723RH48		PORTSMOUTH VA	MUNI	02/01/2025	986,217.42	989,198.68	1,004,198.68	989,420.30	2,500.00	1,751.09	4,251.09
ST	89233GHK5		Toyota Motor Credit Corporation	CP	08/19/2024	1,984,486.00	1,994,346.00	1,994,346.00	1,994,740.00	0.00	9,058.89	9,058.89
ST	89233GMH6		Toyota Motor Credit Corporation	CP	12/17/2024	974,424.00	979,929.00	979,929.00	980,373.34	0.00	4,408.89	4,408.89
ST	912797KK2		UNITED STATES TREASURY	T-BILL	09/12/2024	2,968,214.22	2,981,532.99	2,981,532.99	2,982,167.50	0.00	13,162.08	13,162.08
ST	912797KP1		UNITED STATES TREASURY	T-BILL	07/16/2024	6,984,672.03	0.00	0.00	0.00	0.00	15,187.08	15,187.08
ST	9128282Y5		UNITED STATES TREASURY	US GOV	09/30/2024	992,011.72	994,726.56	1,001,867.95	994,961.09	1,799.86	2,603.44	4,403.30
ST	912828J27		UNITED STATES TREASURY	US GOV	02/15/2025	1,714,487.30	1,722,041.02	1,738,194.87	1,720,856.60	2,980.77	4,517.78	7,498.55
ST	912828J27		UNITED STATES TREASURY	US GOV	02/15/2025	979,707.03	984,023.44	993,254.21	983,740.15	1,703.30	2,522.77	4,226.06
ST	91282CD84		UNITED STATES TREASURY	US GOV	10/15/2024	690,484.38	693,423.83	694,714.81	693,537.58	370.56	2,671.13	3,041.69
ST	91282CD87		UNITED STATES TREASURY	US GOV	01/15/2025	978,046.88	982,304.69	982,824.39	982,190.58	952.39	3,293.09	4,245.48
ST	91282CD87		UNITED STATES TREASURY	US GOV	01/15/2025	1,222,558.60	1,227,880.86	1,228,530.49	1,228,060.86	1,190.49	4,057.96	5,248.45
ST	91282CED9		UNITED STATES TREASURY	US GOV	03/15/2025	1,951,992.18	0.00	0.00	0.00	2,092.39	3,806.06	5,898.45
ST	91282CED9		UNITED STATES TREASURY	US GOV	03/15/2025	1,951,992.18	0.00	0.00	0.00	2,092.39	3,727.51	5,819.90
ST	91282CEH0		UNITED STATES TREASURY	US GOV	04/15/2025	1,470,468.75	1,476,474.62	1,488,093.47	1,475,244.24	3,335.04	2,922.27	6,257.31
ST	91282CEH0		UNITED STATES TREASURY	US GOV	04/15/2025	1,470,468.75	1,476,474.62	1,488,093.47	1,476,032.67	3,335.04	2,829.97	6,165.01
ST	91282CEQ0		UNITED STATES TREASURY	US GOV	05/15/2025	1,958,867.18	1,967,226.56	1,978,884.17	1,966,996.52	4,633.15	3,473.80	8,106.95
ST	91282CEQ0		UNITED STATES TREASURY	US GOV	05/15/2025	1,175,320.31	1,180,335.94	1,187,330.50	1,179,589.04	2,779.89	2,147.91	4,927.81
ST	91282CEU1		UNITED STATES TREASURY	US GOV	06/15/2025	856,508.79	860,524.90	863,755.35	860,122.27	2,130.72	1,425.78	3,556.50
ST	---	---	---	---	---	46,070,487.72	36,090,334.58	36,091,176.10	36,091,176.10	34,489.75	151,607.10	186,096.85

General Ledger Grouping		Identifier	Description	Security Type	Final Maturity	Beginning Market Value	Ending Market Value	Ending Market Value + Accrued	Ending Book Value	Interest/Dividend Income	Net Amortization/Accretion	Fully Accrued Interest
---	---	---	---	---	---	65,886,849.51	40,419,469.94	40,573,461.11	40,416,908.97	103,607.39	157,214.93	260,822.31

PMA Asset Management, LLC, an approved Investment Officer of Red Oak ISD, hereby certifies this Investment Summary Report represents the investments we manage on behalf of the District as of the above date in compliance with the Texas Public Funds Investment Act and Red Oak ISD Investment Policy.



Red Oak ISD
Investment Summary Report
6/1/2024 - 6/30/2024

A handwritten signature in black ink, appearing to read "Brian Hextell", written over a horizontal line.

Brian Hextell
Senior vice President
Institutional Portfolio Manager
PMA Asset Management, LLC

August 13, 2024
Date

Prudent Man Advisors, LLC doing business as PMA Asset Management, LLC ("PMA") is an investment adviser registered with the U.S. Securities and Exchange Commission. This report is intended to detail investment advisory activity through your PMA advisory separately managed account (hereinafter "Account"). All transactions are reflected as of trade date. Information derived from sources other than PMA (including market value and market analytics), is believed to be accurate, but is not independently verified nor guaranteed to be accurate or complete. Accounting settings on PMA's accounting and reporting platform, provided by Cleanwater Analytics, may not reflect your internal accounting methodology. This report is not intended to be nor should it be relied upon in any way as a forecast or guarantee of future events regarding a not particular investment or the markets in general. Certain security characteristics may include assumptions including, but not limited to, expected levels of volatility, prepayment rates, default rates and recovery rates. Future market experience may differ from these assumptions. Past performance is not a guarantee of future results. As with all strategies, there is a risk of loss of all or portion of the amount invested.

Senate Bill 1517 was created during the 80th session of the Texas Legislature. The "No-Pass No-Play" statute was designed to prioritize the competing interests of high school academic performance and athletic competition. The statute requires a student participating in sports or an extra-curricular activity to be suspended from the activity upon receiving a failing grade, at the end of a reporting period. The statute also authorizes school districts to exempt certain courses from the requirements. While many school districts utilize their ability to exempt courses, others may choose not to.

Texas Administrative Code Rules specify the definition of advanced courses referred to in the Texas Education Code, which narrows the number of courses that may be exempt from "No Pass, No Play" requirements.

Texas Administrative Code Rule 74.30: Identification of Honors Courses

(a) The following are identified as Honors classes as referred to in the Texas Education Code, 33.081(d)(1), concerning extracurricular activities:

- (1) all College Board advanced placement courses and International Baccalaureate courses in all disciplines:
 - (2) English language Arts: high school/college concurrent enrollment classes that are included in the "Community College General Academic Course Guide Manual (Part One):
 - (3) Languages other than English: high school/college concurrent classes that are included in the "Community College General Academic Course Guide Manual (Part One)," and languages other than English Courses Levels IV-VII.
 - (4) Mathematics: high school/college concurrent enrollment classes that are included in the "Community College General Academic Course Guide Manual (Part One)" and Precalculus:
 - (5) Science: high school/college concurrent enrollment classes that are included in the "Community College General Academic Course Guide Manual (Part One)":
 - (6) Social Studies: Social Studies Advanced Studies, Economics Advanced Studies, and high school/college concurrent enrollment classes that are included in the "Community College General Academic Course Guide Manual (Part One)."
- (b) Districts may identify additional Honors courses in the subject areas of English language arts, mathematics, science, social studies, economics, or a language other than English for the purpose of this section, but must identify such courses prior to the semester in which any exemption related to extracurricular activities occur.

The UIL no longer requires the list of courses be submitted to the UIL for approval; the District is only required to designate such courses prior to the beginning of the school year.

Blue Font = Additions

Red Font/Strikeouts = Delete

No Pass, No Play UIL Exempt Courses

Red Oak ISD designates the following classes to be approved for the “No Pass No Play” exemption for Red Oak High School according to ROISD Policy FM (LEGAL).

English I- Honors	Physics-Honors	Dual Credit American History I & II
English II- Honors	AP Biology I & II	Dual Credit Economics
AP English Language	AP Chemistry	Dual Credit Sociology
AP English Literature & Comp	AP Physics 1	Dual Credit U.S. Government
Dual Credit English Comp & Rhetoric	AP Physics 2	Dual Credit Texas Government
Dual Credit British Lit I & II	AP Physics C	Spanish- Honors I - III
Dual Credit Speech	AP Environmental Science	AP Spanish IV
Algebra I- Honors	Dual Credit Env Science I & II	AP Spanish Literature V
Geometry- Honors	Dual Credit Biology I & II	French III-Honors
Algebra II- Honors	Dual Credit Anatomy/Phys.	AP French
Pre-Calculus Honors	World Geography- Honors	AP Computer Science
AP Calculus AB & BC	AP World History	AP Music Theory
AP Statistics	AP US History	AP Studio Art
Dual Credit College Algebra	AP US Government	Dual Credit Music Appreciation
Dual Credit Statistics	AP Macroeconomics	Dual Credit Environmental Science
Dual Credit Pre-Calculus	AP Human Geography	AP Seminar
Biology- Honors	AP Psychology	AP Research
Chemistry- Honors	Adv. Studies in Psychology	

Red Oak ISD designates the following classes to be approved for the “No Pass No Play” exemption for Red Oak Middle School

ELAR 6 th Grade- Honors	Math 8 th Grade Honors	Social Studies 8 th Grade- Honors
ELAR 7 th Grade- Honors	Algebra I- Honors	Science 6 th Grade- Honors
ELAR 8 th Grade- Honors	Geometry- Honors	Science 7 th Grade- Honors
Math 6 th Grade- Honors	Social Studies 6 th Grade- Honors	Science 8 th Grade- Honors
Math 7 th Grade- Honors	Social Studies 7 th Grade- Honors	Spanish-Honors