

Agenda of Regular
The Board of Trustees
Wimberley Independent School District

A Regular of the Board of Trustees of Wimberley Independent School District will be held September 21, 2020, beginning at 6:00 PM in the WISD Administration Building
951 FM 2325
Wimberley, TX 78676.

The meeting of the Board of Trustees will be held in conjunction with the public meeting listed above. A quorum of the Board of Trustees is not necessary as the subjects to be discussed will have no formal action taken by the Board of Trustees. Items do not have to be taken in the order shown on this meeting notice.

The Presiding Officer will:

Call the meeting to order and determine a quorum.

1. Public Forum
2. Bond update 3
3. Consent Agenda
 - A. Acceptance of Agenda
 - B. Student Enrollment, September, 2020 5
 - C. Minutes of the Regular Meeting, August 17, 2020 7
 - D. Minutes of the Called Meeting, August 10, 2020 13
 - E. Approve Bond expenditures 14
 - F. Blue Hole Primary Campus Improvement Plans FY21
 - G. Notice of the November 3, 2020 Wimberley I.S.D. Board of Trustees Election for Places 6 and 7 15
 - H. Amended Order of Election - Updated Vote Center Locations for Early Voting and Election Day, November 3, 2020 Election 18
 - I. FY21 Textbook Committee 20
 - J. Change December 2020 meeting date 21
4. Discussion regarding to partner with Wimberley Tennis Assoc in repair of tennis court lights
5. Policy Update 115 22
 - A. Including Local Policies:
 - BF: BOARD POLICIES
 - DIA: EMPLOYEE WELFARE - FREEDOM FROM DISCRIMINATION, HARASSMENT, AND RETALIATION
 - DMD: PROFESSIONAL DEVELOPMENT - PROFESSIONAL MEETINGS

AND VISITATIONS

EI: ACADEMIC ACHIEVEMENT

FB: EQUAL EDUCATIONAL OPPORTUNITY

FD: ADMISSIONS

FEB: ATTENDANCE - ATTENDANCE ACCOUNTING

FFG: STUDENT WELFARE - CHILD ABUSE AND NEGLECT

FFH: STUDENT WELFARE - FREEDOM FROM DISCRIMINATION,
HARASSMENT, AND RETALIATION

FMF: STUDENT ACTIVITIES - CONTESTS AND COMPETITION

FNG: STUDENT RIGHTS AND RESPONSIBILITIES - STUDENT AND
PARENT COMPLAINTS/GRIEVANCES

GF: PUBLIC COMPLAINTS

6. Reports - Discussion and necessary action to include, but not limited to:
 - A. CFO's Report - Moises Santiago
 - 1) Review and approve the district's investment policy CDA (Local) 69
 - 2) Financials 76
 - 3) 4th Quarter Investment Report 96
 - 4) Check Register - August 2020
 - B. Superintendent's Report - Dwain York
 - C. Board President's Report - Joe Malone
 - 1) Agenda calendar 124
 - 2) Election Information 126
 - 3) Board Request - Rob Campbell: The Big Serve 127
 - 4) Board Request - Lori Olson: Research HEPA Filtration System for HVAC 128
 - 5) TASB Delegate and Alternate, TASB Delegate Assembly 129
7. Closed Session
 - A. Deliberation Regarding Security Devices or Security Audits. *Texas Gov't Code §551.076 and §551.089*
 - B. Personnel matters. *Texas Gov't Code § 551.074.*
 - 1) New hires/terminations/employee discipline
 - C. Deliberation regarding real property. *Texas Gov't Code § 551.072.*
 - D. Consultation with Attorney. *Texas Gov't Code § 551.071*
8. Action on items discussed in executive session
9. Prepare for next meeting - Discussion to include, but not limited to:
Set date, time, and place of next meeting, Upcoming agenda items
10. Adjourn

Wimberley ISD
2018 Bond Program Status Report and Recap
September 21, 2020

Danforth Jr. High Renovation and Addition

Contractor	Balfour Beatty
Contract Type	CMaR
Start Date:	March 25, 2019
Completion Date:	July 2020
Project Status:	100% Complete
Base Contract:	\$8,087,073
Amendments:	(1) \$186,389 (Sr. High Parking Lot Repave) (2) \$101,976 (Gym Roof Replacement) (3) \$ 80,010 (Insulation and Framing for Envelope)
Current Contract Total:	\$8,455,448

Notes: The contractor has applied for final payment and release of retainage.

Scudder Repurpose

Contractor	Balfour Beatty
Contract Type	CMaR
Start Date:	June 2020
Completion Date:	August 2020
Project Status:	100% Complete
Base Contract:	\$606,272 (issued as an amendment to the Balfour Beatty Danforth contract)

The Scudder Repurpose project is complete. The portable classroom has been moved to the High School. Toilet fixtures need to be changed out to normal sized ADA compliant fixtures.

Ag Barn

Contractor	Workman Commercial
Contract Type	CSP

Start Date:	May 24, 2019
Completion Date:	October, 2019
Project Status:	Construction Complete
Contract Amount:	\$997,000

New Primary School

Contractor	Bartlett Cocke
Contract Type	CSP
Start Date:	June 6, 2019
Completion Date:	July 31, 2020
Project Status:	99% complete
Base Contract:	\$22,238,439
Amendments	(1) \$118,243 (PEC Revisions and offsite utilities)
	(2) \$146,061
Current Contract Total	\$22,502,743

Notes: Millwork is 90% complete. Remaining materials scheduled for delivery and installation this week.

Changes to the PA/Intercom system to take place this week. This system will be set up on its own network.

Blue Hole Primary School was the recipient of the prestigious “2020 Texas Rain Catcher Award” from the Texas Water Development Board.

Final commissioning, air balance and punch list work is nearly complete.

Pricing for house demo and DAS System forthcoming.

Other Bond Projects

Athletics Storage Building – Civil design and TCEQ review underway. Contractor bids scheduled for Board consideration in October.

Pricing to relocate Scudder playground equipment to Blue Hole Primary is forthcoming.

WIMBERLEY INDEPENDENT SCHOOL DISTRICT
FY20 Student Enrollment
9/16/2020

Tuition based Pre-K 52

											Transfers			
											Employee	Non Employee		
EE/PPCD	4	Half Funding								2		5		
PK (drop in)	PK-4	39		PK-3	23						62	2	17	
Kindergarten	12	21	19	22	14	25	19	20		152	3	32		
First Grade	18	22	20	7	19	23	17	18		144	5	26		
Second Grade	1	19	21	19	20	19	24	16	18	11	168	4	21	
Third Grade	21	21	21	23	22	19	20	19		166	8	42		
Fourth Grade	21	7	21	21	21	25	21	20	23	201	1	14		
Fifth Grade	24	24	21	24	23	23	23	15		177	4	16		
Sixth Grade										215	1	32		
Seventh Grade										201	1	26		
Eighth Grade										206	3	27		
Ninth Grade										211	4	34		
Tenth Grade										212	2	27		
Eleventh Grade										221	6	34		
Twelfth Grade										171	3	27		
Enrollment Total	2564										FUNDED TOTAL:	2512	47	375

422

BLUE HOLE CAMPUS	
EC/Kindergarten - 2nd Grade	<u>531</u>
JACOB'S WELL CAMPUS	
3rd - 5th Grade	<u>544</u>
DANFORTH CAMPUS	
6TH - 8TH Grade	<u>622</u>
HIGH SCHOOL	
9TH - 12TH Grade	<u>815</u>
<i>In District Enrollment</i>	2090

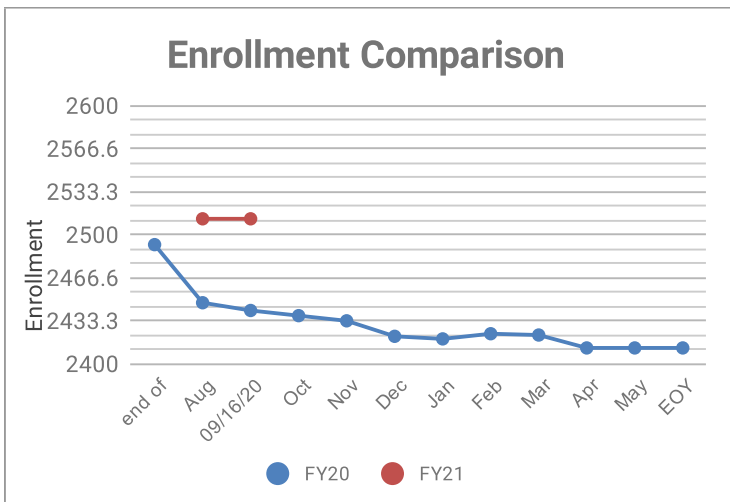
District Transfer Students Appx. Savings to District	
\$1,768,349	
Austin	2
Blanco	25
Comal	72
Dripping Spr	27
Hays	89
Lake Travis	2
Leander	1
Lockhart	4
New Braunfels	1
Northside	1
San Marcos	198

WIMBERLEY INDEPENDENT SCHOOL DISTRICT FY21 Student Enrollment

By Campus	05/22/20	Aug	09/16/20	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	EOY
Blue Hole	378	384	384									
Jacob's Well	729	720	720									
Danforth	593	593	593									
WHS	792	802	802									

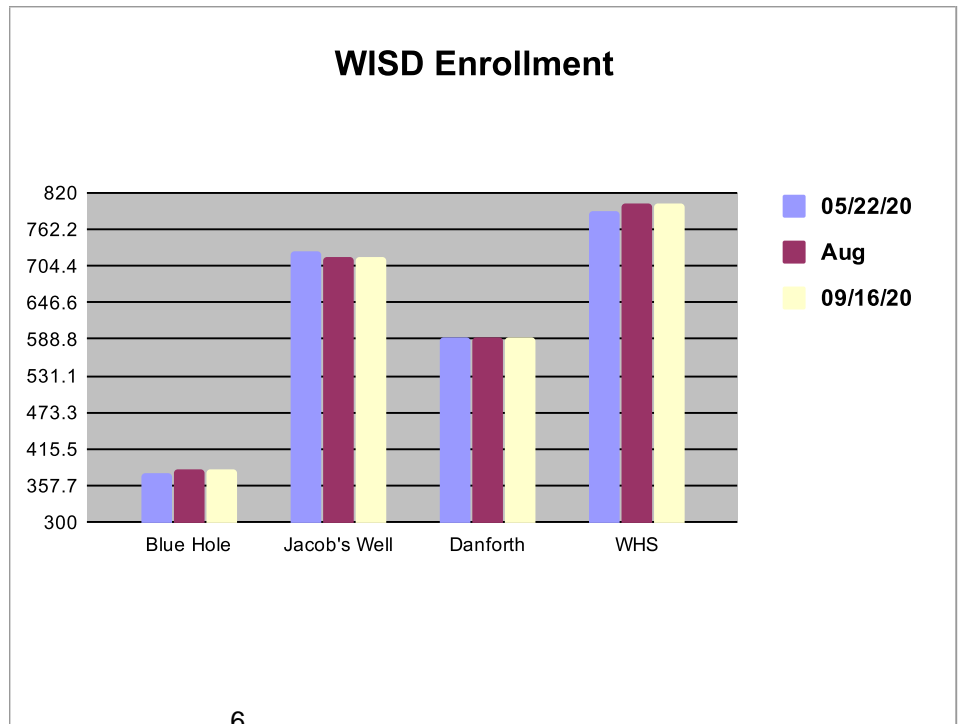
All	end of	Aug	09/16/20	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	EOY
FY20	2492	2447	2441	2437	2433	2421	2419	2423	2422	2412	2412	2412
FY21		2512	2512								0	0

Transfer	end of	Aug	09/16/20	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	EOY
FY20	361	357	354	359	357	350	348	364	362	361	361	361
FY21		422	422									



All students		FY21	Transfer students	
#	% Increase		#	% Increase
20	1%	Aug	61	17%
20	1%	Sept	61	17%
	0%	Oct		0%
	0%	Nov		0%
	0%	Dec		0%
	0%	Jan		0%
	0%	Feb		0%
	0%	Mar		0%
	0%	Apr		0%
	0%	May		0%
	0%	EOY		0%

Sept 2020	All Students	Transfers Students	% Transfers
District	2512	422	17%
WHS	815	137	17%
Danforth	622	90	14%
JWE	544	85	16%
Blue Hole	531	110	21%



Minutes of Regular Meeting

The Board of Trustees

Wimberley Independent School District

A Regular Meeting of the Board of Trustees of Wimberley Independent School District was held Monday, **August 17, 2020**, beginning at **5:30 PM** in the WISD Administration Building ****VIRTUAL MEETING****.

The regular meeting of the Board of Trustees of the Wimberley Independent School District was called to order by Joe Malone at 5:41 p.m. A quorum was established with the following members present: Joe Malone, Traci Maxwell, Rob Campbell, and Ken Strange. Lori Olson and Will Conley were available virtually.

Administrators Present: Dwain York, Dee Howard, Moises Santiago. Virtually: Jason Valentine, Greg Howard, Dara Richardson, Stephanie Norris

Directors Present: Darelle Jordan Virtually: Roz Simmons

The audio recording of the Pledge of Allegiance to the U.S. flag was led by a WHS student. Joe Malone held a moment of silence and the audio recording of the District's Vision, Mission and Goals was led by a WHS student.

1. Public Hearing to discuss 2020-21 proposed property tax rate – The public hearing was presented by Moises Santiago. Mr. Santiago presented the 2020-21 proposed property tax rate with the M&O \$0.9568 and I&S \$0.2727 with a total tax rate of \$1.2295.
2. Special Recognition – No recognition this month.
3. Public Forum - No individual requested to address the Board during the Public Forum.
4. Discussion regarding 2020-21 Budget workshop - Moises Santiago and Dwain York reviewed the scenarios for the Board. Discussion was held concerning the preliminary enrollment, budget summaries, requested scenarios and fund balance. Rob Campbell commended Moises Santiago for providing the budget in a timely manner.
5. Adoption of 2020-21 Operating Budget - Motion was made by Ken Strange to adopt scenario 4 as the 2020-21 budget. The motion was seconded by Rob Campbell. Lori Olson questioned the deficit of scenarios 4 and 8 if every position was filled. The motion was approved 6-0.
6. Adoption of 2021 Wimberley ISD Tax Rate and Resolution – Motion was made by Will Conley to adopt the 2021 WISD tax rate and resolution. The motion was seconded by Traci Maxwell and approved 6-0.
7. Approve the 2020-21 Payroll Plan and Stipends - Moises Santiago reviewed the plan for the Board and stated no changes were made to the stipends. Motion was made by Ken Strange to approve the 2020-21 payroll plan and stipends. The motion was

seconded by Rob Campbell. Lori Olson questioned the stipend schedule and Mr. Santiago stated he will send the schedule to the Board. The motion was approved 6-0.

8. Status report concerning the collection of delinquent property taxes by Perdue, Brandon, Fielder, Collins & Mott, LLP - Sergio Garcia with Perdue, Brandon, Fielder, Collins & Mott, LLP reviewed the status report for the Board.
9. Take action to adopt written findings as to the extension of delinquent tax collections contract and approve the extension of a contingent fee contract with Perdue Brandon Fielder Collins and Mott, LLP pursuant to Section 6.30 of the Tax Code, said contract being for the collection of delinquent government receivables owed to Wimberley Independent School District and notice of said contract is posted with the agenda in accordance with Section 2254 of the Government Code. - Motion was made by Lori Olson to adopt written findings as to the extension of delinquent tax collections contract and approve the extension of a contingent fee contract with Perdue Brandon Fielder Collins and Mott, LLP pursuant to Section 6.30 of the Tax Code, said contract being for the collection of delinquent government receivables owed to Wimberley Independent School District and notice of said contract is posted with the agenda in accordance with Section 2254 of the Government Code. The motion was seconded by Ken Strange and approved 5-0-1. Will Conley abstained. Sergio Garcia with Perdue, Brandon, Fielder, Collins & Mott, LLP reviewed the agenda item for the Board.
10. Bond update - Bob Farmer reviewed the bond update for the Board.
 - Danforth Jr. High Renovation and Addition – Building is complete, occupied, coaches are moving in, classroom furniture is in place, teachers are onsite and punch list work is nearly complete. Classroom set up is underway.
 - Scudder Repurpose - The Scudder Repurpose project is substantially complete. Punch list work is underway. Pending the relocation of a portable to WHS.
 - Ag Barn - Construction Complete
 - New Primary School – Mr. Farmer stated he struggled to come to terms with Aqua but that is now complete. The Fire Marshall has signed off. Millwork is incomplete. Bartlett Cocke will be engaging another millwork fabricator to complete the remaining work. Furniture delivery continues. Final desk shipment and installation due this week. Landscape is ongoing. Playground is close to completion. A full Certificate of Occupancy has been issued. Final inspections are complete. Classroom set up underway.
 - Other Bond Projects - Athletics Storage Building – Design work underway. Stadium walkway improvements are nearly complete.
 - A. Approval of RFP #2020-07 Security Equipment (Bond Project) –This item is included in the bond allocated funds for Scudder repurpose.
 - B. Consider and approval of amendment to Bartlett Cocke contract for Blue Hole Primary project – Bob Farmer reviewed the agenda item for the Board. Provided initial report to the Fire Marshall, communications in the building for first responders. The Fire Marshal requested Mr. Farmer to test the building for police as well as the fire department. If additional antennas are needed it will be

a significant cost of around \$150,000 which is not included in this item. Motion was made by Ken Strange to approve the \$146,061.61 change order. The motion was seconded by Traci Maxwell and approved 6-0. Joe Malone thanked Bob Farmer and his AGCM team. He stated it was a breath of fresh air working with Bob and appreciated his hard work in coming under budget and on time. Mr. York and Ms. Olson also thanked Mr. Farmer for his professionalism.

11. Consent Agenda – Motion was made by Ken Strange to approve the consent agenda minus items I and M. The motion was seconded by Rob Campbell and approved 6-0.

Discussion was held concerning item I (2020-2021 Chapter 49 Agreement for the Purchase of Attendance Credits). Moises Santiago reviewed this item for the Board. Motion was made by Traci Maxwell to approve the 2020-2021 Chapter 49 Agreement for the purchase of attendance credits. The motion was seconded by Ken Strange and approved 6-0.

Motion was made by Rob Campbell to suspend the discussion for next month as these policy updates were given in a very rapid fashion and he has some additional research questions to ask on the various policies and stated it's a lot there that effects this local district and just asking for a little more time to do some research. The motion was seconded by Will Conley. Dee Howard reviewed the policy updates for the Board. Lori Olson stated the Legal portions of the policies are not an option. Dee Howard stated the Local policies are recommended by TASB. The motion was approved 5-1. Lori Olson voting against the motion.

- A. Acceptance of Agenda
- B. Budget Amendment, final 2019-20
- C. Preliminary Student Enrollment, August 14, 2020
- D. Minutes of the Regular Meeting, July 20, 2020
- E. Minutes of Called Meeting, July 16, 2020
- F. Minutes of Called Meeting, July 29, 2020
- G. Teacher Appraisal Calendar and Appraisers
- H. Approve Bond expenditures (see attached)
- I. 2020-2021 Chapter 49 Agreement for the Purchase of Attendance Credits
- J. Addition of AVANT test for Spanish I and II CBE
- K. Grade 4 and 7 Notification Waiver for Parent notice requirements for students at risk of failure
- L. Jacob's Well, Danforth JH and WHS Campus Improvement Plans FY21
- M. Policy Update 115, Including Local policies:
 - 1) BF: Board Policies
 - DIA: Employee Welfare - Freedom From Discrimination, Harassment, And Retaliation

DMD: Professional Development - Professional Meetings And Visitations
EI: Academic Achievement
FB: Equal Educational Opportunity
FD: Admissions
FEB: Attendance - Attendance Accounting
FFG: Student Welfare - Child Abuse And Neglect
FFH: Student Welfare - Freedom From Discrimination, Harassment, And Retaliation
FME: Student Activities - Contests And Competition
FNG: Student Rights And Responsibilities - Student And Parent Complaints/Grievances
GF: Public Complaints

- N. Approve Adjunct faculty members - Jason Mangold, Kate Blankenship
- O. Approval of annual Resolution regarding Extracurricular status of 4-H organization
- P. Approve 10 extracurricular days for 4-H students
- Q. Call the November 3, 2020 Wimberley I.S.D. Board of Trustees Election for Places 6 and 7
- R. Changing date of January, February, March, 2021 Regular Board of Trustees Meeting

12. RESOLUTION for Employee Unpaid Furlough – Mr. York reviewed the item for the Board. Motion was made by Will Conley to approve the resolution as presented. The motion was seconded by Ken Strange. Discussion was held. The motion was approved 6-0.

The Board took a break at 7:43 p.m. and reconvened at 8:02 p.m.

13. Reports

A. CFO's Report

- 1) Financials - Moises Santiago reviewed the financial for the Board.
- 2) Check Register - July 2020
- 3) Possible approval of amendment to the Lawn Maintenance Contract – Moises Santiago reviewed the amendment for the Board. Motion was made by Traci Maxwell to approve the amendment to the Lawn Maintenance Contract. The motion was seconded by Ken Strange and approved 6-0.

B. Superintendent's Report - Mr. York updated the Board on safety procedures for campus staff and students. He reviewed the supplies received for at-school and at-home learning and stated the food distribution will continue for students planning at-home learning. Discussion was held concerning the face coverings for students and staff, TEA's guidance for school opening along with the August 4 press release from the Governor on personal protective equipment (PPE) provided for the District and plans in place for closure. Mr. York will review with the staff the guidelines that were approved. Will Conley stated anything

we can do to give us the best opportunity for success noting face coverings has done the best so far and requested that Mr. York promote that.

- 1) Proposed new position - Wellness Aide - Dwain York reviewed the request for the Board. Motion was made by Lori Olson to approve the new position. The motion was seconded by Traci Maxwell. Mr. York reviewed the position and duties of the wellness aide. The motion was approved 6-0.

C. Board President's Report

- 1) Agenda calendar
- 2) Election Information – Dottie Busby reported that Ken Strange is unopposed in Place 7 for the November 3, 2020 school board election and in Place 6 applications were received from Gretchen Holtsinger and Lexi Jones.

14. Closed Session - The Board adjourned into closed session at 8:43 p.m. pursuant to Texas Government Code Section: 551.071 *et seq.*

A. Deliberation Regarding Security Devices or Security Audits. *Texas Gov't Code §551.076 and §551.089*

B. Personnel matters. *Texas Gov't Code § 551.074.*

- 1) New hires/terminations/employee discipline
- 2) Superintendent's Contract renewal and Compensation

C. Deliberation regarding real property. *Texas Gov't Code § 551.072.*

- 1) Earnest money contract for purchase of real estate

D. Consultation with Attorney. *Texas Gov't Code § 551.071*

The Board reconvened at 9:41 p.m.

Lori Olson left the meeting at 9:41 p.m.

15. Action on items discussed in executive session – Motion was made by Traci Maxwell to offer contract for hire to Traci Resendis, Mercedes Kroening and Jessica Williams. The motion was seconded by Ken Strange and approved 5-0.

Motion was made by Traci Maxwell to accept the resignation of Kelsey Griffis. The motion was seconded by Rob Campbell and approved 5-0.

A. Superintendent's Contract renewal and Compensation – Motion was made by Rob Campbell to approve the Superintendent's contract addendum through June 30, 2022 with a 3% increase in pay with health insurance at a monthly rate of \$852.00 to be paid as salary. The motion was seconded by Will Conley. Mr. Conley thanked Mr. York for what he does for the district. Joe Malone stated he appreciates it. The motion was approved 5-0.

B. Action on earnest money contract for purchase of real estate – Motion was made by Ken Strange to approve the unimproved property contract between Robert Johnson and Wimberley I.S.D. for the 3.461-acre tract at the corner of 2325 and Carney Lane. The motion was seconded by Rob Campbell and approved 4-0-1.

Traci Maxwell abstained. Traci Maxwell recused herself from discussion on this item during executive session.

16. Prepare for next meeting – The next regular meeting is scheduled for September 21, 2020.
17. Adjourn - There being no further business to discuss, motion was made by Ken Strange to adjourn the meeting at 9:44 p.m. and was approved without objection.

 Rob Campbell, Secretary

 Joe Malone, President

Bond Invoices			
<u>AG/CM Inc.</u>			
Project 17-048P	WISD Bond Planning	Invoice 7808	\$ 47,263.00
<u>Kleinfelder</u>			
Proj. 20200950.001A	Blue Hole Primary	Invoice 001288887	\$ 2,832.50
<u>O'Connell Robertson</u>			
Project 01820.01	Blue Hole Primary	Invoice 22	\$ 23,801.51
Project 01820.02	Scudder ES Improvements	Invoice 3	\$ 7,027.93
Project 01820.04	Danforth JH Improv	Invoice 23	\$ 5,660.95
Project 01820.06	Athletic Storage Bldg	Invoice 2	\$ 1,223.75
<u>ABC Longhorn Moving</u>			
	Scudder move	Invoice 23849	\$ 15,057.00
<u>Austin Structured Cabling</u>			
	Blue Hole Primary	Invoice 1881	\$ 148,636.75
	Blue Hole Primary	Invoice 1884	\$ 68,412.16
<u>Play & Park Structures</u>			
Order #0148602	Blue Hole Primary	Invoice PJI-0038815	\$ 179,942.34
<u>Worthington Contract Furniture, LP</u>			
PO #6992000006	Danforth JH	Invoice 4001	\$ 152,127.93
PO #6992000006	Danforth JH	Invoice 4002	\$ 721,917.12
PAY APPS			
<u>Balfour Beatty Construction</u>			
Project 16226000	Danforth JH Improv	PAY APP 16	\$ 581,503.00
<u>Bartlett Cocke, L.P.</u>			
Project 01-192056	Blue Hole Primary School	PAY APP 14	\$ 815,816.77
<u>Total for Approval</u>			<u>\$ 2,771,222.71</u>

Minutes of Special Meeting

The Board of Trustees

Wimberley Independent School District

A Special Meeting of the Board of Trustees of Wimberley Independent School District was held Monday, **August 10, 2020**, beginning at **12:00 PM** in the ****VIRTUAL MEETING****.

The special meeting of the Board of Trustees of the Wimberley Independent School District was called to order by Joe Malone at 12:09 p.m. A quorum was established with the following members present: Joe Malone, Traci Maxwell, Rob Campbell, Lori Olson and Ken Strange. Will Conley was available virtually.

Administrators Present: Dwain York

1. Public Forum - No individual requested to address the Board during the Public Forum.
2. Closed Session - The Board adjourned into closed session at 12:10 pursuant to Texas Government Code Section: 551.071 *et seq.*
 - A. Deliberation Regarding Security Devices or Security Audits. *Texas Gov't Code §551.076 and §551.089*
 - B. Personnel matters. *Texas Gov't Code § 551.074.*
 - 1) New hires/terminations/employee discipline
 - C. Consultation with Attorney. *Texas Gov't Code § 551.071*
 - 1) Consultation with Board counsel regarding employee
 - D. Deliberation regarding real property. *Texas Gov't Code § 551.072.*
 - 1) Discussion and possible action for purchase of property

Traci Maxwell recused herself from 12:34 - 1:02 p.m.

The Board reconvened at 1:08 p.m.

3. Action on items discussed in executive session - Motion was made by Traci Maxwell to approve the teacher contracts of LaTonya Rosborough, Emily Keese, Melanie Hill and Pablo Garcia. The motion was seconded by Ken Strange and approved 6-0. Motion was made by Traci Maxwell to accept the resignation of Zachary Lindemann and Cathy Carolan. The motion was seconded by Ken Strange and approved 6-0.
4. Adjourn - There being no further business to discuss, motion was made by Ken Strange to adjourn the meeting at 1:10 p.m. and was approved without objection.

Rob Campbell, Secretary

Joe Malone, President

**WIMBERLEY INDEPENDENT SCHOOL DISTRICT
BOARD OF EDUCATION
WIMBERLEY, TEXAS**

Subject: Bond Invoices

Date: 09/16/2020

Presented by: York/Farmer



BACKGROUND INFORMATION

Bond Invoices submitted to the Board of Trustees for Approval

AG/CM Inc.

Project 17-048P	WISD Bond Planning	Invoice 7849	\$	48,265.00
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Kleinfelder

Proj. 20200950.001A	Blue Hole Primary	Invoice 001291764	\$	860.50
Proj. 20200950.001A	Blue Hole Primary	Invoice 001294990	\$	713.75

O'Connell Robertson

Project 01820.01	Blue Hole Primary	Invoice 23	\$	12,990.76
Project 01820.02	Scudder ES Improvements	Invoice 4	\$	2,480.38
Project 01820.04	Danforth JH Improv	Invoice 24	\$	6,335.95

Air Technologies Inc.

Job 6835	Blue Hole Primary	Invoice 7394	\$	26,800.00
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Austin Structured Cabling

DIR-TSO-4358	Blue Hole Primary	Invoice 1888	\$	22,802.45
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PAY APPS submitted to the Board of Trustees for Approval

Balfour Beatty Construction

Project 16226000	Danforth JH Addition	PAY APP 17	\$	89,586.00
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Bartlett Cocke, L.P.

Project 01-192056	Blue Hole Primary School	PAY APP 15	\$	277,746.86
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<u>Total for Approval</u>			\$	<u>488,581.65</u>
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ADMINISTRATIVE RECOMMENDATION

Approved by Mr. Farmer. Requesting Board Approval

BOARD ACTION REQUIRED

**NOTICE OF GENERAL ELECTION
(AVISO DE ELECCION GENERAL)**

To the Registered Voters of the Wimberley Independent School District, Hays County, Texas:
(A los votantes registrados del Distrito Escolar Independiente de Wimberley, Condado de Hays, Texas:)

Notice is hereby given that the polling places listed below will be open from 7:00 a.m. to 7:00 p.m. on November 3, 2020, for voting in a general election to elect Trustees of the Wimberley Independent School District, Places 6 and 7.

(Notifíquese, por las presente, que las casillas electorales sitados abajo se abriran desde las 7:00 a.m. hasta las 7:00 p.m. el 3 de Noviembre de 2020 para votar en la Elección General para elegir La Junta Directiva del Distrito Escolar Independiente de Wimberley, para Lugares 6 y 7.)

On Election Day, voters must vote in their precinct where registered to vote.
(En el día de las elecciones, los electores deben votar en su distrito electoral registrado para votar.)

Location of Polling Place:
(Dirección de las Casillas Electorales:)

See attached list provided by Hays County Election Administrator

Absentee Voting by personal appearance will be conducted each weekday at:
(La votación en ausencia en persona se llevará a cabo de lunes a viernes en:)

See attached list provided by Hays County Election Administrator

Applications for ballot by mail shall be mailed to:
(Las solicitudes para boletas que se votaran en ausencia por correo deberan enviarse a:)

Jennifer Anderson, Early Voting Clerk
(Secretario De Votacion Adelantada, Jennifer Anderson)
712 S. Stagecoach Trail, Suite 1012
San Marcos TX 78666-5999

Applications for ballots by mail must be received no later than the close of business on October 23, 2020.
(Las solicitudes para boletas que se votarán en ausencia por correo deberán recibirse para el fin de las horas de negocio el Octubre 23, 2020.)

Issued this the 21st day of September, 2020.
(Emitada este día 21st de Septiembre, 2020.)

Signature of Board President
(Firma del Presidente de la Junta)

Buda

✓	✓	Buda City Hall	405 East Loop Street, Building 100
	✓	Buda Elementary Upper Campus	300 San Marcos Street
	✓	Hays Hills Baptist Church	1401 North FM 1626
	✓	McCormick Middle School	5700 Dacy Lane
	✓	Southern Hills Church of Christ	3740 FM 967

Kyle and Umland

	✓	Chapa Middle School	3311 Dacy Lane
✓	✓	HCISD Admin — Arnold Transportation Building (formerly the bus barn)	21003 Interstate 35 Frontage Road
	✓	Hays County Precinct 2 Office	5458 FM 2770
✓	✓	Kyle City Hall	100 West Center Street
✓	✓	Live Oak Academy High School	4820 Jack C. Hays Trail
	✓	Tobias Elementary School	1005 FM 150
	✓	Umland Elementary School	2331 High Road (Umland)
	✓	Wallace Middle School	1500 West Center Street

Dripping Springs and Austin

	✓	Belterra Centre	151 [688] Trinity Hills Drive (Austin)
✓	✓	Dripping Springs Ranch Park	1042 Event Center Drive (Dripping Springs)
✓	✓	Hays County Precinct 4 Office	195 Roger Hanks Parkway (Dripping Springs)
	✓	North Hays County Fire/Rescue Station #2 — Driftwood Battalion	15850 FM 1826 (Austin)

Wimberley

	✓	Cypress Creek Church	211 Stillwater
✓	✓	Scudder Primary School	400 Green Acres Drive
	✓	VFW Post #6441	401 Jacobs Well Road
✓	✓	Wimberley Community Center	14068 Ranch Road 12

		<u>Buda</u>	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Buda City Hall	405 East Loop Street, Building 100
	<input checked="" type="checkbox"/>	Buda Elementary Upper Campus	300 San Marcos Street
	<input checked="" type="checkbox"/>	Hays Hills Baptist Church	1401 North FM 1626
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<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Wimberley Community Center	14068 Ranch Road 12

Proclamation 2021
WISD Instructional Materials Committee

English and Spanish Prekindergarten Systems

Blue Hole Primary

1. Meagan Buck
2. Sochilt Gauna
3. Lori Scrogin
4. Jessica Buck
5. Christi Moeller

December 2020						
S	M	T	W	T	F	S
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14 Proposed date for December BOT meeting

21-31 Holiday

**WIMBERLEY INDEPENDENT SCHOOL DISTRICT
BOARD OF EDUCATION
WIMBERLEY, TEXAS**

Subject: Policy Update 115

Date: 8/12/2020

Presented by: Dee Howard

Consent

BACKGROUND INFORMATION

Policy Update 115 is recommended by TASB Policy Services. The WISD School Administrators have reviewed and accepted the TASB recommendations without additional changes.

ADMINISTRATIVE RECOMMENDATION

Approve as presented

BOARD ACTION REQUIRED

Vantage Points

A Board Member's Guide to Update 115

Please note: *Vantage Points* is an executive summary, prepared specifically for board members, of the local policies included in the update. The topic-by-topic outline and brief descriptions focus on key issues to help local officials understand changes found in the policies.

The description of local policy changes in *Vantage Points* is highly summarized. Please pay careful attention to the more detailed, district-specific Explanatory Notes and the policies in your localized update packet.

For questions, contact Policy Service at policy.service@tasb.org, call us at 800-580-7529, or visit our website at policy.tasb.org.

This information is provided for educational purposes only to facilitate a general understanding of the law or other regulatory matter. This information is neither an exhaustive treatment on the subject nor is this intended to substitute for the advice of an attorney or other professional adviser. Consult with your attorney or professional adviser to apply these principles to specific fact situations.

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Update 115 focuses on updating and reorganizing several policies in the FFE series of the policy manual addressing student welfare. FFEA continues to focus on counseling, and a new code, FFEB, focuses on mental health provisions.

Several policies have been revised to incorporate the new Title IX regulations, effective August 14, 2020, which define sexual harassment under Title IX and establish detailed procedures for how districts must respond to notice or allegations of sexual harassment.

In addition to these changes, Update 115 includes several other policies affected by legislation from the 86th Legislative Session that were not included in Update 114 and incorporates numerous changes from revised Administrative Code rules.

We strongly encourage you to review the Explanatory Notes contained in your district's update packet for information specific to your local policies and background on changes to the legal policies. Please remember that (LEGAL) policies provide the legal framework for key areas of district operations; they are not adopted by the board.

Section B—Local Governance

Board Policy

A revision to **BF(LOCAL)** addressing board policy adoption clarifies that a district's legally referenced policies are not adopted by the board. The (LEGAL) policies provide information on current law and context for the district's (LOCAL) policies.

Section D—Personnel

Compensation and Benefits

For districts that provide paid vacation and holiday benefits, recommended revisions to **DED(LOCAL)** address the board's authorization of these programs, including which employees are eligible for the benefits. Administrative procedures are recommended to address the details of these programs to promote consistent, effective implementation and prevent conflict between policy and administrative procedures.

Discrimination, Harassment, and Retaliation

Revisions to **DIA(LOCAL)** incorporate the recent United States Supreme Court decision *Bostock v. Clayton County, Georgia*, which held that an adverse employment action against an employee on the basis of homosexuality or transgender status violates Title VII's prohibition on sex discrimination in employment. As a result, the policy clarifies that discrimination on the basis of sex includes discrimination on the basis of biological sex, gender identity, sexual orientation, gender stereotypes, or any other prohibited basis related to sex.

Other revisions address the new Title IX regulations and:

- Include sexual harassment as defined by Title IX in the definition of prohibited conduct and clarify employee reporting requirements;

- Indicate that the district will follow the district’s existing investigation process to address allegations of prohibited conduct that would not meet the Title IX definition of sexual harassment;
- Add specific provisions outlining the legally required district response when the district receives notice or an allegation of conduct that could meet the definition of sexual harassment under Title IX;
- Add a requirement for the superintendent to develop a Title IX formal complaint process that will apply following a formal complaint and that must comply with the elements in the new regulations; and
- Designate the preponderance of the evidence standard to determine responsibility in formal complaints of sexual harassment under Title IX. **If the board wishes to instead use the clear and convincing evidence standard, which is a higher standard of evidence, please contact the district’s policy consultant.** The district must use the same standard of evidence for investigation of all formal Title IX sexual harassment complaints, including complaints by employees.

**Section E—
Instruction**

**Academic
Achievement**

Revised Administrative Code rules prompted revisions to **EI(LOCAL)** on academic achievement. Provisions on partial credit reflect new terminology from the rules regarding awarding of credit proportionately when a student receives a passing grade in “half” of a course, rather than per “semester.”

To provide flexibility, Policy Service recommends deletion of the statement in most districts’ policies that a student shall be required to retake only the portion of the course with a failing grade. There are various methods for a student to earn credit for the failed part of a course, and board policy is not required to specify which particular method may be used.

For those districts that did not have existing provisions on awarding course credit proportionately to a student who successfully completes only half a course, provisions have been recommended for the district’s consideration. **This is optional text; contact the district’s policy consultant if the district does not wish to include it.**

Some districts’ local policies included provisions on late enrollment or withdrawal of mobile students. To avoid conflict with new Administrative Code rules addressing transition assistance for highly mobile students who are homeless or in substitute care, which are addressed in **FD(LOCAL)**, below, Policy Service recommends deleting these provisions from **EI(LOCAL)**. Any specific practices in this area will need to align with the new rules and could be included in administrative procedures.

Section F— Students

Admissions

As mentioned above, recommended changes to **FD(LOCAL)** on admissions are based on new Administrative Code rules addressing transition assistance for highly mobile students who are homeless or in substitute care. The rules require districts to adopt local policy to assist with awarding credit to these students for a course that was earned prior to the student enrolling in or transferring to the district.

Attendance Accounting

Recommended revisions to **FEB(LOCAL)** on attendance accounting are to address amended Administrative Code rules. The rules remove the reference to taking attendance during the second or fifth instructional hour and specify that attendance shall be determined at the official attendance-taking time during the campus's instructional day. The recommended policy text assigns to the superintendent the responsibility of designating the district's official attendance-taking time. Note that there is no requirement to include the official attendance-taking time in policy; it may be designated in district procedures.

Child Abuse and Neglect

FFG(LOCAL) on child abuse and neglect has been significantly revised to comply with amended Administrative Code rules.

Recommended text is included to provide the required policy addressing sexual abuse, trafficking, and other maltreatment of children that must be included in the district improvement plan and the student handbook.

The rules also revise the elements of the required child abuse and neglect reporting policy. To ensure all the policy elements are addressed in board-adopted local policy, we have revised and moved provisions from **FFG(EXHIBIT)** into the local policy and recommend deletion of the exhibit.

Discrimination, Harassment, and Retaliation

Revisions to **FFH(LOCAL)** address the new Title IX regulations and are similar to those made at **DIA(LOCAL)**, above. The **FFH(LOCAL)** revisions:

- Include sexual harassment as defined by Title IX in the definition of prohibited conduct and clarify employee reporting requirements;
- Indicate that the district will follow the district's existing investigation process to address allegations of prohibited conduct that would not meet the Title IX definition of sexual harassment;
- Add specific provisions outlining the legally required district response when the district receives notice or an allegation of conduct that could meet the definition of sexual harassment under Title IX;
- Add a requirement for the superintendent to develop a Title IX formal complaint process that will apply following a formal complaint and that must comply with the elements in the new regulations; and

- Designate the preponderance of the evidence standard to determine responsibility in formal complaints of sexual harassment under Title IX. **If the board wishes to instead use the clear and convincing evidence standard, which is a higher standard of evidence, please contact the district’s policy consultant.** The district must use the same standard of evidence for investigation of all formal Title IX sexual harassment complaints, including complaints by employees.

Provisions in **FB(LOCAL)** on the district’s Title IX coordinator for students have been updated to include required language from the new Title IX regulations. Corresponding wording changes were also made to the ADA/Section 504 coordinator text.

Student and Parent Complaints

FNG(LOCAL) on grievances by students and parents includes a recommended revision to specify that a person filing a complaint regarding refusal of entry to or ejection from property based on Education Code 37.105 shall be permitted to address the board within 90 “calendar” days unless the complaint is resolved at the administrative level. This is an exception to how other timelines are calculated in the policy, which are based on “business” days in accordance with how days are defined. In addition, we have reordered the list of protected characteristics at Other Complaint Processes, item 1, to align with revisions at FFH(LOCAL) above.

Section G—Community and Governmental Relations

Public Complaints

As with FNG(LOCAL), above, **GF(LOCAL)** on complaints by members of the public includes a recommended revision to specify that a person filing a complaint regarding refusal of entry to or ejection from property based on Education Code 37.105 shall be permitted to address the board within 90 “calendar” days unless the complaint is resolved at the administrative level. This is an exception to how other timelines are calculated in the policy, which are based on “business” days in accordance with how days are defined.

Miscellaneous Deletions

Several local policies focusing on administrative details are recommended for deletion for those districts that had them. Board-adopted policy is not required on these topics.

- BDF(LOCAL)—citizen advisory committees
- DMD(LOCAL)—professional meetings
- FMF(LOCAL)—student contests and competitions

A message from TASB Governmental Relations

TASB Advocates for Public Schools

It's a given that state and federal legislation influences school district policy and practice. But did you know that school board members can influence legislation?

- As a private citizen who serves the public, [your voice has weight with legislators](#).¹
- By [engaging with TASB](#)² you can influence the TASB Advocacy Agenda by participating in our grassroots meetings, attending Delegate Assembly, serving on the TASB Legislative Advisory Council, and more.

If you have questions about TASB's advocacy efforts and programs, contact [TASB Governmental Relations](#)³ at 800-580-4885 or Dax.Gonzalez@tasb.org.

¹ Working with Legislators: <https://www.tasb.org/trustees/champion-your-district/working-with-legislators.aspx>

² Engage with TASB: <https://www.tasb.org/trustees/champion-your-district/engage-with-tasb.aspx>

³ TASB Governmental Relations: <https://gr.tasb.org>

~~**Note:** This policy addresses harassment of district employees. For legally referenced material relating to discrimination and retaliation, see DAA(LEGAL). For harassment of students, see FFH. For reporting requirements related to child abuse and neglect, see FFG.~~

Note: [This policy addresses the prohibition against harassment of employees. For legally referenced material relating to employee discrimination and retaliation, see DAA\(LEGAL\).](#)

[For provisions related to harassment of students, including the district's response to sexual harassment as defined by Title IX, see FFH.](#)

Criminal Offense— Official Oppression

A public servant acting under color of the public servant's office or employment commits an offense if the public servant intentionally subjects another to sexual harassment.

A public servant acts under color of the public servant's office or employment if the person acts or purports to act in an official capacity or takes advantage of such actual or purported capacity.

"Sexual harassment" means unwelcome sexual advances, requests for sexual favors, or other verbal or physical conduct of a sexual nature, submission to which is made a term or condition of a person's exercise or enjoyment of any right, privilege, power, or immunity, either explicitly or implicitly.

Penal Code 39.03(a)(3), (b), (c)

Harassment of Employees Prohibited

Harassment on the basis of a protected characteristic is a violation of the federal anti-discrimination laws. A district has an affirmative duty, under Title VII, to maintain a working environment free of harassment on the basis of sex, race, color, religion, and national origin. *42 U.S.C. 2000e, et seq.; 29 C.F.R. 1606.8(a), 1604.11*

Harassment violates Title VII if it is sufficiently severe and pervasive to alter the conditions of employment. *Pennsylvania State Police v. Suders, 542 U.S. 129 (2004)*

Title VII does not prohibit all verbal and physical harassment in the workplace. For example, harassment between men and women is not automatically unlawful sexual harassment merely because the words used have sexual content or connotations. *Oncale v. Sun-downer Offshore Services, Inc., 523 U.S. 75 (1998)*

[Firing an employee on the basis of homosexuality or transgender status violates Title VII's prohibition against sex discrimination in employment. *Bostock v. Clayton County, Georgia*, 17-1618, 2020 WL 3146686, \(U.S. June 15, 2020\)](#)

Hostile Environment Verbal or physical conduct based on a person's sex, race, color, religion, or national origin constitutes unlawful harassment when the conduct:

1. Has the purpose or effect of creating an intimidating, hostile, or offensive working environment;
2. Has the purpose or effect of unreasonably interfering with an individual's work performance; or
3. Otherwise adversely affects an individual's employment opportunities.

Pennsylvania State Police v. Suders, 542 U.S. 129 (2004); *Nat'l Railroad Passenger Corp. v. Morgan*, 536 U.S. 101 (2002); *Meritor Savings Bank v. Vinson*, 477 U.S. 57 (1986); 29 C.F.R. 1604.11, 1606.8

Quid Pro Quo Conduct of a sexual nature also constitutes harassment when:

1. Submission to such conduct is made either explicitly or implicitly a term or condition of an individual's employment; or
2. Submission to or rejection of such conduct by an individual is used as the basis for employment decisions affecting the individual.

29 C.F.R. 1604.11(a)

Same-Sex Sexual Harassment Same-sex sexual harassment constitutes sexual harassment. *Oncale v. Sundowner Offshore Services, Inc.*, 523 U.S. 75 (1998)

Harassment Policy A district should take all steps necessary to prevent sexual harassment from occurring, such as affirmatively raising the subject, expressing strong disapproval, developing appropriate penalties, informing employees of their right to raise and how to raise the issue of harassment under Title VII, and developing methods to sensitize all concerned. 29 C.F.R. 1604.11(f)

Corrective Action A district is responsible for acts of unlawful harassment by fellow employees and by nonemployees if the district, its agents, or its supervisory employees knew or should have known of the conduct, unless the district takes immediate and appropriate corrective action. 29 C.F.R. 1604.11(d), (e), 1606.8(d), (e)

When no tangible employment action is taken, a district may raise the following affirmative defense:

1. That the district exercised reasonable care to prevent and promptly correct any harassing behavior; and
2. That the employee unreasonably failed to take advantage of any preventive or corrective opportunities provided by the employer or to avoid harm otherwise.

Burlington Industries, Inc. v. Ellerth, 524 U.S. 742 (1998); Faragher v. City of Boca Raton, 524 U.S. 775 (1998)

**Harassment of
Unpaid Interns**

A district commits an unlawful employment practice if sexual harassment of an unpaid intern occurs and the district or its agents or supervisors know or should have known that the conduct constituting sexual harassment was occurring, and fail to take immediate and appropriate corrective action. *Labor Code 21.1065*

Note: This policy addresses discrimination, harassment, and retaliation against District employees. For Title IX and other provisions regarding discrimination, harassment, and retaliation against students, see FFH. For reporting requirements related to child abuse and neglect, see FFG.

Definitions

Solely for purposes of this policy, the term “employee” includes former employees, applicants for employment, and unpaid interns.

Statement of Nondiscrimination

The District prohibits discrimination, including harassment, against any employee on the basis of race, color, religion, sex, national origin, age, disability, or any other basis prohibited by law. Retaliation against anyone involved in the complaint process is a violation of District policy and is prohibited.

Discrimination

Discrimination against an employee is defined as conduct directed at an employee on the basis of race, color, religion, sex, national origin, age, disability, or any other basis prohibited by law, that adversely affects the employee’s employment.

In accordance with law, discrimination on the basis of sex includes discrimination on the basis of biological sex, gender identity, sexual orientation, gender stereotypes, or any other prohibited basis related to sex.

Prohibited Conduct

In this policy, the term “prohibited conduct” includes discrimination, harassment, and retaliation as defined by this policy, even if the behavior does not rise to the level of unlawful conduct.

Prohibited conduct also includes sexual harassment as defined by Title IX. [See FFH(LEGAL)]

Prohibited Harassment

Prohibited harassment of an employee is defined as physical, verbal, or nonverbal conduct based on an employee’s race, color, religion, sex, national origin, age, disability, or any other basis prohibited by law, when the conduct is so severe, persistent, or pervasive that the conduct:

1. Has the purpose or effect of unreasonably interfering with the employee’s work performance;
2. Creates an intimidating, threatening, hostile, or offensive work environment; or
3. Otherwise adversely affects the employee’s performance, environment, or employment opportunities.

Examples

Examples of prohibited harassment may include offensive or derogatory language directed at another person’s religious beliefs or

EMPLOYEE WELFARE
FREEDOM FROM DISCRIMINATION, HARASSMENT, AND RETALIATION

DIA
(LOCAL)

practices, accent, skin color, gender identity, or need for workplace accommodation; threatening or intimidating conduct; offensive jokes, name calling, slurs, or rumors; cyberharassment; physical aggression or assault; display of graffiti or printed material promoting racial, ethnic, or other negative stereotypes; or other kinds of aggressive conduct such as theft or damage to property.

Sex-Based Harassment

As required by law, the District shall follow the procedures below at Response to Sexual Harassment—Title IX upon a report of sex-based harassment, including sexual harassment, when such allegations, if proved, would meet the definition of sexual harassment under Title IX. [See FFH(LEGAL)]

Sexual Harassment

Sexual harassment is a form of sex discrimination defined as unwelcome sexual advances; requests for sexual favors; sexually motivated physical, verbal, or nonverbal conduct; or other conduct or communication of a sexual nature when:

1. Submission to the conduct is either explicitly or implicitly a condition of an employee's employment, or when submission to or rejection of the conduct is the basis for an employment action affecting the employee; or
2. The conduct is so severe, persistent, or pervasive that it has the purpose or effect of unreasonably interfering with the employee's work performance or creates an intimidating, threatening, hostile, or offensive work environment.

Examples

Examples of sexual harassment may include sexual advances; touching intimate body parts; coercing or forcing a sexual act on another; jokes or conversations of a sexual nature; and other sexually motivated conduct, contact, or communication, including electronic communication.

Reporting Procedures

Any employee who believes that he or she has experienced prohibited conduct or believes that another employee has experienced prohibited conduct should immediately report the alleged acts. The employee may report the alleged acts to his or her supervisor or campus principal.

Alternatively, the employee may report the alleged acts to one of the District officials below.

Definition of District Officials

For the purposes of this policy, District officials are the Title IX coordinator, the ADA/Section 504 coordinator, and the Superintendent.

*Title IX
Coordinator*

Reports of discrimination based on sex, including sexual harassment, may be directed to the designated Title IX coordinator. [See DIA(EXHIBIT)]

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DIA
(LOCAL)

<i>ADA / Section 504 Coordinator</i>	Reports of discrimination based on disability may be directed to the designated ADA/Section 504 coordinator. [See DIA(EXHIBIT)]
<i>Superintendent</i>	The Superintendent shall serve as coordinator for purposes of District compliance with all other nondiscrimination laws.
Alternative Reporting Procedures	<p>An employee shall not be required to report prohibited conduct to the person alleged to have committed the conduct. Reports concerning prohibited conduct, including reports against the Title IX coordinator or ADA/Section 504 coordinator, may be directed to the Superintendent.</p> <p>A report against the Superintendent may be made directly to the Board. If a report is made directly to the Board, the Board shall appoint an appropriate person to conduct an investigation.</p>
Timely Reporting	To ensure the District's prompt investigation, reports of prohibited conduct shall be made as soon as possible after the alleged act or knowledge of the alleged act.
Notice of Report	<p>Any District supervisor who receives a report of prohibited conduct shall immediately notify the appropriate District official listed above and take any other steps required by this policy.</p> <p>Any District employee who receives a report of prohibited conduct based on sex, including sexual harassment, shall immediately notify the Title IX coordinator.</p>
Investigation of Reports Other Than Title IX	<p>The following procedures apply to all allegations of prohibited conduct other than allegations of harassment prohibited by Title IX. [See FFH(LEGAL)] For allegations of sex-based harassment that, if proved, would meet the definition of sexual harassment under Title IX, see the procedures below at Response to Sexual Harassment—Title IX.</p> <p>The District may request, but shall not require, a written report. If a report is made orally, the District official shall reduce the report to written form.</p>
Initial Assessment	Upon receipt or notice of a report, the District official shall determine whether the allegations, if proved, would constitute prohibited conduct as defined by this policy. If so, the District shall immediately authorize or undertake an investigation, regardless of whether a criminal or regulatory investigation regarding the same or similar allegations is pending.
Interim Action	If appropriate, the District shall promptly take interim action calculated to prevent prohibited conduct during the course of an investigation.

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(LOCAL)

District Investigation	<p>The investigation may be conducted by the District official or a designee, such as the campus principal, or by a third party designated by the District, such as an attorney. When appropriate, the principal or supervisor shall be involved in or informed of the investigation.</p> <p>The investigation may consist of personal interviews with the person making the report, the person against whom the report is filed, and others with knowledge of the circumstances surrounding the allegations. The investigation may also include analysis of other information or documents related to the allegations.</p>
Concluding the Investigation	<p>Absent extenuating circumstances, the investigation should be completed within ten District business days from the date of the report; however, the investigator shall take additional time if necessary to complete a thorough investigation.</p> <p>The investigator shall prepare a written report of the investigation. The report shall be filed with the District official overseeing the investigation.</p>
District Action	<p>If the results of an investigation indicate that prohibited conduct occurred, the District shall promptly respond by taking appropriate disciplinary or corrective action reasonably calculated to address the conduct.</p> <p>The District may take action based on the results of an investigation, even if the conduct did not rise to the level of prohibited or unlawful conduct.</p>
Confidentiality	<p>To the greatest extent possible, the District shall respect the privacy of the complainant, persons against whom a report is filed, and witnesses. Limited disclosures may be necessary in order to conduct a thorough investigation and comply with applicable law.</p>
Appeal	<p>A complainant who is dissatisfied with the outcome of the investigation may appeal through DGBA(LOCAL), beginning at the appropriate level.</p> <p>The complainant may have a right to file a complaint with appropriate state or federal agencies.</p>
Response to Sexual Harassment—Title IX	<p>For purposes of the District’s response to reports of harassment prohibited by Title IX, definitions can be found in FFH(LEGAL).</p>
General Response	<p>When the District receives notice or an allegation of conduct that, if proved, would meet the definition of sexual harassment under Title IX, the Title IX coordinator shall promptly contact the complainant to:</p>

EMPLOYEE WELFARE
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DIA
(LOCAL)

- Discuss the availability of supportive measures and inform the complainant that they are available, with or without the filing of a formal complaint;
- Consider the complainant's wishes with respect to supportive measures; and
- Explain to the complainant the option and process for filing a formal complaint.

The District's response to sexual harassment shall treat complainants and respondents equitably by offering supportive measures to both parties, as appropriate, and by following the Title IX formal complaint process before imposing disciplinary sanctions or other actions that are not supportive measures against a respondent.

If a formal complaint is not filed, the District reserves the right to investigate and respond to prohibited conduct in accordance with Board policies and administrative procedures.

Title IX Formal
Complaint Process

To distinguish the process described below from the District's general grievance policies [see DGBA, FNG, and GF], this policy refers to the grievance process required by Title IX regulations for responding to formal complaints of sexual harassment as the District's "Title IX formal complaint process."

The Superintendent shall ensure the development of a Title IX formal complaint process that complies with legal requirements. [See FFH(LEGAL)] The formal complaint process shall be posted on the District's website. In compliance with Title IX regulations, the District's Title IX formal complaint process shall address the following basic requirements:

1. Equitable treatment of complainants and respondents;
2. An objective evaluation of all relevant evidence;
3. A requirement that the Title IX coordinator, investigator, decision-maker, or any person designated to facilitate an informal resolution process not have a conflict of interest or bias;
4. A presumption that the respondent is not responsible for the alleged sexual harassment until a determination is made at the conclusion of the Title IX formal complaint process;
5. Time frames that provide for a reasonably prompt conclusion of the Title IX formal complaint process, including time frames for appeals and any informal resolution process, and that allow for temporary delays or the limited extension of time frames with good cause and written notice as required by law;

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DIA
(LOCAL)

6. A description of the possible disciplinary sanctions and remedies that may be implemented following a determination of responsibility for the alleged sexual harassment;
7. A statement of the standard of evidence to be used to determine responsibility for all Title IX formal complaints of sexual harassment;
8. Procedures and permissible bases for the complainant and respondent to appeal a determination of responsibility or a dismissal of a Title IX formal complaint or any allegations therein;
9. A description of the supportive measures available to the complainant and respondent;
10. A prohibition on using or seeking information protected under a legally recognized privilege unless the individual holding the privilege has waived the privilege;
11. Additional formal complaint procedures in 34 C.F.R. 106.45(b), including written notice of a formal complaint, consolidation of formal complaints, recordkeeping, and investigation procedures; and
12. Other local procedures as determined by the Superintendent.

Standard of Evidence

The standard of evidence used to determine responsibility in a Title IX formal complaint of sexual harassment shall be the preponderance of the evidence.

Retaliation

The District prohibits retaliation against an employee who makes a claim alleging to have experienced discrimination or harassment, or another employee who, in good faith, makes a report of harassment or discrimination, files a complaint of harassment or discrimination, serves as a witness, or otherwise participates or refuses to participate in an investigation.

Examples

Examples of retaliation may include termination, refusal to hire, demotion, and denial of promotion. Retaliation may also include threats, intimidation, coercion, unjustified negative evaluations, unjustified negative references, or increased surveillance.

Records Retention

The District shall retain copies of allegations, investigation reports, and related records regarding any prohibited conduct in accordance with the District's records control schedules, but for no less than the minimum amount of time required by law. [See CPC]

[For Title IX recordkeeping and retention provisions, see FFH(LEGAL) and the District's Title IX formal complaint process.]

Wimberley ISD
105905

EMPLOYEE WELFARE
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DIA
(LOCAL)

**Access to Policy and
Procedures**

Information regarding this policy and any accompanying procedures shall be distributed annually to District employees. Copies of the policy and procedures shall be posted on the District's website, to the extent practicable, and readily available at each campus and the District's administrative offices.

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Note: The following legal provisions address [dating violence](#) and sexual harassment. For legal provisions addressing discrimination on the basis of disability, sex, and other protected characteristics, see FB.

Dating Violence

A district shall adopt and implement a dating violence policy to be included in the district improvement plan.

A dating violence policy must:

1. Include a definition of dating violence that includes the intentional use of physical, sexual, verbal, or emotional abuse by a person to harm, threaten, intimidate, or control another person in a dating relationship, as defined by Family Code 71.0021; and
2. Address safety planning, enforcement of protective orders, school-based alternatives to protective orders, training for teachers and administrators, counseling for affected students, and awareness education for students and parents.

Education Code 37.083, .0831 [See BQ]

Note: References to Title IX, part, or subpart in the following legal provisions refer to Title IX and its corresponding regulations.

Sexual Harassment

A district may develop and implement a sexual harassment policy to be included in the district improvement plan. ~~A district shall adopt and implement a dating violence policy to be included in the district improvement plan.—Education Code 37.083, .0831 [See BQ]~~

Sexual abuse of a student by an employee, when there is a connection between the physical sexual activity and the employee's duties and obligations as a district employee, violates a student's constitutional right to bodily integrity. Sexual abuse may include fondling, sexual assault, or sexual intercourse. *U.S. Const. Amend. 14; Doe v. Taylor Indep. Sch. Dist., 15 F.3d 443 (5th Cir. 1994)*

A district's treatment of a complainant or a respondent in response to a formal complaint of sexual harassment of students may constitute discrimination on the basis of sex in violation of under Title IX. 34 C.F.R. 106.45; 20 U.S.C. 1681; 34 C.F.R. 106.11; Franklin v. Gwinnett County Schools, 503 U.S. 60 (1992) [See also FB regarding Title IX]

<u>Designation of Title IX Coordinator</u>	<u>A district must designate and authorize at least one employee to coordinate its efforts to comply with its responsibilities under Title IX, which employee must be referred to as the “Title IX Coordinator.”</u>
<u>Parties Entitled to Notice</u>	<u>The district must notify applicants for admission and employment, students, parents or legal guardians, employees, and all professional organizations holding professional agreements with the district (“Parties Entitled to Notice”) of the name or title, office address, electronic mail address, and telephone number of the employee or employees designated as the Title IX Coordinator.</u> <u>34 C.F.R. 106.8(a)</u>
<u>Reporting</u>	<u>Any person may report sex discrimination, including sexual harassment (whether or not the person reporting is the person alleged to be the victim of conduct that could constitute sex discrimination or sexual harassment), in person, by mail, by telephone, or by electronic mail, using the contact information listed for the Title IX Coordinator, or by any other means that results in the Title IX Coordinator receiving the person’s verbal or written report. Such a report may be made at any time (including during nonbusiness hours) by using the telephone number or electronic mail address, or by mail to the office address, listed for the Title IX Coordinator.</u>
<u>Notification of Policy</u>	<u>A district must notify the Parties Entitled to Notice, above, that the district does not discriminate on the basis of sex in the education program or activity that it operates, and that it is required by Title IX not to discriminate in such a manner. The notification must state that the requirement not to discriminate in the education program or activity extends to admission and employment, and that inquiries about the application of Title IX to such district may be referred to the district’s Title IX Coordinator, to the assistant secretary for civil rights of the Department of Education, or both.</u> <u>34 C.F.R. 106.2(d), .8(b)(1)</u>
<u>Publication Requirements</u>	<u>A district must prominently display the contact information required to be listed for the Title IX Coordinator and the nondiscrimination policy described at Notification of Policy, above, on its website, if any, and in each handbook that it makes available to the Parties Entitled to Notice, above.</u> <u>A district must not use or distribute a publication stating that the district treats applicants, students, or employees differently on the basis of sex except as such treatment is permitted by Title IX.</u> <u>34 C.F.R. 106.8(b)(2)</u>

Note: To distinguish the process described below from the District's general grievance policies [see DGBA, FNG, and GF], this policy refers to the grievance process required by Title IX regulations for responding to formal complaints of sexual harassment as the District's "Title IX formal complaint process."

Complaint
Procedures

A district must adopt and publish procedures that provide for the prompt and equitable resolution of student and employee complaints alleging any action that would be prohibited by Title IX and a Title IX formal complaint process that complies with 34 C.F.R. 106.45 for formal complaints as defined below.

A district must provide notice to the Parties Entitled to Notice, above, of the district's procedures and Title IX formal complaint process, including how to report or file a complaint of sex discrimination, how to report or file a formal complaint of sexual harassment, and how the district will respond.

The requirements of this provision apply only to sex discrimination occurring against a person in the United States.

34 C.F.R. 106.8(c)–(d)

Response to Sexual
Harassment
Definitions

"Actual knowledge" means notice of sexual harassment or allegations of sexual harassment to a district's Title IX Coordinator or any official of the district who has authority to institute corrective measures on behalf of the district, or to any employee of an elementary and secondary school. Imputation of knowledge based solely on vicarious liability or constructive notice is insufficient to constitute actual knowledge. This standard is not met when the only official of the district with actual knowledge is the respondent. The mere ability or obligation to report sexual harassment or to inform a student about how to report sexual harassment, or having been trained to do so, does not qualify an individual as one who has authority to institute corrective measures on behalf of the district. "Notice" as used in this paragraph includes, but is not limited to, a report of sexual harassment to the Title IX Coordinator.

"Complainant" means an individual who is alleged to be the victim of conduct that could constitute sexual harassment.

"Consent" is not defined by the Title IX regulations, nor do the regulations require districts to adopt a particular definition of consent with respect to sexual assault.

"Formal complaint" means a document filed by a complainant or signed by the Title IX Coordinator alleging sexual harassment

against a respondent and requesting that the district investigate the allegation of sexual harassment. At the time of filing a formal complaint, a complainant must be participating in or attempting to participate in the education program or activity of the district with which the formal complaint is filed. A formal complaint may be filed with the Title IX Coordinator in person, by mail, or by electronic mail, by using the contact information required to be listed for the Title IX Coordinator, and by any additional method designated by the district. As used in this paragraph, the phrase “document filed by a complainant” means a document or electronic submission (such as by electronic mail or through an online portal provided for this purpose by the district) that contains the complainant’s physical or digital signature, or otherwise indicates that the complainant is the person filing the formal complaint. Where the Title IX Coordinator signs a formal complaint, the Title IX Coordinator is not a complainant or otherwise a party to a Title IX formal complaint, and must comply with the requirements of the Title IX formal complaint process, including the informal resolution process.

“Respondent” means an individual who has been reported to be the perpetrator of conduct that could constitute sexual harassment.

“Sexual harassment” means conduct on the basis of sex that satisfies one or more of the following:

Definition of Sexual Harassment

~~Sexual harassment of students is conduct that is~~

1. An employee of the district conditioning the provision of an aid, benefit, or service of the district on an individual’s participation in unwelcome sexual conduct;
2. Unwelcome conduct determined by a reasonable person to be so severe, pervasive, and objectively offensive that it ~~can be said to deprive the victim of~~ effectively denies a person equal access to the ~~educational opportunities or benefits provided by the school. Sexual harassment does not include simple acts of teasing and name-calling among school children, however, even when the comments target differences in gender. *Davis v. Monroe County Bd. of Educ.*, 526~~ district’s education program or activity; or
- ~~4.~~3. “Sexual assault” as defined in 20 U.S.C. 1092(f)(6)(A)(v), “dating violence” as defined in 34 U.S.C. ~~629 (1999)C.~~ 12291(a)(10), “domestic violence” as defined in 34 U.S.C. 12291(a)(8), or “stalking” as defined in 34 U.S.C. 12291(a)(30).

“Supportive measures” means nondisciplinary, nonpunitive individualized services offered as appropriate, as reasonably available,

and without fee or charge to the complainant or the respondent before or after the filing of a formal complaint or where no formal complaint has been filed. Such measures are designed to restore or preserve equal access to the district's education program or activity without unreasonably burdening the other party, including measures designed to protect the safety of all parties or the district's educational environment, or deter sexual harassment. Supportive measures may include counseling, extensions of deadlines or other course-related adjustments, modifications of work or class schedules, campus escort services, mutual restrictions on contact between the parties, changes in work or district-provided housing locations, leaves of absence, increased security and monitoring of certain areas of the campus, and other similar measures. The district must maintain as confidential any supportive measures provided to the complainant or respondent, to the extent that maintaining such confidentiality would not impair the ability of the district to provide the supportive measures. The Title IX Coordinator is responsible for coordinating the effective implementation of supportive measures.

34 C.F.R. 106.2, .30(a)

Deliberate
Indifference

A district with actual knowledge of sexual harassment in an education program or activity of the district against a person in the United States, must respond promptly in a manner that is not deliberately indifferent. A district is deliberately indifferent only if its response to sexual harassment is clearly unreasonable in light of the known circumstances.

Education
Program or
Activity

For the purposes of 34 C.F.R. 106.30 [see Definitions, above] and 106.45 [see Process for Title IX Formal Complaint, below], "education program or activity" includes locations, events, or circumstances over which the district exercised substantial control over both the respondent and the context in which the sexual harassment occurs.

34 C.F.R. 106.44(a)

Title IX Coordinator
Response

The Title IX Coordinator must promptly contact the complainant to discuss the availability of supportive measures, consider the complainant's wishes with respect to supportive measures, inform the complainant of the availability of supportive measures with or without the filing of a formal complaint, and explain to the complainant the process for filing a formal complaint. The Title IX Coordinator must respond in this manner with or without a formal complaint. 34 C.F.R. 106.44(b)(1)

Supportive
Measures
Required

A district's response must treat complainants and respondents equitably by offering supportive measures and by following a process that complies with 34 C.F.R. 106.45 [see Process for Title IX Formal Complaint, below] before the imposition of any disciplinary sanctions or other actions that are not supportive measures against a respondent. [For Emergency Removal procedures, see below.]

Constitutional
Restrictions

The Department of Education may not deem a district to have satisfied the district's duty to not be deliberately indifferent under Title IX based on the district's restriction of rights protected under the U.S. Constitution, including the First Amendment, Fifth Amendment, and Fourteenth Amendment.

34 C.F.R. 106.44(a)

Response to a
Formal Complaint

In response to a formal complaint, a district must follow a process that complies with 34 C.F.R. 106.45 [see Process for Title IX Formal Complaint, below]. 34 C.F.R. 106.44(b)(1)

Emergency
Removal

The Title IX regulations do not preclude a district from removing a respondent from the district's education program or activity on an emergency basis, provided that the district:

1. Undertakes an individualized safety and risk analysis;
2. Determines that an immediate threat to the physical health or safety of any student or other individual arising from the allegations of sexual harassment justifies removal; and
3. Provides the respondent with notice and an opportunity to challenge the decision immediately following the removal.

This provision may not be construed to modify any rights under the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act of 1973, or the Americans with Disabilities Act.

34 C.F.R. 106.44(c)

Administrative
Leave

The Title IX regulations do not preclude a district from placing a nonstudent employee respondent on administrative leave during the pendency of a Title IX formal complaint. This provision may not be construed to modify any rights under Section 504 of the Rehabilitation Act of 1973 or the Americans with Disabilities Act. 34 C.F.R. 106.44(d)

Process for Title IX
Formal Complaint

For the purpose of addressing formal complaints of sexual harassment, a district's process must comply with the following requirements. Any provisions, rules, or practices other than those required

by this provision that a district adopts as part of its process for handling formal complaints of sexual harassment must apply equally to both parties. 34 C.F.R. 106.45(b)

A district's Title IX formal complaint process must:

1. Treat complainants and respondents equitably by providing remedies to a complainant where a determination of responsibility for sexual harassment has been made against the respondent, and by following a process that complies with the Title IX regulations before the imposition of any disciplinary sanctions or other actions that are not supportive measures against a respondent. Remedies must be designed to restore or preserve equal access to the district's education program or activity. Such remedies may include the same individualized services described as supportive measures; however, remedies need not be nondisciplinary or nonpunitive and need not avoid burdening the respondent;
2. Require an objective evaluation of all relevant evidence—including both inculpatory and exculpatory evidence—and provide that credibility determinations may not be based on a person's status as a complainant, respondent, or witness;
3. Require that any individual designated by a district as a Title IX Coordinator, investigator, decision-maker, or any person designated by a district to facilitate an informal resolution process, not have a conflict of interest or bias for or against complainants or respondents generally or an individual complainant or respondent. A district must ensure that Title IX Coordinators, investigators, decision-makers, and any person who facilitates an informal resolution process, receive training on the definition of sexual harassment, the scope of the district's education program or activity, how to conduct an investigation and Title IX formal complaint process including hearings, appeals, and informal resolution processes, as applicable, and how to serve impartially, including by avoiding prejudice of the facts at issue, conflicts of interest, and bias. A district must ensure that decision-makers receive training on any technology to be used at a live hearing, if any, and on issues of relevance of questions and evidence, including when questions and evidence about the complainant's sexual predisposition or prior sexual behavior are not relevant. [See Hearings, below] A district also must ensure that investigators receive training on issues of relevance to create an investigative report that fairly summarizes relevant evidence. [See Investigation of a Formal Complaint, below] Any materials used to train Title IX Coordinators, investigators, decision-makers,

- and any person who facilitates an informal resolution process, must not rely on sex stereotypes and must promote impartial investigations and adjudications of formal complaints of sexual harassment;
4. Include a presumption that the respondent is not responsible for the alleged conduct until a determination regarding responsibility is made at the conclusion of the Title IX formal complaint process;
 5. Include reasonably prompt time frames for conclusion of the Title IX formal complaint process, including reasonably prompt time frames for filing and resolving appeals and informal resolution processes if the district offers informal resolution processes, and a process that allows for the temporary delay of the Title IX formal complaint process or the limited extension of time frames for good cause with written notice to the complainant and the respondent of the delay or extension and the reasons for the action. Good cause may include considerations such as the absence of a party, a party's advisor, or a witness; concurrent law enforcement activity; or the need for language assistance or accommodation of disabilities;
 6. Describe the range of possible disciplinary sanctions and remedies or list the possible disciplinary sanctions and remedies that the district may implement following any determination of responsibility;
 7. State whether the standard of evidence to be used to determine responsibility is the preponderance of the evidence standard or the clear and convincing evidence standard, apply the same standard of evidence for formal complaints against students as for formal complaints against employees, including faculty, and apply the same standard of evidence to all formal complaints of sexual harassment;
 8. Include the procedures and permissible bases for the complainant and respondent to appeal;
 9. Describe the range of supportive measures available to complainants and respondents; and
 10. Not require, allow, rely upon, or otherwise use questions or evidence that constitute, or seek disclosure of, information protected under a legally recognized privilege, unless the person holding such privilege has waived the privilege.

34 C.F.R. 106.45(b)(1)

Notice of
Allegations

Upon receipt of a formal complaint, a district must provide the following written notice to the parties who are known:

1. Notice of the district's Title IX formal complaint process, including any informal resolution process.
2. Notice of the allegations of sexual harassment potentially constituting sexual harassment, including sufficient details known at the time and with sufficient time to prepare a response before any initial interview. Sufficient details include:
 - a. The identities of the parties involved in the incident, if known;
 - b. The conduct allegedly constituting sexual harassment; and
 - c. The date and location of the alleged incident, if known.

The written notice must include a statement that the respondent is presumed not responsible for the alleged conduct and that a determination regarding responsibility is made at the conclusion of the Title IX formal complaint process. The written notice must inform the parties that they may have an advisor of their choice, who may be, but is not required to be, an attorney and may inspect and review evidence [see Investigation of a Formal Complaint, below]. The written notice must inform the parties of any provision in the district's code of conduct that prohibits knowingly making false statements or knowingly submitting false information during the Title IX formal complaint process.

If, in the course of an investigation, the district decides to investigate allegations about the complainant or respondent that are not included in the Notice of Allegations, above, the district must provide notice of the additional allegations to the parties whose identities are known.

34 C.F.R. 106.45(b)(2)

Dismissal of a
Formal Complaint

The district must investigate the allegations in a formal complaint. If the conduct alleged in the formal complaint would not constitute sexual harassment even if proved, did not occur in the district's education program or activity, or did not occur against a person in the United States, then the district must dismiss the formal complaint with regard to that conduct for purposes of sexual harassment under Title IX; such a dismissal does not preclude action under another provision of the district's code of conduct.

The district may dismiss the formal complaint or any allegations therein, if at any time during the investigation or hearing: a complainant notifies the Title IX Coordinator in writing that the complainant would like to withdraw the formal complaint or any allegations therein; the respondent is no longer enrolled or employed by the district; or specific circumstances prevent the district from gathering evidence sufficient to reach a determination as to the formal complaint or allegations therein.

Upon a dismissal required or permitted pursuant to 34 C.F.R. 106.45(b)(3), the district must promptly send written notice of the dismissal and reason(s) therefor simultaneously to the parties.

Consolidation of
Formal
Complaints

A district may consolidate formal complaints as to allegations of sexual harassment against more than one respondent, or by more than one complainant against one or more respondents, or by one party against the other party, where the allegations of sexual harassment arise out of the same facts or circumstances. Where a Title IX formal complaint process involves more than one complainant or more than one respondent, references in this provision to the singular “party,” “complainant,” or “respondent” include the plural, as applicable.

34 C.F.R. 106.45(b)(3)–(4)

Investigation of a
Formal Complaint

When investigating a formal complaint and throughout the Title IX formal complaint process, a district must:

1. Ensure that the burden of proof and the burden of gathering evidence sufficient to reach a determination regarding responsibility rest on the district and not on the parties provided that the district cannot access, consider, disclose, or otherwise use a party’s records that are made or maintained by a physician, psychiatrist, psychologist, or other recognized professional or paraprofessional acting in the professional’s or paraprofessional’s capacity, or assisting in that capacity, and which are made and maintained in connection with the provision of treatment to the party, unless the district obtains that party’s voluntary, written consent to do so for a Title IX formal complaint (if a party is not an “eligible student,” as defined in 34 C.F.R. 99.3 then the district must obtain the voluntary, written consent of a “parent,” as defined in 34 C.F.R. 99.3) [see FL(LEGAL) at Education Records];
2. Provide an equal opportunity for the parties to present witnesses, including fact and expert witnesses, and other inculpatory and exculpatory evidence;

3. Not restrict the ability of either party to discuss the allegations under investigation or to gather and present relevant evidence;
4. Provide the parties with the same opportunities to have others present during any Title IX formal complaint proceeding, including the opportunity to be accompanied to any related meeting or proceeding by the advisor of their choice, who may be, but is not required to be, an attorney, and not limit the choice or presence of advisor for either the complainant or respondent in any meeting or Title IX formal complaint proceeding; however, the district may establish restrictions regarding the extent to which the advisor may participate in the proceedings, as long as the restrictions apply equally to both parties;
5. Provide, to a party whose participation is invited or expected, written notice of the date, time, location, participants, and purpose of all hearings, investigative interviews, or other meetings, with sufficient time for the party to prepare to participate;
6. Provide both parties an equal opportunity to inspect and review any evidence obtained as part of the investigation that is directly related to the allegations raised in a formal complaint, including the evidence upon which the district does not intend to rely in reaching a determination regarding responsibility and inculpatory or exculpatory evidence whether obtained from a party or other source, so that each party can meaningfully respond to the evidence prior to conclusion of the investigation. Prior to completion of the investigative report, the district must send to each party and the party's advisor, if any, the evidence subject to inspection and review in an electronic format or a hard copy, and the parties must have at least ten days to submit a written response, which the investigator will consider prior to completion of the investigative report. The district must make all such evidence subject to the parties' inspection and review available at any hearing to give each party equal opportunity to refer to such evidence during the hearing, including for purposes of cross-examination; and
7. Create an investigative report that fairly summarizes relevant evidence and, at least ten days prior to a hearing (if a hearing is required or otherwise provided) or other time of determination regarding responsibility, send to each party and the party's advisor, if any, the investigative report in an electronic format or a hard copy, for their review and written response.

34 C.F.R. 106.45(b)(5)

Hearings

The district's Title IX formal complaint process may, but need not, provide for a hearing. With or without a hearing, after the district has sent the investigative report to the parties pursuant to 34 C.F.R. 106.45(b)(5)(vii) [see Investigation of a Formal Complaint, above] and before reaching a determination regarding responsibility, the decision-maker(s) must afford each party the opportunity to submit written, relevant questions that a party wants asked of any party or witness, provide each party with the answers, and allow for additional, limited follow-up questions from each party. With or without a hearing, questions and evidence about the complainant's sexual predisposition or prior sexual behavior are not relevant, unless such questions and evidence about the complainant's prior sexual behavior are offered to prove that someone other than the respondent committed the conduct alleged by the complainant, or if the questions and evidence concern specific incidents of the complainant's prior sexual behavior with respect to the respondent and are offered to prove consent. The decision-maker(s) must explain to the party proposing the questions any decision to exclude a question as not relevant. 34 C.F.R. 106.45(b)(6)(ii)

Determination
Regarding
Responsibility

The decision-maker(s), who cannot be the same person(s) as the Title IX Coordinator or the investigator(s), must issue a written determination regarding responsibility. To reach this determination, the district must apply the standard of evidence described at Process for Title IX Formal Complaint, above.

The written determination must include:

1. Identification of the allegations potentially constituting sexual harassment;
2. A description of the procedural steps taken from the receipt of the formal complaint through the determination, including any notifications to the parties, interviews with parties and witnesses, site visits, methods used to gather other evidence, and hearings held;
3. Findings of fact supporting the determination;
4. Conclusions regarding the application of the district's code of conduct to the facts;
5. A statement of, and rationale for, the result as to each allegation, including a determination regarding responsibility, any disciplinary sanctions the district imposes on the respondent, and whether remedies designed to restore or preserve equal access to the district's education program or activity will be provided by the district to the complainant; and

6. The district's procedures and permissible bases for the complainant and respondent to appeal.

The district must provide the written determination to the parties simultaneously. The determination regarding responsibility becomes final either on the date that the district provides the parties with the written determination of the result of the appeal, if an appeal is filed, or if an appeal is not filed, the date on which an appeal would no longer be considered timely.

34 C.F.R. 106.45(b)(7)(i)–(ii)

Implementation
of Remedies

The Title IX Coordinator is responsible for effective implementation of any remedies. 34 C.F.R. 106.45(b)(7)(iv)

Appeals

A district must offer both parties an appeal from a determination regarding responsibility, and from a district's dismissal of a formal complaint or any allegations therein, on the following bases:

1. Procedural irregularity that affected the outcome of the matter;
2. New evidence that was not reasonably available at the time the determination regarding responsibility or dismissal was made, that could affect the outcome of the matter; and
3. The Title IX Coordinator, investigator(s), or decision-maker(s) had a conflict of interest or bias for or against complainants or respondents generally or the individual complainant or respondent that affected the outcome of the matter.

A district may offer an appeal equally to both parties on additional bases.

As to all appeals, the district must:

1. Notify the other party in writing when an appeal is filed and implement appeal procedures equally for both parties;
2. Ensure that the decision-maker(s) for the appeal is not the same person as the decision-maker(s) that reached the determination regarding responsibility or dismissal, the investigator(s), or the Title IX Coordinator;
3. Ensure that the decision-maker(s) for the appeal complies with the standards in the Title IX regulations regarding conflict of interest and bias [see Process for Formal Title IX Complaint, item 3, above];
4. Give both parties a reasonable, equal opportunity to submit a written statement in support of, or challenging, the outcome;

5. Issue a written decision describing the result of the appeal and the rationale for the result; and
6. Provide the written decision simultaneously to both parties.

34 C.F.R. 106.45(b)(8)

Informal
Resolution

A district may not require as a condition of enrollment or continuing enrollment, or employment or continuing employment, or enjoyment of any other right, waiver of the right to an investigation and adjudication of formal complaints of sexual harassment consistent with Title IX. Similarly, a district may not require the parties to participate in an informal resolution process and may not offer an informal resolution process unless a formal complaint is filed. However, at any time prior to reaching a determination regarding responsibility the district may facilitate an informal resolution process, such as mediation, that does not involve a full investigation and adjudication, provided that the district:

1. Provides to the parties a written notice disclosing:
 - a. The allegations;
 - b. The requirements of the informal resolution process including the circumstances under which it precludes the parties from resuming a formal complaint arising from the same allegations, provided, however, that at any time prior to agreeing to a resolution, any party has the right to withdraw from the informal resolution process and resume the Title IX formal complaint process with respect to the formal complaint; and
 - c. Any consequences resulting from participating in the informal resolution process, including the records that will be maintained or could be shared;
2. Obtains the parties' voluntary, written consent to the informal resolution process; and
3. Does not offer or facilitate an informal resolution process to resolve allegations that an employee sexually harassed a student.

34 C.F.R. 106.45(b)(9)

**Employee-Student
Sexual Harassment**

~~A district official who has authority to address alleged harassment by employees on the district's behalf shall take corrective measures to address the harassment or abuse. Gebser v. Lago Vista Indep. Sch. Dist., 118 S.Ct. 1989 524 U.S. 274 (1998); Doe v. Taylor Indep. Sch. Dist., 15 F.3d 443 (5th Cir. 1994)~~

**Student-Student
Sexual Harassment**

~~A district must reasonably respond to known student-on-student harassment where the harasser is under the district's disciplinary authority. *Davis v. Monroe County Bd. of Educ.*, 526 U.S. 629 (1999)~~

Recordkeeping

A district must maintain for a period of seven years records of:

1. Each sexual harassment investigation including any determination regarding responsibility, any disciplinary sanctions imposed on the respondent, and any remedies provided to the complainant designed to restore or preserve equal access to the district's education program or activity;
2. Any appeal and the result therefrom;
3. Any informal resolution and the result therefrom; and
4. All materials used to train Title IX Coordinators, investigators, decision-makers, and any person who facilitates an informal resolution process. A district must make these training materials publicly available on its website or if the district does not maintain a website the district must make these materials available upon request for inspection by members of the public.

For each response required under Title IX Coordinator Response, above, a district must create, and maintain for a period of seven years, records of any actions, including any supportive measures, taken in response to a report or formal complaint of sexual harassment. In each instance, the district must document the basis for its conclusion that its response was not deliberately indifferent, and document that it has taken measures designed to restore or preserve equal access to the district's education program or activity.

If a district does not provide a complainant with supportive measures, then the district must document the reasons why such a response was not clearly unreasonable in light of the known circumstances. The documentation of certain bases or measures does not limit the district in the future from providing additional explanations or detailing additional measures taken.

34 C.F.R. 106.45(b)(10)

Retaliation
Prohibited

No district or other person may intimidate, threaten, coerce, or discriminate against any individual for the purpose of interfering with any right or privilege secured by Title IX, or because the individual has made a report or complaint, testified, assisted, or participated or refused to participate in any manner in an investigation, proceeding, or hearing under Title IX.

Intimidation, threats, coercion, or discrimination, including charges against an individual for code of conduct violations that do not involve sex discrimination or sexual harassment, but arise out of the same facts or circumstances as a report or complaint of sex discrimination, or a report or formal complaint of sexual harassment, for the purpose of interfering with any right or privilege secured by Title IX, constitutes retaliation.

Complaints alleging retaliation may be filed according to the Process for Title IX Formal Complaint above.

The exercise of rights protected under the First Amendment does not constitute retaliation prohibited by Title IX.

Charging an individual with a code of conduct violation for making a materially false statement in bad faith in the course of a Title IX formal complaint proceeding does not constitute retaliation prohibited by Title IX, provided, however, that a determination regarding responsibility, alone, is not sufficient to conclude that any party made a materially false statement in bad faith.

34 C.F.R. 106.71(a)–(b)

Confidentiality

The district must keep confidential the identity of any individual who has made a report or complaint of sex discrimination, including any individual who has made a report or filed a formal complaint of sexual harassment, any complainant, any individual who has been reported to be the perpetrator of sex discrimination, any respondent, and any witness, except as may be permitted by the Family Educational Rights and Privacy Act (FERPA) statute, 20 U.S.C. 1232g, or FERPA regulations, 34 C.F.R. part 99, or as required by law, or to carry out the purposes of 34 C.F.R. part 106, including the conduct of any investigation, hearing, or judicial proceeding arising thereunder. 34 C.F.R. 106.71(a)

Note: This policy addresses discrimination, harassment, and retaliation against District students. For provisions regarding discrimination, harassment, and retaliation against District employees, see DIA. For reporting requirements related to child abuse and neglect, see FFG. Note that FFH shall be used in conjunction with FFI (bullying) for certain prohibited conduct.

Statement of Nondiscrimination

The District prohibits discrimination, including harassment, against any student on the basis of race, color, religion, sex, gender, national origin, age, disability, or any other basis prohibited by law. The District prohibits dating violence, as defined by this policy. Retaliation against anyone involved in the complaint process is a violation of District policy and is prohibited.

Discrimination

Discrimination against a student is defined as conduct directed at a student on the basis of race, color, religion, sex, gender, national origin, age, disability, or any other basis prohibited by law, that adversely affects the student.

Prohibited Conduct

In this policy, the term “prohibited conduct” includes discrimination, harassment, dating violence, and retaliation as defined by this policy, even if the behavior does not rise to the level of unlawful conduct.

Prohibited conduct also includes sexual harassment as defined by Title IX. [See FFH(LEGAL)]

Prohibited Harassment

Prohibited harassment of a student is defined as physical, verbal, or nonverbal conduct based on the student’s race, color, religion, sex, gender, national origin, age, disability, or any other basis prohibited by law, when the conduct is so severe, persistent, or pervasive that the conduct:

1. Affects a student’s ability to participate in or benefit from an educational program or activity, or creates an intimidating, threatening, hostile, or offensive educational environment;
2. Has the purpose or effect of substantially or unreasonably interfering with the student’s academic performance; or
3. Otherwise adversely affects the student’s educational opportunities.

Prohibited harassment includes dating violence as defined by law and this policy.

Examples

Examples of prohibited harassment may include offensive or derogatory language directed at another person’s religious beliefs or

practices, accent, skin color, or need for accommodation; threatening, intimidating, or humiliating conduct; offensive jokes, name calling, slurs, or rumors; cyberharassment; physical aggression or assault; display of graffiti or printed material promoting racial, ethnic, or other negative stereotypes; or other kinds of aggressive conduct such as theft or damage to property.

Sex-Based Harassment

As required by law, the District shall follow the procedures below at Response to Sexual Harassment—Title IX upon a report of sex-based harassment, including sexual harassment, gender-based harassment, and dating violence, when such allegations, if proved, would meet the definition of sexual harassment under Title IX. [See FFH(LEGAL)]

**Sexual Harassment
By an Employee**

Sexual harassment of a student by a District employee includes both welcome and unwelcome sexual advances; requests for sexual favors; sexually motivated physical, verbal, or nonverbal conduct; or other conduct or communication of a sexual nature when:

1. A District employee causes the student to believe that the student must submit to the conduct in order to participate in a school program or activity, or that the employee will make an educational decision based on whether or not the student submits to the conduct; or
2. The conduct is so severe, persistent, or pervasive that it:
 - a. Affects the student's ability to participate in or benefit from an educational program or activity, or otherwise adversely affects the student's educational opportunities; or
 - b. Creates an intimidating, threatening, hostile, or abusive educational environment.

Romantic or other inappropriate social relationships between students and District employees are prohibited. Any sexual relationship between a student and a District employee is always prohibited, even if consensual. [See DH]

By Others

Sexual harassment of a student, including harassment committed by another student, includes unwelcome sexual advances; requests for sexual favors; or sexually motivated physical, verbal, or nonverbal conduct when the conduct is so severe, persistent, or pervasive that it:

1. Affects a student's ability to participate in or benefit from an educational program or activity, or creates an intimidating, threatening, hostile, or offensive educational environment;

2. Has the purpose or effect of substantially or unreasonably interfering with the student's academic performance; or
3. Otherwise adversely affects the student's educational opportunities.

Examples

Examples of sexual harassment of a student may include sexual advances; touching intimate body parts or coercing physical contact that is sexual in nature; jokes or conversations of a sexual nature; and other sexually motivated conduct, contact, or communications, including electronic communication.

Necessary or permissible physical contact such as assisting a child by taking the child's hand, comforting a child with a hug, or other physical contact not reasonably construed as sexual in nature is not sexual harassment.

Gender-Based Harassment

Gender-based harassment includes physical, verbal, or nonverbal conduct based on the student's gender, the student's expression of characteristics perceived as stereotypical for the student's gender, or the student's failure to conform to stereotypical notions of masculinity or femininity. For purposes of this policy, gender-based harassment is considered prohibited harassment if the conduct is so severe, persistent, or pervasive that the conduct:

1. Affects a student's ability to participate in or benefit from an educational program or activity, or creates an intimidating, threatening, hostile, or offensive educational environment;
2. Has the purpose or effect of substantially or unreasonably interfering with the student's academic performance; or
3. Otherwise adversely affects the student's educational opportunities.

Examples

Examples of gender-based harassment directed against a student, regardless of the student's or the harasser's actual or perceived sexual orientation or gender identity, may include offensive jokes, name-calling, slurs, or rumors; cyberharassment; physical aggression or assault; threatening or intimidating conduct; or other kinds of aggressive conduct such as theft or damage to property.

Dating Violence

Dating violence occurs when a person in a current or past dating relationship uses physical, sexual, verbal, or emotional abuse to harm, threaten, intimidate, or control the other person in the relationship. Dating violence also occurs when a person commits these acts against a person in a marriage or dating relationship with the individual who is or was once in a marriage or dating relationship with the person committing the offense.

For purposes of this policy, dating violence is considered prohibited harassment if the conduct is so severe, persistent, or pervasive that the conduct:

1. Affects a student's ability to participate in or benefit from an educational program or activity, or creates an intimidating, threatening, hostile, or offensive educational environment;
2. Has the purpose or effect of substantially or unreasonably interfering with the student's academic performance; or
3. Otherwise adversely affects the student's educational opportunities.

Examples

Examples of dating violence against a student may include physical or sexual assaults; name-calling; put-downs; or threats directed at the student, the student's family members, or members of the student's household. Additional examples may include destroying property belonging to the student, threatening to commit suicide or homicide if the student ends the relationship, attempting to isolate the student from friends and family, stalking, threatening a student's spouse or current dating partner, or encouraging others to engage in these behaviors.

Reporting Procedures

Student Report

Any student who believes that he or she has experienced prohibited conduct or believes that another student has experienced prohibited conduct should immediately report the alleged acts to a teacher, school counselor, principal, other District employee, or the appropriate District official listed in this policy.

Employee Report

Any District employee who suspects or receives direct or indirect notice that a student or group of students has or may have experienced prohibited conduct shall immediately notify the appropriate District official listed in this policy and take any other steps required by this policy.

Definition of District Officials

For the purposes of this policy, District officials are the Title IX coordinator, the ADA/Section 504 coordinator, and the Superintendent.

*Title IX
Coordinator*

Reports of discrimination based on sex, including sexual harassment, gender-based harassment, or dating violence, may be directed to the designated Title IX coordinator for students. [See FFH(EXHIBIT)]

*ADA /
Section 504
Coordinator*

Reports of discrimination based on disability may be directed to the designated ADA/Section 504 coordinator for students. [See FFH(EXHIBIT)]

Superintendent

The Superintendent shall serve as coordinator for purposes of District compliance with all other nondiscrimination laws.

Alternative Reporting Procedures

An individual shall not be required to report prohibited conduct to the person alleged to have committed the conduct. Reports concerning prohibited conduct, including reports against the Title IX coordinator or ADA/Section 504 coordinator, may be directed to the Superintendent.

A report against the Superintendent may be made directly to the Board. If a report is made directly to the Board, the Board shall appoint an appropriate person to conduct an investigation.

Timely Reporting

To ensure the District's prompt investigation, reports of prohibited conduct shall be made as soon as possible after the alleged act or knowledge of the alleged act.

Notice to Parents

The District official or designee shall promptly notify the parents of any student alleged to have experienced prohibited conduct by a District employee or another adult.

[For parental notification requirements regarding an allegation of educator misconduct with a student, see FFF.]

Investigation of Reports Other Than Title IX

The following procedures apply to all allegations of prohibited conduct other than allegations of harassment prohibited by Title IX. [See FFH(LEGAL)] For allegations of sex-based harassment that, if proved, would meet the definition of sexual harassment under Title IX, including sexual harassment, gender-based harassment, and dating violence, see the procedures below at Response to Sexual Harassment—Title IX.

The District may request, but shall not require, a written report. If a report is made orally, the District official shall reduce the report to written form.

Initial Assessment

Upon receipt or notice of a report, the District official shall determine whether the allegations, if proved, would constitute prohibited conduct as defined by this policy. If so, the District shall immediately undertake an investigation, except as provided below at Criminal Investigation.

If the District official determines that the allegations, if proved, would not constitute prohibited conduct as defined by this policy, the District official shall refer the complaint for consideration under FFI.

Interim Action

If appropriate and regardless of whether a criminal or regulatory investigation regarding the alleged conduct is pending, the District shall promptly take interim action calculated to address prohibited conduct or bullying prior to the completion of the District's investigation.

STUDENT WELFARE
FREEDOM FROM DISCRIMINATION, HARASSMENT, AND RETALIATION

FFH
(LOCAL)

District Investigation	<p>The investigation may be conducted by the District official or a designee, such as the principal, or by a third party designated by the District, such as an attorney. When appropriate, the principal shall be involved in or informed of the investigation.</p> <p>The investigation may consist of personal interviews with the person making the report, the person against whom the report is filed, and others with knowledge of the circumstances surrounding the allegations. The investigation may also include analysis of other information or documents related to the allegations.</p>
Criminal Investigation	<p>If a law enforcement or regulatory agency notifies the District that a criminal or regulatory investigation has been initiated, the District shall confer with the agency to determine if the District investigation would impede the criminal or regulatory investigation. The District shall proceed with its investigation only to the extent that it does not impede the ongoing criminal or regulatory investigation. After the law enforcement or regulatory agency has finished gathering its evidence, the District shall promptly resume its investigation.</p>
Concluding the Investigation	<p>Absent extenuating circumstances, such as a request by a law enforcement or regulatory agency for the District to delay its investigation, the investigation should be completed within ten District business days from the date of the report; however, the investigator shall take additional time if necessary to complete a thorough investigation.</p> <p>The investigator shall prepare a written report of the investigation. The report shall include a determination of whether prohibited conduct or bullying occurred. The report shall be filed with the District official overseeing the investigation.</p>
<i>Notification of Outcome</i>	<p>Notification of the outcome of the investigation shall be provided to both parties in compliance with FERPA.</p>
District Action <i>Prohibited Conduct</i>	<p>If the results of an investigation indicate that prohibited conduct occurred, the District shall promptly respond by taking appropriate disciplinary action in accordance with the Student Code of Conduct and may take corrective action reasonably calculated to address the conduct.</p>
Corrective Action	<p>Examples of corrective action may include a training program for those involved in the report, a comprehensive education program for the school community, counseling to the victim and the student who engaged in prohibited conduct, follow-up inquiries to determine if any new incidents or any instances of retaliation have occurred, involving parents and students in efforts to identify problems and improve the school climate, increasing staff monitoring of</p>

STUDENT WELFARE
FREEDOM FROM DISCRIMINATION, HARASSMENT, AND RETALIATION

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(LOCAL)

	areas where prohibited conduct has occurred, and reaffirming the District's policy against discrimination and harassment.
<i>Bullying</i>	If the results of an investigation indicate that bullying occurred, as defined by FFH, the District official shall refer to FFH for appropriate notice to parents and District action. The District official shall refer to FDB for transfer provisions.
<i>Improper Conduct</i>	If the investigation reveals improper conduct that did not rise to the level of prohibited conduct or bullying, the District may take disciplinary action in accordance with the Student Code of Conduct or other corrective action reasonably calculated to address the conduct.
Confidentiality	To the greatest extent possible, the District shall respect the privacy of the complainant, persons against whom a report is filed, and witnesses. Limited disclosures may be necessary in order to conduct a thorough investigation and comply with applicable law.
Appeal	A student or parent who is dissatisfied with the outcome of the investigation may appeal through FNG(LOCAL), beginning at the appropriate level. A student or parent shall be informed of his or her right to file a complaint with the United States Department of Education Office for Civil Rights.
Response to Sexual Harassment–Title IX	For purposes of the District's response to reports of harassment prohibited by Title IX, definitions can be found in FFH(LEGAL).
General Response	<p>When the District receives notice or an allegation of conduct that, if proved, would meet the definition of sexual harassment under Title IX, the Title IX coordinator shall promptly contact the complainant to:</p> <ul style="list-style-type: none">• Discuss the availability of supportive measures and inform the complainant that they are available, with or without the filing of a formal complaint;• Consider the complainant's wishes with respect to supportive measures; and• Explain to the complainant the option and process for filing a formal complaint. <p>The District's response to sexual harassment shall treat complainants and respondents equitably by offering supportive measures to both parties, as appropriate, and by following the Title IX formal complaint process before imposing disciplinary sanctions or other actions that are not supportive measures against a respondent.</p>

STUDENT WELFARE
FREEDOM FROM DISCRIMINATION, HARASSMENT, AND RETALIATION

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If a formal complaint is not filed, the District reserves the right to investigate and respond to prohibited conduct in accordance with Board policies and the Student Code of Conduct.

Title IX Formal
Complaint Process

To distinguish the process described below from the District's general grievance policies [see DGBA, FNG, and GF], this policy refers to the grievance process required by Title IX regulations for responding to formal complaints of sexual harassment as the District's "Title IX formal complaint process."

The Superintendent shall ensure the development of a Title IX formal complaint process that complies with legal requirements. [See FFH(LEGAL)] The formal complaint process shall be posted on the District's website. In compliance with Title IX regulations, the District's Title IX formal complaint process shall address the following basic requirements:

1. Equitable treatment of complainants and respondents;
2. An objective evaluation of all relevant evidence;
3. A requirement that the Title IX coordinator, investigator, decision-maker, or any person designated to facilitate an informal resolution process not have a conflict of interest or bias;
4. A presumption that the respondent is not responsible for the alleged sexual harassment until a determination is made at the conclusion of the Title IX formal complaint process;
5. Time frames that provide for a reasonably prompt conclusion of the Title IX formal complaint process, including time frames for appeals and any informal resolution process, and that allow for temporary delays or the limited extension of time frames with good cause and written notice as required by law;
6. A description of the possible disciplinary sanctions and remedies that may be implemented following a determination of responsibility for the alleged sexual harassment;
7. A statement of the standard of evidence to be used to determine responsibility for all Title IX formal complaints of sexual harassment;
8. Procedures and permissible bases for the complainant and respondent to appeal a determination of responsibility or a dismissal of a Title IX formal complaint or any allegations therein;
9. A description of the supportive measures available to the complainant and respondent;

10. A prohibition on using or seeking information protected under a legally recognized privilege unless the individual holding the privilege has waived the privilege;
11. Additional formal complaint procedures in 34 C.F.R. 106.45(b), including written notice of a formal complaint, consolidation of formal complaints, recordkeeping, and investigation procedures; and
12. Other local procedures as determined by the Superintendent.

Standard of Evidence

The standard of evidence used to determine responsibility in a Title IX formal complaint of sexual harassment shall be the preponderance of the evidence.

Retaliation

The District prohibits retaliation by a student or District employee against a student alleged to have experienced discrimination or harassment, including dating violence, or another student who, in good faith, makes a report of harassment or discrimination, files a complaint of harassment or discrimination, serves as a witness, or participates in an investigation. The definition of prohibited retaliation under this policy also includes retaliation against a student who refuses to participate in any manner in an investigation under Title IX.

Examples

Examples of retaliation may include threats, intimidation, coercion, rumor spreading, ostracism, assault, destruction of property, unjustified punishments, or unwarranted grade reductions. Unlawful retaliation does not include petty slights or annoyances.

False Claim

A student who intentionally makes a false claim or offers false statements in a District investigation regarding discrimination or harassment, including dating violence, shall be subject to appropriate disciplinary action in accordance with law.

Records Retention

The District shall retain copies of allegations, investigation reports, and related records regarding any prohibited conduct in accordance with the District's records control schedules, but for no less than the minimum amount of time required by law. [See CPC]

[For Title IX recordkeeping and retention provisions, see FFH(LEGAL) and the District's Title IX formal complaint process.]

Access to Policy and Procedures

Information regarding this policy and any accompanying procedures shall be distributed annually in the employee and student handbooks. Copies of the policy and procedures shall be posted on the District's website, to the extent practicable, and readily available at each campus and the District's administrative offices.

RESOLUTION FROM DISSEMINATION, HARASSMENT, AND RETALIATION (LOCAL 477)

11. A resolution on the topic of seeking information on local unions
12. Local unions should be held to the same standards as the local union
13. The local union should be held to the same standards as the local union

14. A resolution on the topic of seeking information on local unions
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39. Local unions should be held to the same standards as the local union
40. The local union should be held to the same standards as the local union

Resolution

Resolution

Resolution

Resolution

Resolution

Resolution

Dottie Busby

Board Request - Olson

From: Howard, Dee <dee.howard@wimberleyisd.net> on behalf of Howard, Dee
Sent: Tuesday, August 18, 2020 11:40 AM
To: Lori Olson; Ken Strange; Campbell, Rob; Traci Maxwell; Will Conley; Dwain York; Joe Malone; Dottie Busby
Subject: Re: agenda item request for Sept
Attachments: DIA (LEGAL) Update 115-Annotated page 347-349.pdf; FFH (LEGAL) Update 115 Annotated page 591-608.pdf; Policy DIA (LOCAL) Update 115.pdf; Policy FFH (LOCAL) Update 115.pdf; Update 155 Vantage Points.pdf
Categories: Yellow Category

Lori,

Here are the documents that you requested. The two annotated sets of pages are the LEGAL policies that were put into effect by TASB. The LOCAL policies that correspond are what the TASB attorneys and policy teams put together for our district for approval.

Update 115 will be on the September agenda.

Have a good day,

Dee

On Mon, Aug 17, 2020 at 8:01 PM Lori Olson <loriolson4wisd@gmail.com> wrote:

Dwain and Joe,

In line with the policy changes that were punted to the September meeting, and to bring our Local policies in line with our updated Legal policies regarding discrimination language, I officially request an additional, separate agenda item for the September meeting for the board to review policy FFH Local, with possible action to amend it.

For the suggested amendment, please provide documentation including a redline with the EXACT SAME changes that are proposed by TASB for Employee discrimination (DIA Local) for our Student discrimination policy (FFH Local). Please provide this via email ASAP, and place in the board materials, so that we may consider updating our student discrimination policy alongside our employee discrimination policy, in order to provide our students with the same level of discriminatory protections as our employees.

Best,
Lori

Lori Olson
Wimberley I.S.D. School Board Member, Place 1
loriolson4wisd@gmail.com

Introduction

The purpose of this document is to set forth specific investment policy and strategy guidelines for the District in order to achieve the goals of safety, liquidity, yield, and public trust for all investment activity. The Board of the District shall review the investment policy annually. This policy serves to satisfy the statutory requirement [specifically the Public Funds Investment Act, Texas Government Code, Chapter 2256, subchapter A the "Act"] to define, adopt and review a formal investment strategy and policy.

Investment Strategy

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 and consider preservation and safety of principal, liquidity, marketability of an investment if the need arises to liquidate before maturity, diversification of the investment portfolio, and yield. The District shall maintain portfolios that utilize specific investment strategy considerations designed to address the unique characteristics of the fund groups represented in the portfolios:

1. Investment strategies for operating funds, which include the general fund and the special revenue funds, have as their primary objective to ensure that anticipated cash flows are matched with adequate investment liquidity. The secondary objective is to create a portfolio structure that will experience minimal volatility during economic cycles. This may be accomplished by purchasing high quality, short to medium term securities, which will complement each other. Settlement of all transactions involving operating funds, except investment pool funds and mutual funds, will be made on a delivery rather than payment basis.
2. Investment strategies for debt service funds have as their primary objective the assurance of investment liquidity adequate to cover the debt service obligation on the required payment date. Settlement of all transactions involving debt service funds, except investment pool funds and mutual funds, will be made on a delivery rather than payment basis.
3. Investment strategies for capital projects funds have as their primary objective to assure that anticipated cash flows are matched with adequate investment liquidity. These portfolios should include at least ten percent in highly liquid securities to allow for flexibility and unanticipated project outlays. The stated final maturity dates of securities held should not exceed the estimated project completion date. Settlement of all transactions involving capital projects, except investment pool funds and mutual funds, will be made on a delivery rather than payment basis.

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4. Investment strategies for custodial funds have as their primary objective preservation and safety of principal, investment liquidity, and maturity sufficient to meet anticipated cash flow requirements. Settlement of all transactions involving custodial funds, except investment pool funds and mutual funds, will be made on a delivery rather than payment basis.
5. Investment strategies for enterprise funds have as their primary objective preservation and safety of principal, investment liquidity, and maturity sufficient to meet anticipated cash flow requirements. Settlement of all transactions involving custodial funds, except investment pool funds and mutual funds, will be made on a delivery rather than 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.

The District may invest its funds through an eligible investment pool only if the particular pool is approved by resolution of the Wimberley Independent School District Board of Trustees.

Scope

This investment policy applies to all financial assets under the direct authority of the District. These funds are accounted for in the District's annual financial report and include:

1. General Funds
2. Special Revenue Funds
3. Debt Service Funds
4. Trust and Custodial Funds
5. Capital Projects Funds
6. Enterprise Funds

Objectives

The objectives and priorities of the investment policy of the District are as follows:

1. To comply with the laws of the state of Texas as defined in Government Code 10, Chapter 2256, known as the "Public Funds Investment Act."
2. To provide for the safety and principal of all District funds.
3. To provide sufficient funds to meet the cash needs of the continuing operations of the District.
4. To earn the highest possible rates of return on investments consistent with the foregoing objectives and guidelines.
5. To allow for diversification in the types, issues, and maturities of investments in order to avoid incurring unreasonable and avoidable risks.
6. To maintain the highest professional and ethical standards as custodians of the public trust.

**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.

**Responsibility and
Control**

The Superintendent and the business manager are designated as investment officers of the District and are responsible for investment decisions and activities as directed by the Board. They shall establish and maintain written procedures for the operation of the investment program consistent with the investment policy. The investment officers shall attend at least one training session relating

to the officer's responsibilities under the Act within 12 months of assuming duties.

Interest Rate Risk

To reduce exposure to changes in interest rates that could adversely 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

The investment officers are responsible for establishing and maintaining an internal control structure designed to ensure that the assets of the District are protected from loss, theft, or misuse. Accordingly, the investment officers shall establish a process for annual independent review by an external auditor to assure compliance with policies and procedures. The internal controls shall address the following points:

1. Control of collusion.
2. Separation of transaction authority from accounting and recordkeeping and electronic transfer of funds.
3. Custodial safekeeping.
4. Avoidance of bearer-form securities.
5. Clear delegation of authority.
6. Written confirmation of telephone transactions for investments and wire transfers.

Prudence

The standard of prudence to be applied by the investment officers shall be the "prudent investor rule," which states, "Investments shall be made with judgment and care, under circumstances then prevailing, which persons of prudence, discretion and intelligence exercise in the management of their own affairs, not for speculation, but for investment, considering the probable safety of their capital as well as the probable income to be derived." In determining whether an investment officer has exercised prudence with respect to an investment decision, the determination shall be made taking into consideration:

1. The investment of all funds under the District's control over which the investment officer has responsibility, rather than a consideration of the prudence of a single investment.
2. Whether the investment decision was consistent with the written investment policy of the District.

Ethics and Conflicts
of Interest

District staff involved in the investment process shall refrain from personal business activity that could conflict with proper execution of the investment program, or which could impair the ability to make impartial investment decisions. District staff shall disclose to the Superintendent any material financial interests in financial institutions that conduct business with the District, and they shall further disclose positions that could be related to the performance of the District's portfolio. District staff shall subordinate their personal financial transactions to those of the District, particularly with regard to timing of purchases and sale.

An investment officer of the District who has a personal business relationship with an organization seeking to sell an investment to the District shall file a statement disclosing that personal business interest. An investment officer who is related within the second degree of affinity or consanguinity to an individual seeking to sell an investment to the District shall file a statement disclosing that relationship. A statement required under this subsection must be filed with the Texas Ethics Commission and the Board of the District.

**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 at least quarterly, as required by law, and 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.

Quarterly Reporting

The investment officer shall prepare and submit to the Board a signed quarterly investment report for all funds for the preceding reporting period. The report shall:

1. Describe in detail the investment position of the District on the date of the report.
2. Contain a summary statement of each fund that states the beginning market value for the reporting period, additions and changes to the market value during the period, and the ending market value for the period.

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3. State the book value and market value of each separately invested asset at the beginning and end of the reporting period by the type of asset and fund type invested.
4. State the maturity date of each separately invested asset that has a maturity date.
5. Contain a statement of compliance with the District's investment portfolio with state law and the investment strategy and policy approved by the Board.

Investment Portfolio

The District shall pursue an active versus passive portfolio management philosophy. That is, securities may be sold before they mature if market conditions present an opportunity for the District to benefit from the trade. The investment officer will routinely monitor the contents of the portfolio, the available market, and the relative value of competing instruments, and will adjust the portfolio accordingly.

**Investment
Diversification**

It is the intent of the District to diversify the investment instruments within the portfolio to avoid incurring unreasonable risks inherent in over-investing in specific instruments, individual financial institutions, or maturities. The asset allocation in the portfolio should, however, be flexible depending upon the outlook for the economy and the securities markets.

The District recognizes that investment risks can result from issuer defaults, market price changes, or various technical complications leading to temporary illiquidity. Portfolio diversification is employed as a way to control risk. The investment officer is expected to display prudence in the selection of securities as a way to minimize default risk. No individual investment transaction shall be undertaken that jeopardizes the total capital position of the overall portfolio. In the event of default by a specific issuer, the investment officer shall review and, if appropriate, proceed to liquidate securities having comparable credit risks. To control market price risks, volatile investment instruments shall be avoided.

**Investment
Maturities**

The District intends to match the holding periods of investment funds with liquidity needs of the District. In no case will the average maturity of investments of the District funds exceed two years. The maximum final stated maturity of any investment shall not exceed two years.

**Investment
Institutions and
Representatives**

The investment officer shall invest District funds with any or all of the following institutions or groups consistent with federal and state law and the current bank depository contract:

1. Depository banks

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2. Other state or national banks domiciled in Texas that are insured by the FDIC
3. Savings and loan associations domiciled in Texas that are insured by the FSLIC
4. Public funds investment pools
5. Government securities brokers and dealers

The District shall maintain a list of authorized brokers/dealers and financial institutions that are approved for investment purposes. The District shall place investments with and purchase securities only from authorized institutions and firms. A list of institutions that are approved to do business with the District shall be reviewed periodically. Brokers/dealers must be in good standing with the Financial Industry Regulatory Authority (FINRA). Representatives or brokers/dealers shall be registered with the Texas State Securities Board.

The investment officer of the District shall not buy securities from a person who has not delivered to the District an investment policy affidavit acknowledged by the principal of the organization.

**Safekeeping and
Collateralizing**

The District will execute a third-party custodial safekeeping agreement with a commercial bank approved by the Board. All securities purchased and/or collateral obtained by the District shall be properly designated as an asset of the District and held in safekeeping.

**Investment Policy
Adoption**

The District investment policy shall be adopted by resolution of the Board. The policy shall be reviewed for effectiveness on an annual basis.

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.

Wimberley Independent School District

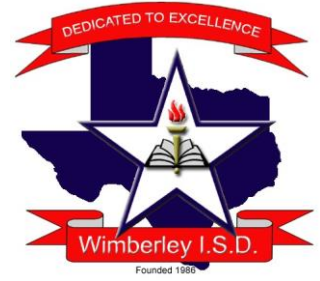
Division of Business Support Services

951FM 2325

Wimberley, Texas 78676

Ph: (512) 847-2414

Fx: (512) 847-2142



Date: September 21, 2020

Monthly Financial Highlights

- The monthly Financial Reports represent financial data through August 31, 2020.
- The cash and investment balances of all governmental and proprietary funds at month end is \$19,303,741. The General Fund makes up the largest portion of that number with \$11,041,065 or roughly 57% and the 2018 Capital Projects \$5,695,518 (30%). The unaudited ending general fund balance is \$9,500,555, which is an increase of \$1,232,756 (15%) over the prior year audited fund balance and a \$2,986,668 (46%) increase over the last two fiscal years. The total number of operating months in fund balance is 4.8 (see page 2).
- Through the end of the month (12/12 or 100% of the budget year):
 - The General Fund has collected \$26,840,171 (101.58% of its budgeted revenue) and has spent \$25,609,221 (97.02% of its budgeted expenditures). (See page 3).
 - The Child Nutrition fund has collected \$708,773 (100.11% of its budgeted revenue) and has spent \$848,071 (93.97% of its budgeted expenditures). The unaudited fund balance is \$163,741, which is a decrease of \$139,298 over the prior year audited fund balance (See page 8).

Now that the instructional year has resumed, but due to the existing pandemic and the student's instructional preference, our meal servings have significantly declined.

- Meals served during the month of August 2020 decreased compared to August 2019 by 56% for total breakfasts and 80% for total lunches (See page 8/9).
- The operating days in August 2020 (9 days) were 3 days less compared to August 2019 (12 days). When converting the meals to those served during an operating day, daily meals decreased by 41% for total breakfasts and total lunches decreased by 73% (See page 8/9).
- The number of children approved for Free Meals in August 2020 increased by 43 (6%) from the prior year. The number of children approved for Reduced Meals in August 2020 increased by 4 (4%) from the prior year. Overall Free/Reduced meal applications increased by 47 (6%) over the same month for the prior year (See page 8/9).
- The Debt Service fund collected \$6,260,915 (99.94% of its budgeted revenue) and spent \$6,033,999 (99.06%) of its budgeted expenditures). The projected increase in fund balance is \$599,216 or 34%. Debt service payments are made twice a year, February 15th and August 15th (See page 9).

NOTE: Due to the refunding of the 2013 Bond Issue there are two bookkeeping entries reflected in the Other Source Revenues in the amount of \$31.5 million and Other Non-Op Expenses in the amount of \$31.1 million. These are only 76per entries and not actual cash in/out flows.

Wimberley Independent School District

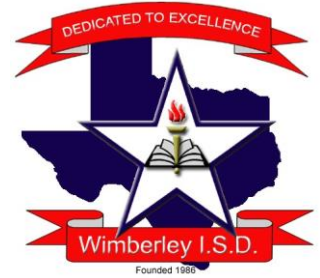
Division of Business Support Services

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- The 2018 Capital Project fund has expended \$28,478,930 in the current fiscal year through the month of August 2020 and has earned \$596,467 in interest revenue. Updates on bond projects are provided regularly by the bond project manager or at the request of the Board. (See page 10)

- Special Revenue funds consist of Federal, State, and local grants received by the District. Some of these grants such as Title I and IDEA are non-competitive grants which the District receives based on certain types of student population reported through PEIMS. Other grants such as the San Marcos Civic Foundation and the Wimberley Education Foundation are competitive grants and are awarded based on demonstrated needs. This group of funds also includes the Textbook (IMA) fund. Total revenue collected is \$1,343,666 and total expenditures spent is \$1,476,991 (See page 11).

- Total proprietary funds (Scudder Afterschool Program, Jacob's Well Afterschool Program and Tuition Based Pre-K Program) revenue collected is \$63,203, \$89,259, and \$247,005 respectively. Total expenditures are \$60,648, \$77,873, and \$241,642 resulting in a net profit of \$2,556, \$11,386, and \$5,363 respectively through the month of August 2020 (See page 12).

- Current Tax collections for the month of August 2020 totaled \$106,266 representing 0.34% of the levy collected during the month. Approximately 99.49% of the total levy has been collected through the end of August 2020 compared to 98.71% the previous year. About 101.93% of the adopted tax collection budget has been realized compared to 100.26% the previous year. YTD tax collections are higher by 1.67 % over the same month for the prior year (See page 13).

- Due to the existing pandemic situation and the student's instructional preference, the number of student's that receive bus transportation services has significantly declined.

During the month of August 2020 there was total of 901 student riders in the morning routes and 1,783 in the afternoon routes with an average number of student riders of 100 in the morning routes and 198 in the afternoon routes. This is a 72% decrease in student ridership in the morning and 59% decrease in the afternoon over the same month for the prior year. The number of operating days during August 2020 (9 days) were 3 days less compared to August 2019 (12 days). The district currently has 15 mornings and 13 afternoon routes with a total daily mileage of 961 (See page 18).

Should have any questions regarding these financials please contact me.

Moises Santiago, RTSBA

Chief Financial Officer

Wimberley Independent School District

Wimberley Independent School District

Financial Reports

August 31, 2020

Wimberley Independent School District
Combined Balance Sheet
for the Month Ending August 31, 2020
(Un-Audited)

	<u>General</u> <u>Fund</u>	<u>Child Nutrition</u> <u>Fund</u>	<u>Debt Service</u> <u>Fund</u>	<u>2018 Capital</u> <u>Projects Funds</u>	<u>Special Revenue</u> <u>Funds</u>	<u>Enterprising</u> <u>Funds</u>	<u>Total</u>
<i>Assets:</i>							
Cash and Cash Equivalents	\$ 804,600.89	\$ 159,348.98	\$ 353,260.78	\$ 209,406.30	\$ (169,885.42)	\$ 194,965.69	\$ 1,551,697.22
Current Investments	10,236,464.38		2,029,467.72	5,486,112.06	-	-	17,752,044.16
Total Cash and Investments	\$ 11,041,065.27	\$ 159,348.98	\$ 2,382,728.50	\$ 5,695,518.36	\$ (169,885.42)	\$ 194,965.69	\$ 19,303,741.38
Property Taxes - Delinquent	714,121.00	-	144,744.00	-	-	-	858,865.00
Allowance for Uncollectible Taxes	(71,412.00)	-	(14,473.00)	-	-	-	(85,885.00)
Accrued Interest	-	-	-	(66,920.35)	-	-	(66,920.35)
Due from State Agencies	266,405.45	6,421.28	-	-	317,767.09	-	590,593.82
Due from other Governments	1,741.39	-	733.17	-	7,958.66	-	10,433.22
Due from Other Funds	22,198.82	-	-	-	-	-	22,198.82
Other Receivables	1,850.55	-	-	-	490.00	-	2,340.55
Total Receivables	\$ 934,905.21	\$ 6,421.28	\$ 131,004.17	\$ (66,920.35)	\$ 326,215.75	\$ -	\$ 1,331,626.06
Inventories	12,380.26	22,085.71	-	-	-	-	34,465.97
Prepaid Items	-	-	-	-	-	-	-
Other Current Assets	\$ 12,380.26	\$ 22,085.71	\$ -	\$ -	\$ -	\$ -	\$ 34,465.97
Total Current Assets	\$ 11,988,350.74	\$ 187,855.97	\$ 2,513,732.67	\$ 5,628,598.01	\$ 156,330.33	\$ 194,965.69	\$ 20,669,833.41
Accounts Payable	\$ 140,113.39	\$ 1,828.08	\$ -	\$ 1,061,285.62	\$ 272,578.36	\$ -	\$ 1,475,805.45
Other Liabilities	-	-	-	-	-	-	-
Payroll Deductions and Withholdings	154,699.70	-	-	-	-	-	154,699.70
Accrued Wages Payable	1,093,274.18	17,094.41	-	-	-	-	1,110,368.59
Due to Other Funds	1,596.99	-	-	-	-	-	1,596.99
Due to State Agencies	-	-	-	-	-	-	-
Due to other Governments	5,898.00	-	-	-	-	-	5,898.00
Accrued Expenses	19,521.00	-	-	365,660.79	-	-	385,181.79
Deferred Revenues	429,983.88	5,190.00	-	-	17,077.70	60,326.40	512,577.98
Deferred Inflows	642,709.00	-	130,271.00	-	-	-	772,980.00
Total Liabilities	\$ 2,487,796.14	\$ 24,112.49	\$ 130,271.00	\$ 1,426,946.41	\$ 289,656.06	\$ 60,326.40	\$ 4,419,108.50
<i>Fund Balance/Equity</i>							
Reserved/Designated Fund Balance		292,501.17	1,784,245.67	31,887,349.26	-	-	33,964,096.10
Reserved for Current Year							
Expenditures/Expenses	9,500,554.60	(128,757.69)	\$ 599,216.00	(27,685,697.66)	(133,325.73)	134,639.29	(17,713,371.19)
Unreserved Fund Balance/Fund Equity	\$ -	-	-	-	-	-	-
Total Fund Balance/Equity	\$ 9,500,554.60	\$ 163,743.48	\$ 2,383,461.67	\$ 4,201,651.60	\$ (133,325.73)	\$ 134,639.29	\$ 16,250,724.91
Total Liabilities and Fund Equity	\$ 11,988,350.74	\$ 187,855.97	\$ 2,513,732.67	\$ 5,628,598.01	\$ 156,330.33	\$ 194,965.69	\$ 20,669,833.41

Wimberley Independent School District
Statement of Revenues, Expenditures, and Changes in Fund Balance
for the Month Ending August 31, 2020
(Un-Audited)

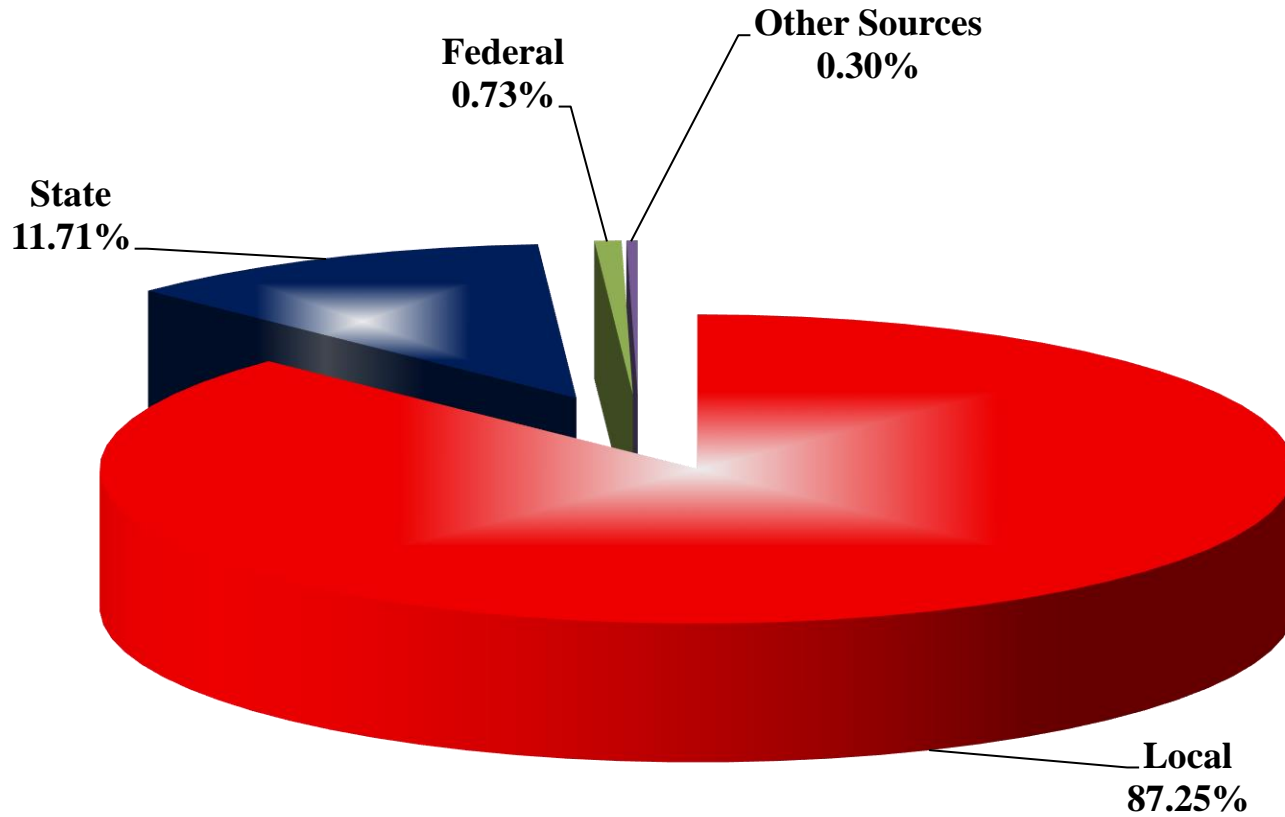
	GENERAL FUND							
	<u>Prior Year</u>					<u>Current Year</u>	<u>Unrealized/</u>	
	<u>Actual Revenues/</u>	<u>Original</u>	<u>Revised</u>	<u>Encumbrances</u>	<u>Actual Revenues/</u>	<u>Unexpended</u>	<u>Budget</u>	<u>Percentage</u>
	<u>Expenditures</u>	<u>Budget</u>	<u>Budget</u>		<u>Expenditures</u>			<u>Y-T-D</u>
Revenues:								
Local	\$ 22,808,797.13	\$ 22,994,070	\$ 23,504,825	\$ -	\$ 23,419,236.91	(85,588.09)		99.64%
State	\$ 3,736,678.64	2,449,618	2,639,012	\$ -	\$ 3,144,030.40	505,018.40		119.14%
Federal	\$ 319,688.48	190,297	197,965	\$ -	\$ 195,965.67	(1,999.33)		98.99%
Other Sources	\$ 57,504.97	50,000	81,000	\$ -	\$ 80,937.85	(62.15)		99.92%
Total Revenues	\$ 26,922,669.22	\$ 25,683,985	\$ 26,422,802	\$ -	\$ 26,840,170.83	\$ 417,369		101.58%
11-Instruction	\$ 11,412,010.84	12,965,775	13,075,662	48,676.40	\$ 12,912,726.50	114,259.10		98.75%
12-Library	\$ 196,513.68	236,668	252,098		\$ 245,571.26	6,526.74		97.41%
13-Prof Dev	\$ 118,771.64	202,783	203,803		\$ 149,160.56	54,642.44		73.19%
21-Instruct Admin	\$ 320,407.73	416,256	419,161		\$ 418,008.08	1,152.92		99.72%
23-Campus Admin	\$ 1,135,198.92	1,167,985	1,330,580		\$ 1,298,522.45	32,057.55		97.59%
31-Counselors	\$ 597,696.72	831,047	849,963		\$ 836,082.58	13,880.42		98.37%
33-Health Services	\$ 237,341.93	300,504	307,502	376.40	\$ 298,700.13	8,425.47		97.14%
34-Transportation	\$ 628,497.01	816,581	883,481	107,580.00	\$ 726,381.48	49,519.52		82.22%
36-Co-Curricular	\$ 1,119,328.73	1,198,590	1,227,697		\$ 1,120,008.02	107,688.98		91.23%
41-Gen Admin	\$ 1,202,046.42	1,417,888	1,648,525		\$ 1,589,847.75	58,677.25		96.44%
51-Maintenance	\$ 2,671,910.11	3,204,700	3,065,987	7,098.56	\$ 2,952,529.72	106,358.72		96.30%
52-Security	\$ 269,089.31	529,029	420,818		\$ 407,978.01	12,839.99		96.95%
53-Data Services	\$ 234,425.47	322,895	374,979		\$ 334,237.47	40,741.53		89.13%
61-Community Services	\$ 33.76	300	50		\$ 22.33	27.67		44.66%
81-Facilities Acquisition & Construction		45,100	55,000		\$ 52,117.54	2,882.46		94.76%
91-Purchase of WADA-Chp 49	\$ 3,951,321.00	1,520,226	2,022,800		\$ 2,022,800.00	-		100.00%
99-Other Intergovernmental charge	\$ 193,825.24	235,000	235,000		\$ 220,564.90	14,435.10		93.86%
00-Other Uses			23,962		\$ 23,962.00			100.00%
Total Expenditures and Other Uses	\$ 24,288,418.51	\$ 25,411,327	\$ 26,397,068	163,731.36	\$ 25,609,220.78	\$ 624,115.86		97.02%
Excess of Revenues Over (Under)								
Expenditures and Other Uses	\$ 2,634,250.71	\$ 272,658	\$ 25,734	(163,731.36)	\$ 1,230,950.05			
Audited Fund Balance September 1, 2019		\$ 8,267,798	\$ 8,267,798	-	\$ 8,267,798.00			
Fund Balance Ending - Monthly Reporting Period		\$ 8,540,456	\$ 8,293,532	(163,731.36)	\$ 9,498,748.05	\$ 1,205,216.05		

Wimberley Independent School District
Detail of Expenditures & Other Uses(Program) - General Fund
for the Month Ending August 31, 2020
(Un-Audited)

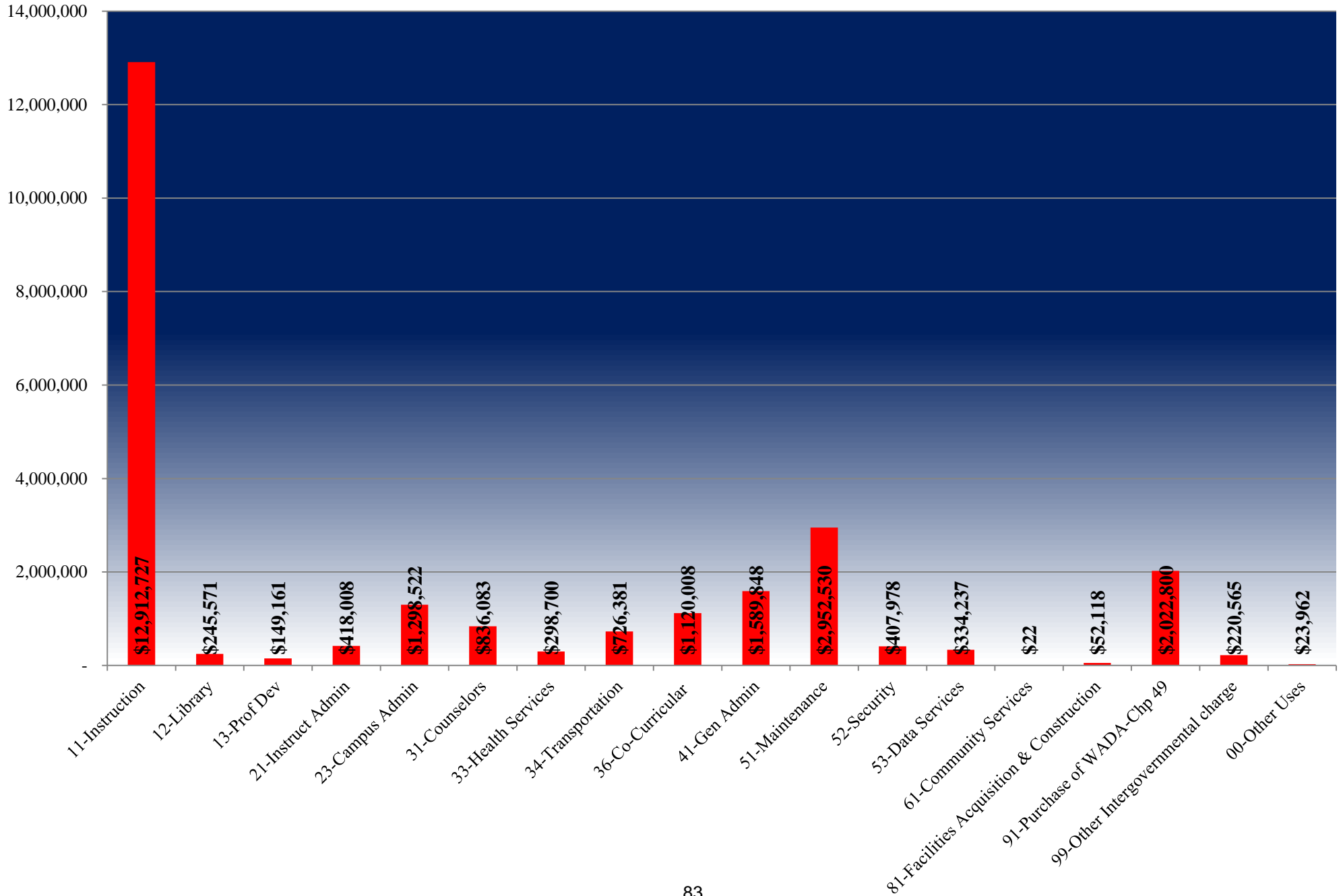
GENERAL FUND

<i>Expenditures and Other Uses by Program Code:</i>	<u>Prior Year</u> <u>Actual Revenues/</u> <u>Expenditures</u>	<u>Original</u> <u>Budget</u>	<u>Revised</u> <u>Budget</u>	<u>Encumbrances</u>	<u>Current Year</u> <u>Actual Revenues/</u> <u>Expenditures</u>	<u>Unrealized/</u> <u>Unexpended</u> <u>Budget</u>	<u>Percentage</u> <u>Y-T-D</u>
11-Basic Educational Services	7,987,669.64	9,016,553	8,954,820	48,676.40	8,912,894.20	(6,750.92)	99.53%
21-Gifted and Talented	175,651.30	226,985	224,146		217,766.34	6,379.66	97.15%
22-Career and Technical	807,404.43	863,230	1,091,786		965,393.85	126,392.15	88.42%
23-Services to Students with Disabilities	1,946,328.95	2,377,184	2,140,674		2,111,486.88	29,187.12	98.64%
24-Accelerated Education	467,257.40	357,834	422,989		423,380.58	(391.58)	100.09%
25-Bilingual Education and Special Language	69,290.68	70,199	57,047		44,205.11	12,842.21	77.49%
28-Disciplinary Alternative Education (DAEP)	92,651.08	100,754	103,128		102,578.60	549.40	99.47%
31-High School Allotment	3,168.61					-	NA
32-Pre-Kindergarten	254,026.47	300,412	289,167		288,572.74	594.26	99.79%
33-Prekindergarten Special Education Services	88,427.63	77,577	75,238		72,117.19	3,120.81	95.85%
35-Prekindergarten Bilingual Services	1,152.32	1,691	1,691		1,661.87	29.13	98.28%
36-Early Education Allotment		165,207	167,557		166,905.52	651.48	99.61%
37-Dyslexia		90,228	98,018		96,109.00	1,909.00	98.05%
38-College, Career & Military Readiness		212,962	221,901		221,050.51	850.49	99.62%
91-Athletics and Related Activities	926,228.30	1,011,737	1,032,986		961,082.11	71,903.89	93.04%
99-Undistributed	11,469,161.70	10,538,774	11,491,958	115,054.96	11,000,054.28	376,848.76	95.72%
Total Expenditures and Other Uses	24,288,418.51	25,411,327	26,373,106	163,731.36	25,585,258.78	624,115.86	97.01%

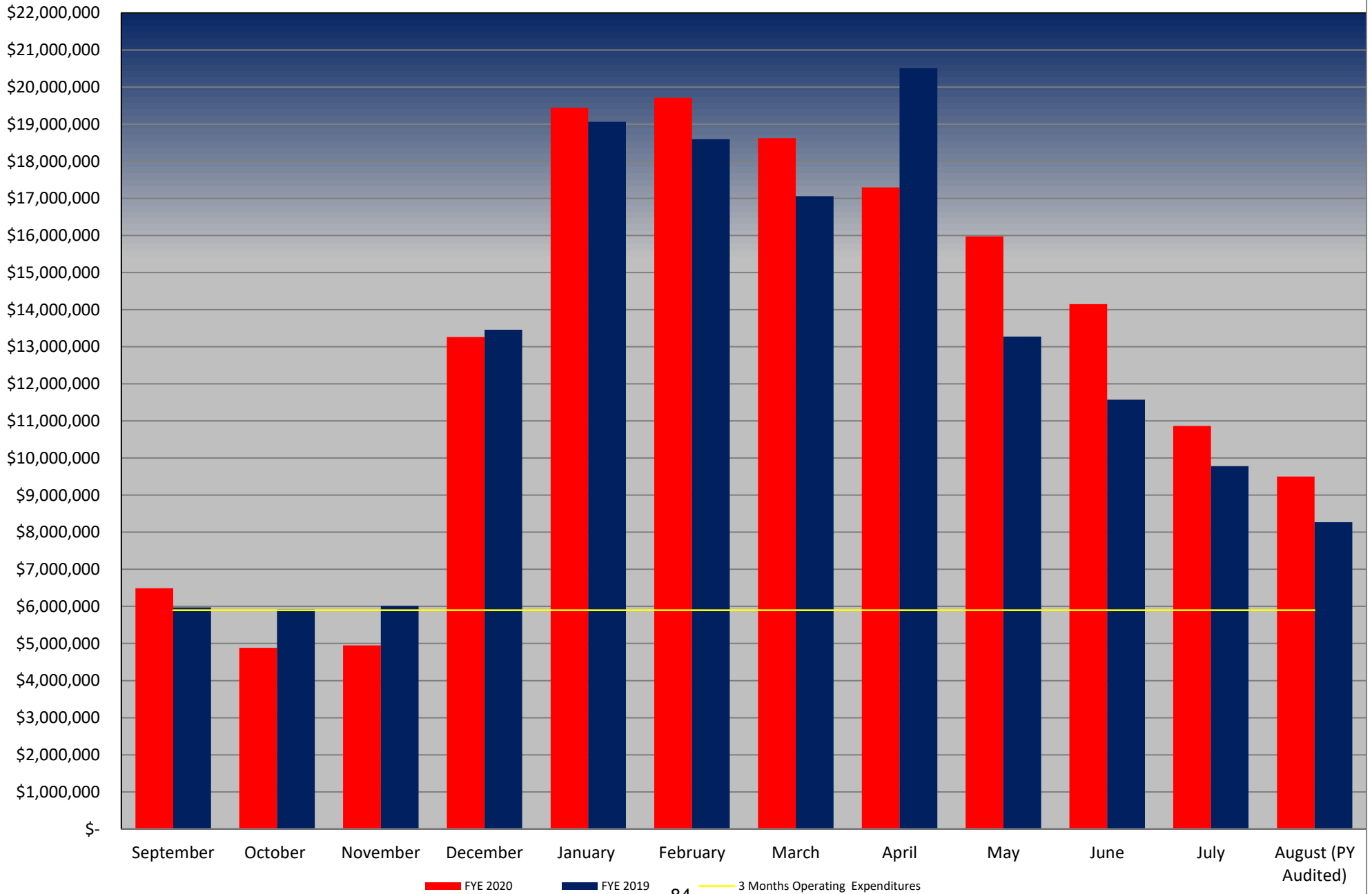
General Fund Revenues Collected to Date



General Fund Expenditures to Date



Fund Balance by Month



Wimberley Independent School District
Statement of Revenues, Expenditures, and Changes in Fund Balance
for the Month Ending August 31, 2020
(Un-Audited)

CHILD NUTRITION FUND							
	<u>Prior Year</u>				<u>Current Year</u>	<u>Unrealized/</u>	
	<u>Actual Revenues/</u>	<u>Original</u>	<u>Revised</u>		<u>Actual Revenues/</u>	<u>Unexpended</u>	<u>Percentage</u>
	<u>Expenditures</u>	<u>Budget</u>	<u>Budget</u>		<u>Expenditures</u>	<u>Budget</u>	<u>Y-T-D</u>
Revenues and Other Resources:							
Local	\$ 375,524.30	\$ 381,150	\$ 297,950	\$ 297,684.45	\$ (265.55)	99.91%	
State	3,901.10	4,000	4,000	3,951.31	(48.69)	98.78%	
Federal	439,375.19	420,000	382,050	383,175.03	1,125.03	100.29%	
Other sources	-	-	24,000	23,962.00	(38.00)	99.84%	
Total Revenues and Other Resources	\$ 818,800.59	\$ 805,150	\$ 708,000	\$ 708,772.79	\$ 772.79	100.11%	
Expenditures and Other Uses:							
35-6100 Payroll	349,352.02	420,568	443,863	\$ 440,923.48	2,939.52	99.34%	
35-6200 Professional and Contracted Services	3,560.05	16,150	8,834	\$ 6,957.05	1,876.95	78.75%	
35-6341 Food Supplies	268,403.54	293,991	317,627	\$ 304,200.83	13,426.17	95.77%	
35-6342 Non-Food Supplies	26,293.49	31,204	34,658	\$ 24,812.13	9,845.87	71.59%	
35-6344 USDA Commodities	55,635.94	50,000	45,700	\$ 45,697.45	2.55	99.99%	
35-6349 Miscellaneous Supplies	1,665.01	1,838	1,838	\$ 242.04	1,595.96	13.17%	
35-6300 Supplies & Materials	7,308.13	9,334	11,584	\$ 8,341.51	3,242.49	72.01%	
35-6400 Food Service Other Operating Expenses	23,944.37	20,954	20,594	\$ 16,896.92	3,697.08	82.05%	
35-6600 Food Service Capital Expenses	-	-	17,750	-	17,750.00	0.00%	
Total Expenditures	\$ 736,162.55	\$ 844,039	\$ 902,448	\$ 848,071.41	\$ 54,376.59	93.97%	
Excess of Revenues and Other Resources Over (Under) Expenditures	\$ 82,638.04	\$ (38,889)	\$ (194,448)	\$ (139,298.62)			
Audited Fund Balance September 1, 2019		303,040	303,040	303,040.00			
Fund Balance Ending - Monthly Reporting Period		\$ 264,151.00	\$ 108,592.00	\$ 163,741.38	\$ 55,149.38		

	<u>Prior Year/Mo.</u>	<u>Current Year/Mo.</u>	<u>Increase/(Decrease)</u>	<u>% Change</u>	<u>Prior Year/Day</u>	<u>Current Year/Day</u>	<u>Increase / (Decrease)</u>	<u>% Change</u>
School Breakfast Program Meals Served: (Days)					12	9		
Free-Bkfst	1,573	718	(855)	-54%	131	80	(51)	-39%
Reduced-Bkfst	125	34	(91)	-73%	10	4	(6)	-60%
Paid-Bkfst	277	118	(159)	-57%	23	13	(10)	-43%
Total	1,975	870	(1,105)	-56%	164	97	(67)	-41%
School Lunch Program Meals Served:								
Free-Lunch	5,160	1,165	(3,995)	-77%	430	129	(301)	-70%
Reduced-Lunch	612	113	(499)	-82%	51	13	(38)	-75%
Paid-Lunch	4,166	736	(3,430)	-82%	347	82	(265)	-76%
Total	9,938	2,014	(7,924)	-80%	828	224	(604)	-73%

	<u>Prior Year/Mo.</u>	<u>Current Year/Mo.</u>	<u>Increase/(Decrease)</u>	<u>% Change</u>
Number of Children approved for Free Meals	734	777	43	6%
Number of Children approved for Reduced Meals	9285	96	4	4%
Total	826	873	47	6%

Wimberley Independent School District
Statement of Revenues, Expenditures, and Changes in Fund Balance
for the Month Ending August 31, 2020
(Un-Audited)

DEBT SERVICE FUND

	<u>Prior Year</u> <u>Actual Revenues/</u> <u>Expenditures</u>		<u>Original</u> <u>Budget</u>		<u>Revised</u> <u>Budget</u>		<u>Current Year</u> <u>Actual Revenues/</u> <u>Expenditures</u>		<u>Unrealized/</u> <u>Unexpended</u> <u>Budget</u>	<u>Percentage</u> <u>Y-T-D</u>
Revenues:										
Local Revenue										
Taxes, Current Year Levy	5,468,383.53	\$	5,961,006	\$	6,068,000		6,051,520.09	\$	(16,479.91)	99.73%
Taxes, Prior Year	25,570.55		35,000		45,000		42,758.56		(2,241.44)	95.02%
Penalties, Interest and Other Tax Revenues	38,268.67		25,000		41,750		42,061.34	\$	311.34	100.75%
Earnings from Investments	94,630.99		55,000		58,000		55,728.93		(2,271.07)	96.08%
Miscellaneous Revenue	2,913.90		-		-		(1,735.86)		(1,735.86)	NA
Local Revenue	\$ 5,629,767.64	\$	6,076,006	\$	6,212,750	\$	6,190,333.06	\$	(22,416.94)	99.64%
State Revenue										
Additional State Aid for Homestead Exemption	\$ 78,573.00	\$	-	\$	71,000	\$	70,582.00		(418.00)	99.41%
State Revenue	\$ 78,573.00	\$	-	\$	71,000	\$	70,582.00	\$	(418)	99.41%
Other Sources										
Issuance of Bonds	\$ -	\$	-	\$	24,528,650	\$	24,528,649.00		(1.00)	100.00%
Operating Transfer In	\$ -	\$	-	\$	4,900	\$	4,888.31		(11.69)	99.76%
Bond Premium/Discount	\$ -	\$	-	\$	7,016,905	\$	7,016,903.60		(1.40)	100.00%
Other Source Revenue	\$ -	\$	-	\$	31,550,455	\$	31,550,440.91	\$	(14)	299.76%
Total Revenue	\$ 5,708,340.64	\$	6,076,006.00	\$	37,834,205.00	\$	37,811,355.97	\$	(22,849.03)	99.94%
Expenditures:										
71-6511 Bond Principal	615,194.05		1,004,790		1,925,000		1,925,000.00		(920,210.00)	100.00%
71-6521 Interest on Bonds	4,705,235.12		4,662,265		4,089,790		3,736,858.20		925,406.80	91.37%
71-6599 Other Debt Service Fees	5,014.23		10,500		371,891		372,140.90		(361,640.90)	100.07%
00-8949 Other Uses Non-Op Expenses	-		-		31,178,141		31,178,140.87		(31,178,140.87)	100.00%
Total Expenditures	\$ 5,325,443.40	\$	5,677,555	\$	37,564,822	\$	37,212,139.97	\$	(31,534,585)	99.06%
Excess of Revenues										
Over (Under) Expenditures	\$ 382,897.24	\$	398,451	\$	269,383	\$	599,216.00			
Audited Fund Balance September 1, 2019		\$	1,784,245.00	\$	1,784,245.00	\$	1,784,245.00			
Fund Balance Ending - Monthly Reporting Period		\$	2,182,696.00	\$	2,053,628.00	\$	2,383,461.00	\$	329,833.00	

Wimberley Independent School District
Statement of Revenues, Expenses, and Changes in Equity
for the Month Ending August 31, 2020
(Un-Audited)

	CAPITAL PROJECT FUNDS	
	<u>2018</u>	<u>2019 - 2020</u>
	<u>Capital Projects</u>	<u>Capital Projects</u>
	<u>Program</u>	<u>Total Revenues/</u>
	<u>\$45,500,000</u>	<u>Expenses</u>
<i>Revenues and Other Resources:</i>		
Local	\$ 596,466.88	\$ 596,466.88
State	-	-
Other sources	211,822.23	211,822.23
Total Revenues and Other Resources	\$ 808,289.11	\$ 808,289.11
<i>Expenses and Other Uses:</i>		
6100 Payroll	-	-
6200 Professional and Contracted Services	-	-
6300 Supplies and Materials	1,189,359.44	1,189,359.44
6400 Other Operating Expenses	-	-
6600 Capital Outlay	27,289,570.33	27,289,570.33
8000-Other Uses	-	-
Total Expenses	\$ 28,478,929.77	\$ 28,478,929.77
Excess of Revenues and Other Resources		
Over (Under) Expenses	\$ (27,670,640.66)	\$ (27,670,640.66)
Audited Fund Equity September 1, 2019	\$ 31,887,349.00	\$ 31,887,349.00
Fund Balance Ending - Monthly Reporting Period	\$ 4,216,708.34	\$ 4,216,708.34

Wimberley Independent School District
Statement of Revenues, Expenditures, and Changes in Fund Balance
for the Month Ending August 31, 2020
(Un-Audited)

SPECIAL REVENUE FUNDS

	<u>Prior Year</u> <u>Actual Revenues/</u> <u>Expenditures</u>	<u>Revised Budget</u>	<u>Current Year</u> <u>Actual Revenues/</u> <u>Expenditures</u>	<u>Unrealized/</u> <u>Unexpended</u> <u>Budget</u>	<u>Percentage</u> <u>Y-T-D</u>
Revenues:					
Local	\$ 23,327.96	\$ 38,438	\$ 30,595.08	\$ (7,842.92)	79.60%
State	367,091.63	621,315	589,643.49	(31,671.51)	94.90%
Federal	-	980,936	723,427.97	(257,508.03)	73.75%
Total Revenues	\$ 390,419.59	\$ 1,640,689	\$ 1,343,666.54	\$ (297,022.46)	81.90%
Expenditures:					
11-Instruction	457,987.07	1,170,373	1,112,144.34	58,228.66	95.02%
12-Library	-	83	(27.98)	110.98	-33.71%
13-Prof Dev	375.00	59,035	58,925.00	110.00	99.81%
21-Instruct Admin	-	-	812.07	(812.07)	NA
31-Counselors	-	151,239	92,158.13	59,080.87	60.94%
33-Health Services	-	-	541.93	(541.93)	NA
34-Transportation	-	52,082	52,082.00	-	100.00%
36-Co-Curricular	-	14,050	29,931.25	(15,881.25)	213.03%
41-Gen Admin	-	10,000	14,679.60	(4,679.60)	146.80%
51-Maintenance	-	112,078	7,035.79	105,042.21	6.28%
52-Security	-	40,469	66,737.48	(26,268.48)	164.91%
53-Data Services	-	-	40,468.00	(40,468.00)	NA
61-Community Service	-	-	1,503.36	(1,503.36)	NA
Total Expenditures	\$ 458,362.07	\$ 1,609,409	\$ 1,476,990.97	\$ 132,418.03	91.77%
Excess of Revenues					
Over (Under) Expenditures	\$ (67,942.48)	\$ 31,280.00	\$ (133,324.43)		
Audited Fund Balance September 1, 2019		\$ -	\$ -	\$ -	
Fund Balance Ending - Monthly Reporting Period		\$ 31,280.00	\$ (133,324.43)	\$ (164,604.43)	

Wimberley Independent School District
Statement of Revenues, Expenses, and Changes in Equity
for the Month Ending August 31, 2020
(Un-Audited)

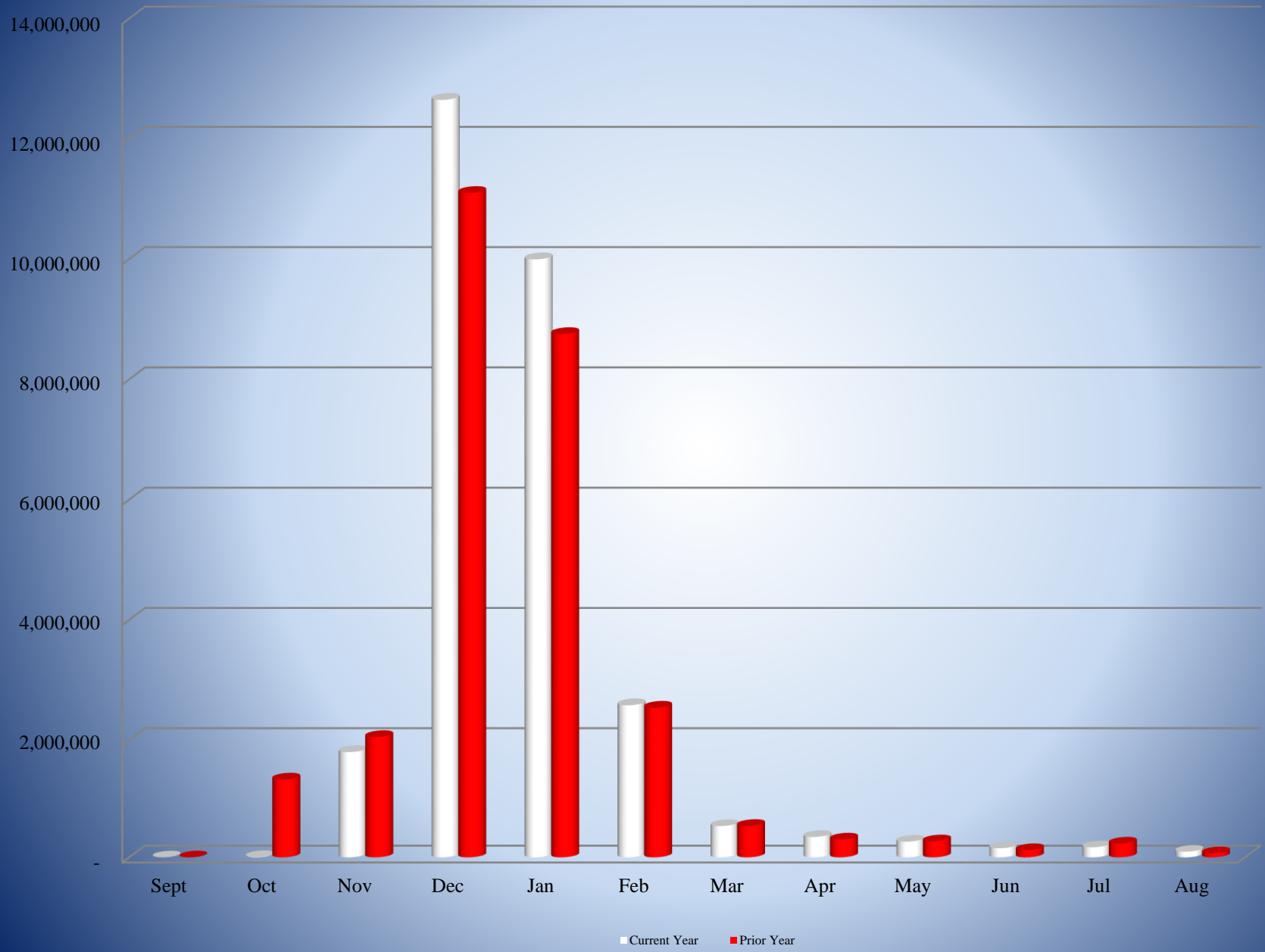
ENTERPRISING FUNDS

	<u>2019-2020</u> <u>Scudder</u> <u>After School</u> <u>Program</u>	<u>2019-2020</u> <u>Jacob's Well</u> <u>After School</u> <u>Program</u>	<u>2019-2020</u> <u>Scudder</u> <u>Pre-K</u> <u>Program</u>	<u>2019-2020</u> <u>Total Revenues/</u> <u>Expenses</u>
<i>Revenues and Other Resources:</i>				
Local	\$ 59,810.25	\$ 86,859.30	\$ 234,865.66	\$ 381,535.21
State	3,393.01	2,399.80	12,139.72	17,932.53
Other sources	-	-	-	-
Total Revenues and Other Resources	\$ 63,203.26	\$ 89,259.10	\$ 247,005.38	\$ 399,467.74
<i>Expenses and Other Uses:</i>				
6100 Payroll	52,422.45	36,783.28	194,354.07	283,559.80
6200 Professional and Contracted Services	-	572.93	-	572.93
6300 Supplies and Materials	1,230.00	12,452.40	25.00	13,707.40
6400 Other Operating Expenses	-	1,385.10	-	1,385.10
6600 Capital Outlay	-	-	-	-
8000-Other Uses	6,995.31	26,679.42	47,263.12	80,937.85
Total Expenses	\$ 60,647.76	\$ 77,873.13	\$ 241,642.19	\$ 380,163.08
Excess of Revenues and Other Resources Over (Under) Expenses	\$ 2,555.50	\$ 11,385.97	\$ 5,363.19	\$ 19,304.66
Audited Fund Equity September 1, 2019	\$ 17,797.00	\$ 54,069.00	\$ 36,793.00	\$ 108,659.00
Fund Balance Ending - Monthly Reporting Period	\$ 20,352.50	\$ 65,454.97	\$ 42,156.19	\$ 127,963.66

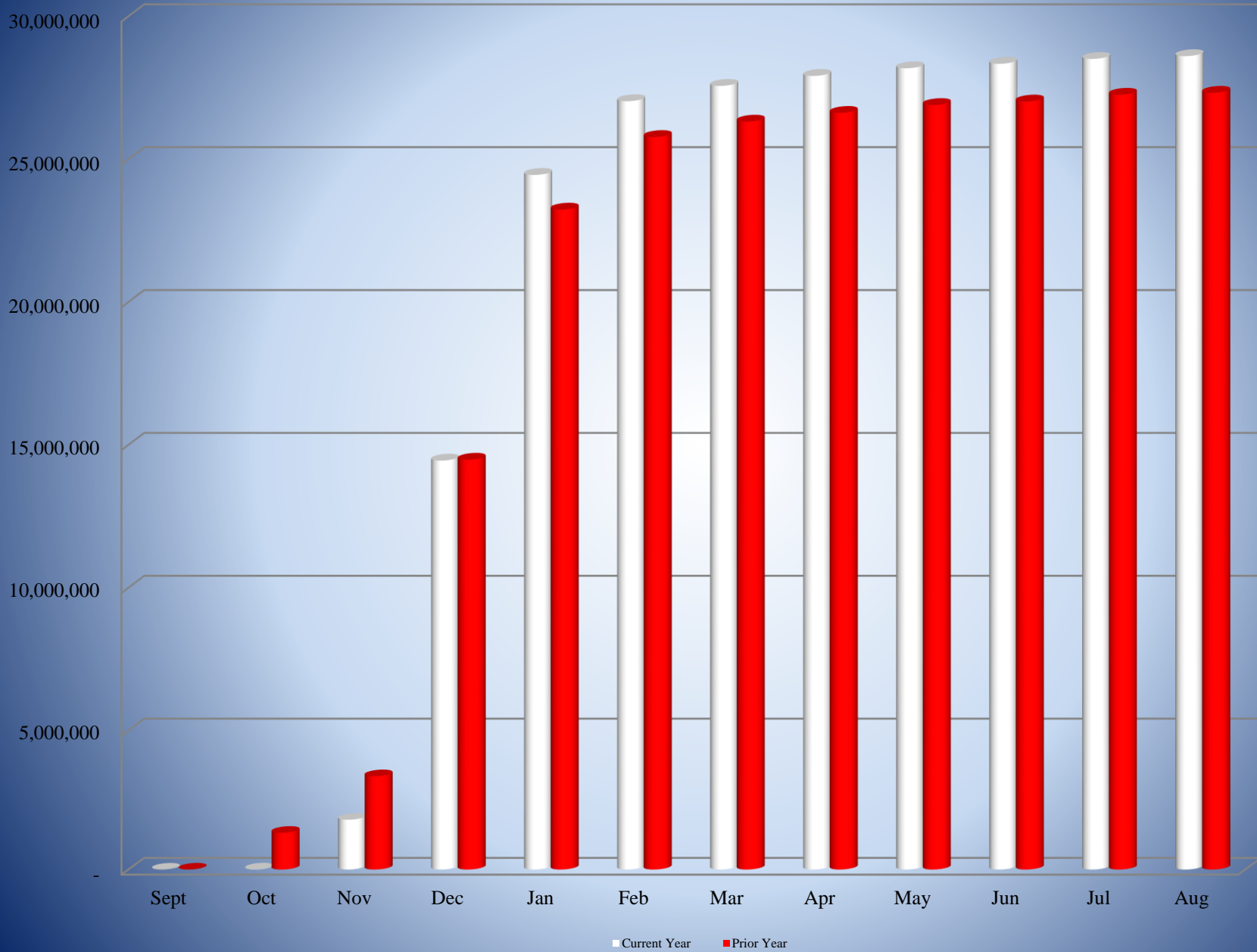
Wimberley Independent School District
Monthly Tax Collection Report
for the Month Ending August 31, 2020

	Prior Year 2018 - 2019				Current Year 2019 - 2020			
	General Fund	Debt Service Fund	Total	% of Levy	General Fund	Debt Service Fund	Total	% of Levy
Current Month Tax Collections:								
5711 Taxes-Current Year Tax Levy	\$ 55,385.83	\$ 13,856.65	\$ 69,242.48	0.25%	\$ 76,383.97	\$ 20,491.93	\$ 96,875.90	0.34%
5712 Taxes-Delinquent Collections	\$ (2,103.95)	\$ (420.23)	\$ (2,524.18)		\$ (1,842.85)	\$ (484.31)	\$ (2,327.16)	
5719 Penalties and Interest	\$ 10,640.95	\$ 2,515.85	\$ 13,156.80		\$ 9,276.68	\$ 2,440.28	\$ 11,716.96	
Total Current Month Collections	\$ 63,922.83	\$ 15,952.27	\$ 79,875.10		\$ 83,817.80	\$ 22,447.90	\$ 106,265.70	
Fiscal Year to Date Collections:								
5711 Taxes-Current Year Tax Levy	\$ 21,857,459.12	\$ 5,468,383.53	\$ 27,325,842.65	98.71%	\$ 22,557,424.60	\$ 6,051,557.28	\$ 28,608,981.88	99.49%
5712 Taxes-Delinquent Collections	\$ 136,183.62	\$ 25,570.55	\$ 161,754.17		\$ 193,275.82	\$ 42,758.56	\$ 236,034.38	
5719 Penalties and Interest	\$ 176,438.69	\$ 38,850.20	\$ 215,288.89		\$ 174,483.48	\$ 42,067.64	\$ 216,551.12	
Total Revenue Collected	\$ 22,170,081.43	\$ 5,532,804.28	\$ 27,702,885.71		22,925,183.90	6,136,383.48	29,061,567.38	
Total Revised Budgeted Tax Revenue (Current, Delinquent, Penalty & Interest)	\$ 22,114,000.00	\$ 5,515,700.00	\$ 27,629,700.00		\$ 22,490,620.00	\$ 6,021,006.00	\$ 28,511,626.00	
Percentage of Budget Collected	100.25%	100.31%	100.26%		101.93%	101.92%	101.93%	

Month to Date Tax Collections Current Levy



Year to Date Tax Collections Current Levy

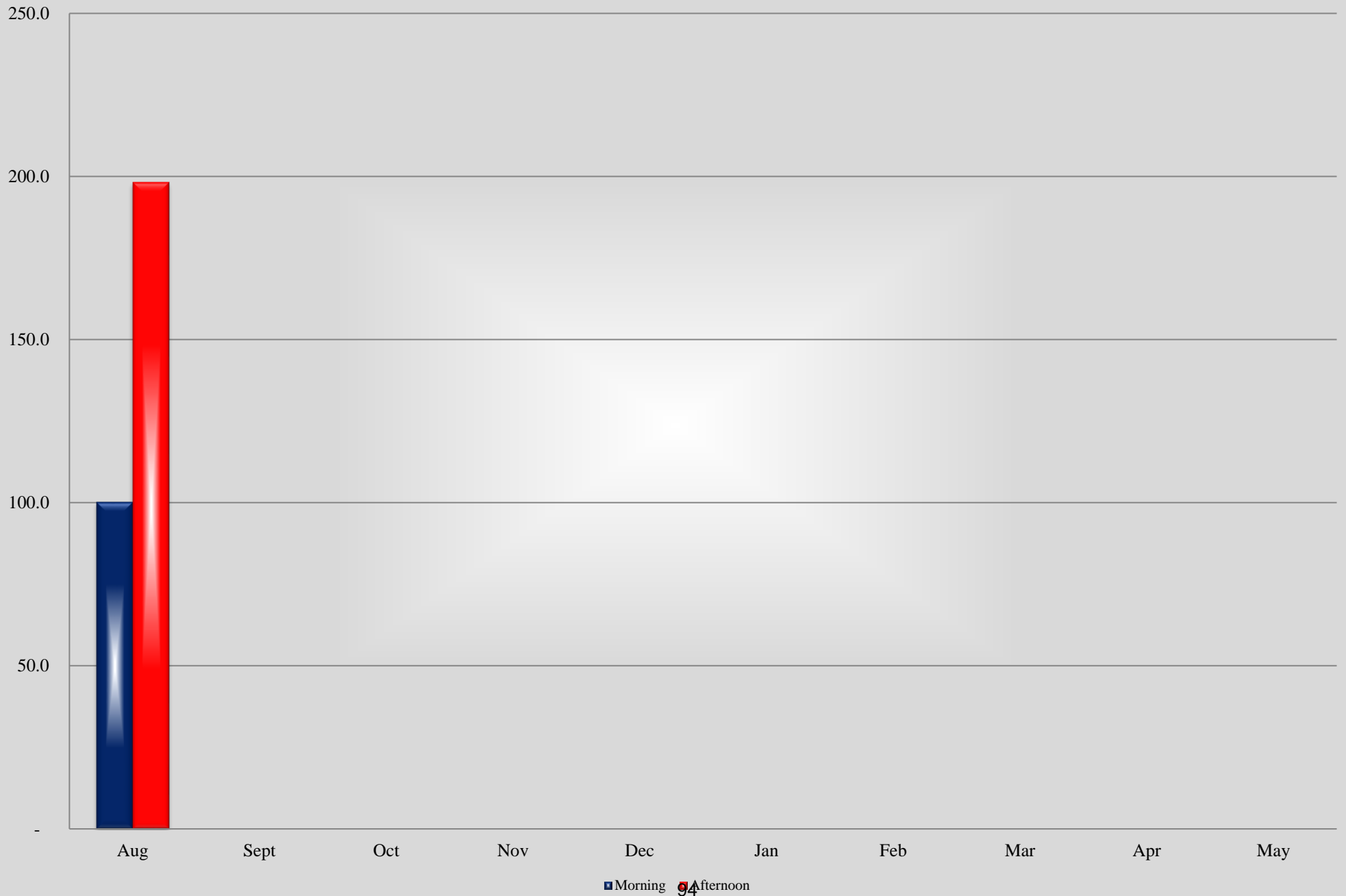


Wimberley Independent School District
Summary of Transportation - Student Riders
for the Month Ending August 31, 2020

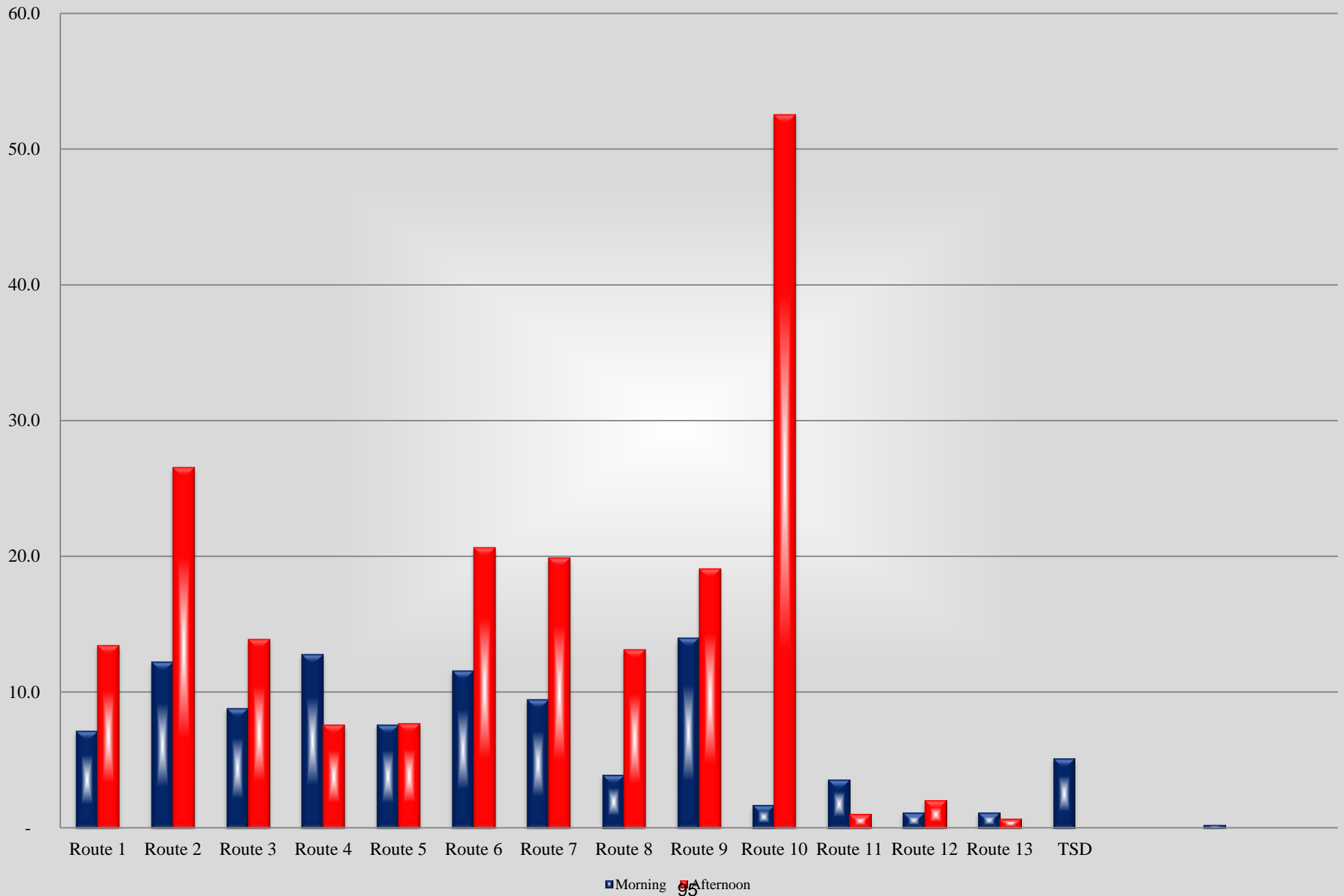
	Days: 9											9	<u>Average</u>	<u>Daily</u>	<u>Annual</u>
<u>Morning:</u>	<u>Aug</u>	<u>Sept</u>	<u>Oct</u>	<u>Nov</u>	<u>Dec</u>	<u>Jan</u>	<u>Feb</u>	<u>Mar</u>	<u>Apr</u>	<u>May</u>	<u>Total</u>	<u>Ridership</u>	<u>Mileage</u>	<u>Mileage</u>	
Route 1	64.0										64.0	7.1	43.57	392.13	
Route 2	110.0										110.0	12.2	34.27	308.43	
Route 3	79.0										79.0	8.8	41.32	371.88	
Route 4	115.0										115.0	12.8	32.21	289.89	
Route 5	68.0										68.0	7.6	31.34	282.06	
Route 6	104.0										104.0	11.6	30.91	278.19	
Route 7	85.0										85.0	9.4	35.94	323.46	
Route 8	35.0										35.0	3.9	23.26	209.34	
Route 9	126.0										126.0	14.0	24.60	221.40	
Route 11	15.0										15.0	1.7	16.83	151.47	
Route 12	32.0										32.0	3.6	30.38	273.42	
Route 13	10.0										10.0	1.1	55.80	502.20	
Route 14	10.0										10.0	1.1	33.55	301.95	
Route 15	46.0										46.0	5.1	38.24	344.16	
Route 16	-										-	-	0.00	0.00	
Route 17	2.0										2.0	0.2	19.26	173.34	
TSD	-										-	-	0.00	0.00	
Total	901.0	-	-	-	-	-	-	-	-	-	901.0	100.1	491.48	4423.32	
Average number of students	100.1	-	-	-	-	-	-	-	-	-	100.1				

													<u>Average</u>	<u>Daily</u>	<u>Annual</u>
<u>Afternoon:</u>	<u>August</u>	<u>September</u>	<u>October</u>	<u>November</u>	<u>December</u>	<u>January</u>	<u>February</u>	<u>March</u>	<u>April</u>	<u>May</u>	<u>Total</u>	<u>Ridership</u>	<u>Mileage</u>	<u>Mileage</u>	
Route 1	121.0										121.0	13.4	45.23	407.07	
Route 2	239.0										239.0	26.6	35.50	319.50	
Route 3	125.0										125.0	13.9	47.21	424.89	
Route 4	68.0										68.0	7.6	36.04	324.36	
Route 5	69.0										69.0	7.7	37.31	335.79	
Route 6	186.0										186.0	20.7	30.77	276.93	
Route 7	179.0										179.0	19.9	36.75	330.75	
Route 8	118.0										118.0	13.1	29.26	263.34	
Route 9	172.0										172.0	19.1	30.75	276.75	
Route 10	473.0										473.0	52.6	22.27		
Route 11	9.0										9.0	1.0	26.21	235.89	
Route 12	18.0										18.0	2.0	36.79	331.11	
Route 13	6.0										6.0	0.7	55.67	501.03	
TSD	-										-	-	0.00	0.00	
Total	1,783.0	-	-	-	-	-	-	-	-	-	1,783.0	198.1	469.76	4027.41	
Average number of students	198.1	-	-	-	-	-	-	-	-	-	198.1				
Average daily mileage															961.24
															93

Total Average Number of Students



Average Ridership by Routes



Wimberley Independent School District

Quarterly Investment Portfolio Report

Month Ending August 31, 2020

Portfolio Investments Summary

4th Quarter Ending August 31, 2020

Your Portfolio:

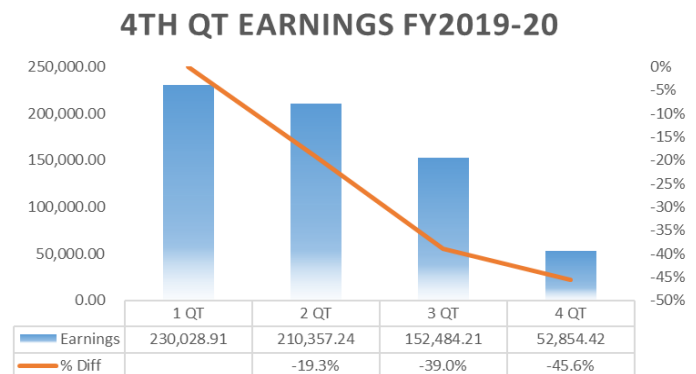
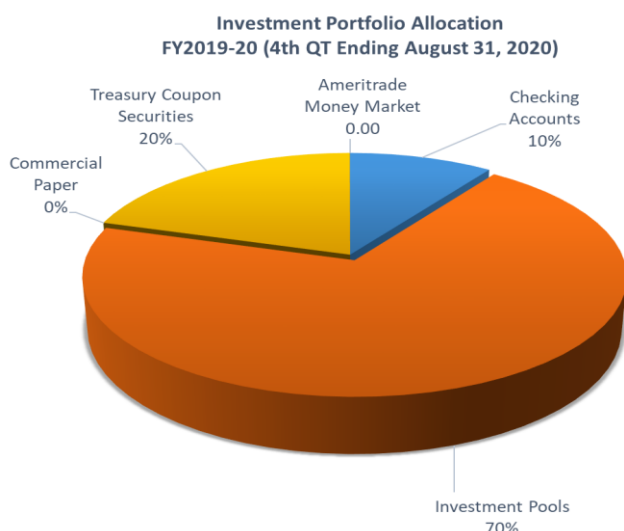
Among the many uncertainties associated with the current pandemic the ability of the economy to recover ranks highly. The interruption of economic growth has been unprecedented and the snapback unexpectedly strong with the Fed's continuing to support the economic recovery through a variety of stimulus and low interest rate programs. What remains unclear is whether sufficient support can be maintained until there is a vaccine that can eradicate or, at least, contain the spread of the corona virus.

The 4th QT of FY2019-20 reflected a sharp rebound in the economy after a continued pattern of decline in the 2nd and 3rd quarter of 2020. The district's portfolio earned \$52,854 at an average rate of return of 0.69% with an average daily balance of \$30,456,745 during the ended 4th QT. We decreased our pool investment activity by 7% and increase our Treasuries by 6% as pool rates declined to 0.3%. Total earnings during the fiscal year were \$645,724 at an average yield of 1.436 (0.20 basis points below the T-Bill).

Key Headlines:

- Federal Reserve promises to maintain short term rates at or nearly zero in efforts to subdue inflation as prices rise due to consumer demand.
- The unemployment rate dropped by 1.8% from 10.2% back in July to 8.4% as people return to their jobs and businesses reopen.
- The price of oil ends at \$37 per barrel after a sharp decline to nearly zero in the previous quarter due to the country being in locked down to prevent infections from spreading.

The graphs below show WISD's asset allocations by market sector. Our portfolio continues to benefit from the yields locked in prior to the dramatic change in the economic environment and subsequent decrease in short term interest rates. Given that investment pool rates continue to decline we see opportunities in the 6 to 24-month maturities. With the Fed's promising to maintain short term rates near zero through 2022 to potentially target high levels of inflation, we do not see the investment outlook changing significantly in the near term.





**Wimberley ISD
Portfolio Management
Portfolio Summary
August 31, 2020**

TCG Advisors, LP
900 S Capital of Texas Hwy
350
Austin, TX 78746
(512)600-5200

Investments	Par Value	Market Value	Book Value	% of Portfolio	Term	Days to Maturity	YTM 365 Equiv.
Checking Accounts	1,964,070.08	1,964,070.08	1,964,070.08	9.81	1	1	0.000
Treasury Coupon Securities	4,070,000.00	4,078,305.02	4,073,023.74	20.35	298	31	1.638
Investment Pools	13,972,229.16	13,972,229.16	13,972,229.16	69.82	1	1	0.383
Money Markets	3,819.14	3,819.14	3,819.14	0.02	1	1	0.015
	20,010,118.38	20,018,423.40	20,013,142.12	100.00%	61	7	0.600
Investments							
Cash and Accrued Interest							
Accrued Interest at Purchase		0.00	0.00				
Ending Accrued Interest		43,531.36	43,531.36				
Subtotal		43,531.36	43,531.36				
Total Cash and Investments Value	20,010,118.38	20,061,954.76	20,056,673.48		61	7	0.600

Total Earnings	August 31 Period Ending	Fiscal Year Ending
Current Year	52,854.42	645,724.78
Average Daily Balance	30,456,745.37	
Effective Rate of Return	0.69%	

Moises Santiago, Chief Financial Officer



**Wimberley ISD
Fund ACT - Activity
Investments by Fund
August 31, 2020**

TCG Advisors, LP
900 S Capital of Texas Hwy
350
Austin, TX 78746
(512)600-5200

CUSIP	Investment #	Issuer	Purchase Date	Book Value	Par Value	Market Value	Current Rate	YTM 360	YTM 365	Maturity Days To Date Maturity
Checking Accounts										
1112	10400	Wells Fargo Bank	01/01/2019	262,313.35	262,313.35	262,313.35				1
Subtotal and Average				262,313.35	262,313.35	262,313.35		0.000	0.000	1
Investment Pools										
SYS10417	10441	LoneStar	03/06/2020	291,467.12	291,467.12	291,467.12	0.280	0.276	0.280	1
Subtotal and Average				291,467.12	291,467.12	291,467.12		0.276	0.280	1
Total Investments and Average				553,780.47	553,780.47	553,780.47		0.145	0.147	1

**Fund ACTPYB - Accounts Payable
Investments by Fund
August 31, 2020**

CUSIP	Investment #	Issuer	Purchase Date	Book Value	Par Value	Market Value	Current Rate	YTM 360	YTM 365	Maturity Days To Date Maturity
Checking Accounts										
1112	10414	Wells Fargo Bank	01/01/2019	73,938.17	73,938.17	73,938.17				1
Subtotal and Average				73,938.17	73,938.17	73,938.17		0.000	0.000	1
Total Investments and Average				73,938.17	73,938.17	73,938.17		0.000	0.000	1

**Fund BOND - Bond Fund
Investments by Fund
August 31, 2020**

CUSIP	Investment #	Issuer	Purchase Date	Book Value	Par Value	Market Value	Current Rate	YTM 360	YTM 365	Maturity Date	Days To Maturity
Treasury Coupon Securities											
912828L65	10434	U.S. Treasury	07/22/2019	229,905.45	230,000.00	230,230.39	1.375	1.884	1.910	09/30/2020	29
912828L65	10435	U.S. Treasury	10/17/2019	244,953.57	245,000.00	245,245.42	1.375	1.605	1.627	09/30/2020	29
9128285B2	10436	U.S. Treasury	12/20/2019	3,503,090.95	3,500,000.00	3,507,317.10	2.750	1.600	1.623	09/30/2020	29
912828N48	10437	U.S. Treasury	02/14/2020	95,073.77	95,000.00	95,512.11	1.750	1.520	1.542	12/31/2020	121
Subtotal and Average				4,073,023.74	4,070,000.00	4,078,305.02		1.615	1.638		31
Money Markets											
TD MM	10431	TD Ameritrade Money Market	01/01/2019	3,819.14	3,819.14	3,819.14	0.015	0.014	0.014		1
Subtotal and Average				3,819.14	3,819.14	3,819.14		0.014	0.015		1
Total Investments and Average				4,076,842.88	4,073,819.14	4,082,124.16		1.614	1.636		31

**Fund CP - Capital Projects
Investments by Fund
August 31, 2020**

CUSIP	Investment #	Issuer	Purchase Date	Book Value	Par Value	Market Value	Current Rate	YTM 360	YTM 365	Maturity Days To Date Maturity
Checking Accounts										
1112	10411	Wells Fargo Bank	01/01/2019	205,587.16	205,587.16	205,587.16				1
Subtotal and Average				205,587.16	205,587.16	205,587.16		0.000	0.000	1
Total Investments and Average				205,587.16	205,587.16	205,587.16		0.000	0.000	1

Fund CP2016 - Capital Projects 2016
Investments by Fund
August 31, 2020

CUSIP	Investment #	Issuer	Purchase Date	Book Value	Par Value	Market Value	Current Rate	YTM 360	YTM 365	Maturity Days To Date Maturity
Investment Pools										
SYS10417	10417	LoneStar	01/01/2019	0.00	0.00	0.00	1.760	1.735	1.760	1
Subtotal and Average				0.00	0.00	0.00	0.000	0.000	0.000	0
Total Investments and Average				0.00	0.00	0.00	0.000	0.000	0.000	0

Fund CP2018 - Capital Projects 2018
Investments by Fund
August 31, 2020

CUSIP	Investment #	Issuer	Purchase Date	Book Value	Par Value	Market Value	Current Rate	YTM 360	YTM 365	Maturity Days To Date Maturity
Investment Pools										
SYS10417	10418	LoneStar	01/01/2019	1,414,829.94	1,414,829.94	1,414,829.94	0.280	0.276	0.280	1
Subtotal and Average				1,414,829.94	1,414,829.94	1,414,829.94		0.276	0.280	1
Total Investments and Average				1,414,829.94	1,414,829.94	1,414,829.94		0.276	0.280	1

**Fund GEN - General
Investments by Fund
August 31, 2020**

CUSIP	Investment #	Issuer	Purchase Date	Book Value	Par Value	Market Value	Current Rate	YTM 360	YTM 365	Maturity Days To Date Maturity
Checking Accounts										
1112	10413	Wells Fargo Bank	01/01/2019	704,774.28	704,774.28	704,774.28				1
Subtotal and Average				704,774.28	704,774.28	704,774.28		0.000	0.000	1
Investment Pools										
SYS10417	10432	LoneStar	01/01/2019	10,236,464.38	10,236,464.38	10,236,464.38	0.420	0.414	0.420	1
Subtotal and Average				10,236,464.38	10,236,464.38	10,236,464.38		0.414	0.420	1
Total Investments and Average				10,941,238.66	10,941,238.66	10,941,238.66		0.388	0.393	1

**Fund IS - Interest and Sinking
Investments by Fund
August 31, 2020**

CUSIP	Investment #	Issuer	Purchase Date	Book Value	Par Value	Market Value	Current Rate	YTM 360	YTM 365	Maturity Days To Date Maturity
Checking Accounts										
1112	10412	Wells Fargo Bank	01/01/2019	353,260.78	353,260.78	353,260.78				1
Subtotal and Average				353,260.78	353,260.78	353,260.78		0.000	0.000	1
Investment Pools										
SYS10417	10433	LoneStar	01/01/2019	2,029,467.72	2,029,467.72	2,029,467.72	0.280	0.276	0.280	1
Subtotal and Average				2,029,467.72	2,029,467.72	2,029,467.72		0.276	0.280	1
Total Investments and Average				2,382,728.50	2,382,728.50	2,382,728.50		0.235	0.238	1

**Fund PYRLL - Payroll
Investments by Fund
August 31, 2020**

CUSIP	Investment #	Issuer	Purchase Date	Book Value	Par Value	Market Value	Current Rate	YTM 360	YTM 365	Maturity Days To Date Maturity
Checking Accounts										
1112	10415	Wells Fargo Bank	01/01/2019	364,196.34	364,196.34	364,196.34				1
Subtotal and Average				364,196.34	364,196.34	364,196.34		0.000	0.000	1
Total Investments and Average				364,196.34	364,196.34	364,196.34		0.000	0.000	1



**Wimberley ISD
Summary by Type
August 31, 2020
Grouped by Fund**

TCG Advisors, LP
900 S Capital of Texas Hwy
350
Austin, TX 78746
(512)600-5200

Security Type	Number of Investments	Par Value	Book Value	% of Portfolio	Average YTM 365	Average Days to Maturity
Fund: Activity						
Investment Pools	1	291,467.12	291,467.12	1.46	0.280	1
Checking Accounts	1	262,313.35	262,313.35	1.31	0.000	1
Subtotal	2	553,780.47	553,780.47	2.77	0.147	1
Fund: Accounts Payable						
Checking Accounts	1	73,938.17	73,938.17	0.37	0.000	1
Subtotal	1	73,938.17	73,938.17	0.37	0.000	1
Fund: Bond Fund						
Money Markets	1	3,819.14	3,819.14	0.02	0.015	1
Treasury Coupon Securities	4	4,070,000.00	4,073,023.74	20.35	1.638	31
Subtotal	5	4,073,819.14	4,076,842.88	20.37	1.636	31
Fund: Capital Projects						
Checking Accounts	1	205,587.16	205,587.16	1.03	0.000	1
Subtotal	1	205,587.16	205,587.16	1.03	0.000	1
Fund: Capital Projects 2016						
Investment Pools	1	0.00	0.00	0.00	0.000	0
Subtotal	1	0.00	0.00	0.00	0.000	0
Fund: Capital Projects 2018						
Investment Pools	1	1,414,829.94	1,414,829.94	7.07	0.280	1
Subtotal	1	1,414,829.94	1,414,829.94	7.07	0.280	1
Fund: General						
Investment Pools	1	10,236,464.38	10,236,464.38	51.15	0.420	1
Checking Accounts	1	704,774.28	704,774.28	3.52	0.000	1
Subtotal	2	10,941,238.66	10,941,238.66	54.67	0.393	1
Fund: Interest and Sinking						
Investment Pools	1	2,029,467.72	2,029,467.72	10.14	0.280	1

Wimberley ISD
Summary by Type
August 31, 2020
Grouped by Fund

Security Type	Number of Investments	Par Value	Book Value	% of Portfolio	Average YTM 365	Average Days to Maturity
Fund: Interest and Sinking						
Checking Accounts	1	353,260.78	353,260.78	1.77	0.000	1
Subtotal	2	2,382,728.50	2,382,728.50	11.91	0.238	1
Fund: Payroll						
Checking Accounts	1	364,196.34	364,196.34	1.82	0.000	1
Subtotal	1	364,196.34	364,196.34	1.82	0.000	1
Total and Average	16	20,010,118.38	20,013,142.12	100.00	0.600	7



Wimberley ISD
Cash Reconciliation Report
For the Period June 1, 2020 - August 31, 2020
Grouped by Fund

TCG Advisors, LP
 900 S Capital of Texas Hwy
 350
 Austin, TX 78746
 (512)600-5200

Trans. Date	Investment #	Fund	Trans. Type	Security ID	Par Value	Security Description	Maturity Date	Purchases	Interest	Redemptions	Cash
Bond Fund											
06/30/2020	10437	BOND	Interest	912828N48	95,000.00	USTR 0.1M 1.75% Mat. 12/31/2020	12/31/2020	0.00	831.25	0.00	831.25
07/15/2020	10422	BOND	Interest	9128282J8	1,500,000.00	USTR 1.5M 1.50% Mat. 07/15/2020	07/15/2020	0.00	11,250.00	0.00	11,250.00
07/15/2020	10422	BOND	Maturity	9128282J8	1,500,000.00	USTR 1.5M 1.50% Mat. 07/15/2020	07/15/2020	0.00	0.00	1,500,000.00	1,500,000.00
08/07/2020	10443	BOND	Maturity	07274LH75	1,815,000.00	BAY 1.8M 1.30% Mat. 08/07/2020	08/07/2020	0.00	0.00	1,815,000.00	1,815,000.00
Subtotal								0.00	12,081.25	3,315,000.00	3,327,081.25
Total								0.00	12,081.25	3,315,000.00	3,327,081.25



**Wimberley ISD
Maturity Report
Sorted by Maturity Date
Amounts due during June 1, 2020 - August 31, 2020**

TCG Advisors, LP
900 S Capital of Texas Hwy
350
Austin, TX 78746
(512)600-5200

CUSIP	Investment #	Fund	Sec. Type	Issuer	Par Value	Maturity Date	Purchase Date	Rate at Maturity	Book Value at Maturity	Interest	Maturity Proceeds	Net Income
9128282J8	10422	BOND	TRC	USTR	1,500,000.00	07/15/2020	01/18/2019	1.500	1,500,000.00	11,250.00	1,511,250.00	11,250.00
07274LH75	10443	BOND	ACP	BAY	1,815,000.00	08/07/2020	04/07/2020	1.300	1,815,000.00	0.00	1,815,000.00	0.00
Total Maturities					3,315,000.00				3,315,000.00	11,250.00	3,326,250.00	11,250.00



Wimberley ISD
Interest Earnings
Sorted by Fund - Maturity Date
June 1, 2020 - August 31, 2020
Yield on Beginning Book Value

TCG Advisors, LP
 900 S Capital of Texas Hwy
 350
 Austin, TX 78746
 (512)600-5200

CUSIP	Investment #	Fund	Issuer	Ending Par Value	Beginning Book Value	Ending Book Value	Maturity Date	Current Rate	Adjusted Interest Earnings			
									Annualized Yield	Interest Earned	Amortization/ Accretion	Adjusted Interest Earnings
Fund: Activity												
SYS10417	10441	ACT	LNSTR	291,467.12	398,923.69	291,467.12		0.280	0.416	418.43	0.00	418.43
1112	10400	ACT	WF	262,313.35	178,709.73	262,313.35				0.00	0.00	0.00
			Subtotal	553,780.47	577,633.42	553,780.47			0.287	418.43	0.00	418.43
Fund: Accounts Payable												
1112	10414	ACTPYB	WF	73,938.17	115,524.11	73,938.17				0.00	0.00	0.00
			Subtotal	73,938.17	115,524.11	73,938.17				0.00	0.00	0.00
Fund: Bond Fund												
TD MM	10431	BOND	TDMM	3,819.14	30,736.44	3,819.14		0.015	0.006	0.45	0.00	0.45
912828J8	10422	BOND	USTR	0.00	1,498,077.91	0.00	07/15/2020	1.500	2.570	2,719.78	1,922.09	4,641.87
07274LH75	10443	BOND	BAY	0.00	1,810,622.44	0.00	08/07/2020	1.300	1.317	0.00	4,377.56	4,377.56
912828L65	10435	BOND	USTR	245,000.00	244,806.26	244,953.57	09/30/2020	1.375	1.611	846.79	147.31	994.10
912828L65	10434	BOND	USTR	230,000.00	229,605.51	229,905.45	09/30/2020	1.375	1.892	794.95	299.94	1,094.89
9128285B2	10436	BOND	USTR	3,500,000.00	3,512,896.71	3,503,090.95	09/30/2020	2.750	1.625	24,193.99	-9,805.76	14,388.23
912828N48	10437	BOND	USTR	95,000.00	95,129.86	95,073.77	12/31/2020	1.750	1.505	417.06	-56.09	360.97
			Subtotal	4,073,819.14	7,421,875.13	4,076,842.88			1.669	28,973.02	-3,114.95	25,858.07
Fund: Capital Projects												
1112	10411	CP	WF	205,587.16	5,003.02	205,587.16				0.00	0.00	0.00
			Subtotal	205,587.16	5,003.02	205,587.16				0.00	0.00	0.00
Fund: Capital Projects 2018												
SYS10417	10418	CP2018	LNSTR	1,414,829.94	5,039,798.15	1,414,829.94		0.280	0.324	4,118.79	0.00	4,118.79
			Subtotal	1,414,829.94	5,039,798.15	1,414,829.94			0.324	4,118.79	0.00	4,118.79
Fund: General												
SYS10417	10432	GEN	LNSTR	10,236,464.38	16,895,682.23	10,236,464.38		0.420	0.393	16,728.62	0.00	16,728.62
1112	10413	GEN	WF	704,774.28	549,244.37	704,774.28				0.00	0.00	0.00
			Subtotal	10,941,238.66	17,444,926.60	10,941,238.66			0.380	16,728.62	0.00	16,728.62

Wimberley ISD
Interest Earnings
June 1, 2020 - August 31, 2020

CUSIP	Investment #	Fund	Issuer	Ending Par Value	Beginning Book Value	Ending Book Value	Maturity Date	Current Rate	Adjusted Interest Earnings			
									Annualized Yield	Interest Earned	Amortization/ Accretion	Adjusted Interest Earnings
Fund: Interest and Sinking												
SYS10417	10433	IS	LNSTR	2,029,467.72	6,064,574.29	2,029,467.72		0.280	0.375	5,730.51	0.00	5,730.51
1112	10412	IS	WF	353,260.78	578.98	353,260.78				0.00	0.00	0.00
			Subtotal	2,382,728.50	6,065,153.27	2,382,728.50			0.375	5,730.51	0.00	5,730.51
Fund: Payroll												
1112	10415	PYRLL	WF	364,196.34	335,878.61	364,196.34				0.00	0.00	0.00
			Subtotal	364,196.34	335,878.61	364,196.34				0.00	0.00	0.00
			Total	20,010,118.38	37,005,792.31	20,013,142.12			0.587	55,969.37	-3,114.95	52,854.42



Wimberley ISD
Amortization Schedule
June 1, 2020 - August 31, 2020
Sorted By Fund - Maturity Date

TCG Advisors, LP
 900 S Capital of Texas Hwy
 350
 Austin, TX 78746
 (512)600-5200

Investment #	Maturity Date	Beginning Par Value				Amounts Amortized				
Issuer	Fund	Amort. Date	Current Rate	Purchase Principal	Original Premium or Discount	Ending Book Value	And Unamortized As of 06/01/2020	Amount Amortized This Period	Amt Amortized Through 08/31/2020	Amount Unamortized Through 08/31/2020
Bond Fund										
10422	BOND	07/15/2020	1,500,000.00	1,476,235.94	-23,764.06	0.00	21,841.97	1,922.09	23,764.06	0.00
U.S. Treasury			1.500				-1,922.09			
10443	BOND	08/07/2020	1,815,000.00	1,807,028.92	-7,971.08	0.00	3,593.52	4,377.56	7,971.08	0.00
Bayerische Landesbank			1.300				-4,377.56			
10434	BOND	09/30/2020	230,000.00	228,578.52	-1,421.48	229,905.45	1,026.99	299.94	1,326.93	-94.55
U.S. Treasury			1.375				-394.49			
10435	BOND	09/30/2020	245,000.00	244,441.21	-558.79	244,953.57	365.05	147.31	512.36	-46.43
U.S. Treasury			1.375				-193.74			
10436	BOND	09/30/2020	3,500,000.00	3,530,376.56	30,376.56	3,503,090.95	-17,479.85	-9,805.76	-27,285.61	3,090.95
U.S. Treasury			2.750				12,896.71			
10437	BOND	12/31/2020	95,000.00	95,195.70	195.70	95,073.77	-65.84	-56.09	-121.93	73.77
U.S. Treasury			1.750				129.86			
			Subtotal	7,381,856.85	-3,143.15	4,073,023.74	9,281.84	-3,114.95	6,166.89	3,023.74
							6,138.69			
			Total	7,381,856.85	-3,143.15	4,073,023.74	9,281.84	-3,114.95	6,166.89	3,023.74
							6,138.69			



Wimberley ISD
Accrued Interest
Sorted by Fund - Maturity Date
June 1, 2020 - August 31, 2020

TCG Advisors, LP
 900 S Capital of Texas Hwy
 350
 Austin, TX 78746
 (512)600-5200

CUSIP	Investment #	Security Type	Par Value	Maturity Date	Current Rate	* Beginning Accrued Interest	Adjusted Acc'd Int. at Purchase During Period	Interest Earned	Interest Received	* Ending Accrued Interest
Activity										
1112	10400	PA1	262,313.35			0.00	0.00	0.00	0.00	0.00
SYS10417	10441	RRP	291,467.12		0.280	0.00	0.00	418.43	418.43	0.00
		Subtotal	553,780.47			0.00	0.00	418.43	418.43	0.00
Accounts Payable										
1112	10414	PA1	73,938.17			0.00	0.00	0.00	0.00	0.00
		Subtotal	73,938.17			0.00	0.00	0.00	0.00	0.00
Bond Fund										
TD MM	10431	RR2	3,819.14		0.015	0.00	0.00	0.45	0.45	0.00
9128282J8	10422	TRC	0.00	07/15/2020	1.500	8,530.22	0.00	2,719.78	11,250.00	0.00
07274LH75	10443	ACP	0.00	08/07/2020	1.300	0.00	0.00	0.00	0.00	0.00
912828L65	10434	TRC	230,000.00	09/30/2020	1.375	535.72	0.00	794.95	0.00	1,330.67
912828L65	10435	TRC	245,000.00	09/30/2020	1.375	570.66	0.00	846.79	0.00	1,417.45
9128285B2	10436	TRC	3,500,000.00	09/30/2020	2.750	16,304.64	0.00	24,193.99	0.00	40,498.63
912828N48	10437	TRC	95,000.00	12/31/2020	1.750	698.80	0.00	417.06	831.25	284.61
		Subtotal	4,073,819.14			26,640.04	0.00	28,973.02	12,081.70	43,531.36
Capital Projects										
1112	10411	PA1	205,587.16			0.00	0.00	0.00	0.00	0.00
		Subtotal	205,587.16			0.00	0.00	0.00	0.00	0.00
Capital Projects 2016										
SYS10417	10417	RRP	0.00		1.760	0.00	0.00	0.00	0.00	0.00
		Subtotal	0.00			0.00	0.00	0.00	0.00	0.00
Capital Projects 2018										
SYS10417	10418	RRP	1,414,829.94		0.280	0.00	0.00	4,118.79	4,118.79	0.00
		Subtotal	1,414,829.94			0.00	0.00	4,118.79	4,118.79	0.00
General										
1112	10413	PA1	704,774.28			0.00	0.00	0.00	0.00	0.00
SYS10417	10432	RRP	10,236,464.38		0.420	0.00	0.00	16,728.62	16,728.62	0.00
		Subtotal	10,941,238.66			0.00	0.00	16,728.62	16,728.62	0.00
Interest and Sinking										

* Beginning Accrued may not include investments that redeemed in the previous month that had outstanding accrued interest. Ending Accrued includes outstanding purchase interest.

**Wimberley ISD
Accrued Interest
Sorted by Fund - Maturity Date**

CUSIP	Investment #	Security Type	Par Value	Maturity Date	Current Rate	* Beginning Accrued Interest	Adjusted Acc'd Int. at Purchase During Period	Interest Earned	Interest Received	* Ending Accrued Interest
Interest and Sinking										
1112	10412	PA1	353,260.78			0.00	0.00	0.00	0.00	0.00
SYS10417	10433	RRP	2,029,467.72		0.280	0.00	0.00	5,730.51	5,730.51	0.00
		Subtotal	2,382,728.50			0.00	0.00	5,730.51	5,730.51	0.00
Payroll										
1112	10415	PA1	364,196.34			0.00	0.00	0.00	0.00	0.00
		Subtotal	364,196.34			0.00	0.00	0.00	0.00	0.00
		Total	20,010,118.38			26,640.04	0.00	55,969.37	39,078.05	43,531.36

* Beginning Accrued may not include investments that redeemed in the previous month that had outstanding accrued interest. Ending Accrued includes outstanding purchase interest.



**Wimberley ISD
Inventory by Maturity Report
August 31, 2020**

TCG Advisors, LP
900 S Capital of Texas Hwy
350
Austin, TX 78746
(512)600-5200

CUSIP	Investment #	Fund	Sec. Type	Issuer	Purchase Date	Book Value	Current Rate	Maturity Date	Maturity Amount	Total Days	Par Value	YTM		Days to Maturity
												360	365	
912828L65	10434	BOND	TRC	U.S. Treasury	07/22/2019	229,905.45	1.375	09/30/2020	230,000.00	436	230,000.00	1.885	1.911	29
912828L65	10435	BOND	TRC	U.S. Treasury	10/17/2019	244,953.57	1.375	09/30/2020	245,000.00	349	245,000.00	1.605	1.628	29
9128285B2	10436	BOND	TRC	U.S. Treasury	12/20/2019	3,503,090.95	2.750	09/30/2020	3,500,000.00	285	3,500,000.00	1.601	1.623	29
912828N48	10437	BOND	TRC	U.S. Treasury	02/14/2020	95,073.77	1.750	12/31/2020	95,000.00	321	95,000.00	1.521	1.542	121
Subtotal and Average						4,073,023.74			4,070,000.00		4,070,000.00	1.615	1.638	31
Net Maturities and Average						4,073,023.74			4,070,000.00		4,070,000.00	1.615	1.638	31



**Wimberley ISD
Projected Cashflow Report
Sorted by Monthly**

TCG Advisors, LP
900 S Capital of Texas Hwy
350
Austin, TX 78746
(512)600-5200

For the Period September 1, 2020 - February 28, 2021

Projected Trans. Date	Investment #	Fund	Security ID	Transaction Type	Issuer	Par Value	Original Cost	Principal	Interest	Total
September 2020										
09/30/2020	10434	BOND	912828L65	Maturity	U.S. Treasury	230,000.00	228,553.52	230,000.00	1,581.25	231,581.25
09/30/2020	10435	BOND	912828L65	Maturity	U.S. Treasury	245,000.00	244,416.21	245,000.00	1,684.38	246,684.38
09/30/2020	10436	BOND	9128285B2	Maturity	U.S. Treasury	3,500,000.00	3,530,351.56	3,500,000.00	48,125.00	3,548,125.00
Total for September 2020						3,975,000.00	4,003,321.29	3,975,000.00	51,390.63	4,026,390.63
December 2020										
12/31/2020	10437	BOND	912828N48	Maturity	U.S. Treasury	95,000.00	95,170.70	95,000.00	831.25	95,831.25
Total for December 2020						95,000.00	95,170.70	95,000.00	831.25	95,831.25
GRAND TOTALS:						4,070,000.00	4,098,491.99	4,070,000.00	52,221.88	4,122,221.88



**Wimberley ISD
Credit Rating Report
August 31, 2020
Sorted by S&P - Maturity Date**

TCG Advisors, LP
900 S Capital of Texas Hwy
350
Austin, TX 78746
(512)600-5200

Investment #	Issuer	Security #	Purchase Principal	Book Value	Market Value	S&P Rating	Moody's Rating	Purchase Date	Maturity Date	Days To Maturity	Stated Rate	YTM	% of Total
10400	WF	1112	262,313.35	262,313.35	262,313.35	None	None	01/01/2019		1			1.31
10411	WF	1112	205,587.16	205,587.16	205,587.16	None	None	01/01/2019		1			1.03
10412	WF	1112	353,260.78	353,260.78	353,260.78	None	None	01/01/2019		1			1.77
10413	WF	1112	704,774.28	704,774.28	704,774.28	None	None	01/01/2019		1			3.52
10414	WF	1112	73,938.17	73,938.17	73,938.17	None	None	01/01/2019		1			0.37
10415	WF	1112	364,196.34	364,196.34	364,196.34	None	None	01/01/2019		1			1.82
10417	LNSTR	SYS10417	0.00	0.00	0.00	None	None	01/01/2019		1	2.630	2.630	0.00
10418	LNSTR	SYS10417	1,414,829.94	1,414,829.94	1,414,829.94	None	None	01/01/2019		1	2.630	2.630	7.07
10431	TDMM	TD MM	3,819.14	3,819.14	3,819.14	None	None	01/01/2019		1	1.670	1.670	0.02
10432	LNSTR	SYS10417	10,236,464.38	10,236,464.38	10,236,464.38	None	None	01/01/2019		1	2.630	2.630	51.15
10433	LNSTR	SYS10417	2,029,467.72	2,029,467.72	2,029,467.72	None	None	01/01/2019		1	2.630	2.630	10.14
10441	LNSTR	SYS10417	291,467.12	291,467.12	291,467.12	None	None	03/06/2020		1	1.610	1.610	1.46
10434	USTR	912828L65	228,553.52	229,905.45	230,230.39	None	Aaa	07/22/2019	09/30/2020	29	1.375	1.911	1.15
10435	USTR	912828L65	244,416.21	244,953.57	245,245.42	None	Aaa	10/17/2019	09/30/2020	29	1.375	1.628	1.22
10436	USTR	912828B2	3,530,351.56	3,503,090.95	3,507,317.10	None	Aaa	12/20/2019	09/30/2020	29	2.750	1.623	17.50
10437	USTR	912828N48	95,170.70	95,073.77	95,512.11	None	Aaa	02/14/2020	12/31/2020	121	1.750	1.542	0.48
SubTotal for No Specified Rating			20,038,610.37	20,013,142.12	20,018,423.40					7	2.344	2.155	100.01



Wimberley ISD
Texas Compliance Change in Val Report
Sorted by Fund
June 1, 2020 - August 31, 2020

TCG Advisors, LP
 900 S Capital of Texas Hwy
 350
 Austin, TX 78746
 (512)600-5200

Inv #	Issuer	Fund	Purch Date	Interest Accrual	Beginning Book Value				Ending Book Value
Cusip	Par Value	YTM	Mat Date	Interest Received	Beginning Market Value	Purchases/ Additions	Redemptions	Change in Value	Ending Market Value
Fund: Activity									
10400	WF	ACT	01/01/2019	0.00	178,709.73	197,583.47	113,979.85	83,603.62	262,313.35
1112	262,313.35	0.000	/ /	0.00	178,709.73	197,583.47	113,979.85	83,603.62	262,313.35
10441	LNSTR	ACT	03/06/2020	418.43	398,923.69	418.43	107,875.00	-107,456.57	291,467.12
SYS10417	291,467.12	0.280	/ /	418.43	398,923.69	418.43	107,875.00	-107,456.57	291,467.12
Sub Totals For: Fund: Activity				418.43	577,633.42	198,001.90	221,854.85	-23,852.95	553,780.47
				418.43	577,633.42	198,001.90	221,854.85	-23,852.95	553,780.47
Fund: Accounts Payable									
10414	WF	ACTPYB	01/01/2019	0.00	115,524.11	8,592,516.49	8,634,102.43	-41,585.94	73,938.17
1112	73,938.17	0.000	/ /	0.00	115,524.11	8,592,516.49	8,634,102.43	-41,585.94	73,938.17
Sub Totals For: Fund: Accounts Payable				0.00	115,524.11	8,592,516.49	8,634,102.43	-41,585.94	73,938.17
				0.00	115,524.11	8,592,516.49	8,634,102.43	-41,585.94	73,938.17
Fund: Bond Fund									
10422	USTR	BOND	01/18/2019	2,719.78	1,498,077.91	0.00	1,500,000.00	-1,498,077.91	0.00
9128282J8	0.00	0.000	07/15/2020	11,250.00	1,502,500.50	0.00	1,500,000.00	-1,502,500.50	0.00
10431	TDMM	BOND	01/01/2019	0.45	30,736.44	3,327,081.70	3,353,999.00	-26,917.30	3,819.14
TD MM	3,819.14	0.014	/ /	0.45	30,736.44	3,327,081.70	3,353,999.00	-26,917.30	3,819.14
10434	USTR	BOND	07/22/2019	794.95	229,605.51	0.00	0.00	299.94	229,905.45
912828L65	230,000.00	1.910	09/30/2020	0.00	230,898.43	0.00	0.00	-668.04	230,230.39
10435	USTR	BOND	10/17/2019	846.79	244,806.26	0.00	0.00	147.31	244,953.57
912828L65	245,000.00	1.627	09/30/2020	0.00	245,957.02	0.00	0.00	-711.60	245,245.42
10436	USTR	BOND	12/20/2019	24,193.99	3,512,896.71	0.00	0.00	-9,805.76	3,503,090.95
9128285B2	3,500,000.00	1.623	09/30/2020	0.00	3,529,394.40	0.00	0.00	-22,077.30	3,507,317.10

Wimberley ISD
Texas Compliance Change in Val Report
June 1, 2020 - August 31, 2020

Inv #	Issuer	Fund	Purch Date	Interest Accrual	Beginning Book Value	Purchases/ Additions	Redemptions	Change in Value	Ending Book Value
Cusip	Par Value	YTM	Mat Date	Interest Received	Beginning Market Value				Ending Market Value
10437	USTR	BOND	02/14/2020	417.06	95,129.86	0.00	0.00	-56.09	95,073.77
912828N48	95,000.00	1.542	12/31/2020	625.72	95,860.94	0.00	0.00	-348.83	95,512.11
10443	BAY	BOND	04/07/2020	0.00	1,810,622.44	0.00	1,815,000.00	-1,810,622.44	0.00
07274LH75	0.00	0.000	08/07/2020	0.00	1,813,870.53	0.00	1,815,000.00	-1,813,870.53	0.00
Sub Totals For: Fund: Bond Fund				28,973.02	7,421,875.13	3,327,081.70	6,668,999.00	-3,345,032.25	4,076,842.88
				11,876.17	7,449,218.26	3,327,081.70	6,668,999.00	-3,367,094.10	4,082,124.16
Fund: Capital Projects									
10411	WF	CP	01/01/2019	0.00	5,003.02	7,179,874.41	6,979,290.27	200,584.14	205,587.16
1112	205,587.16	0.000	/ /	0.00	5,003.02	7,179,874.41	6,979,290.27	200,584.14	205,587.16
Sub Totals For: Fund: Capital Projects				0.00	5,003.02	7,179,874.41	6,979,290.27	200,584.14	205,587.16
				0.00	5,003.02	7,179,874.41	6,979,290.27	200,584.14	205,587.16
Fund: Capital Projects 201									
10417	LNSTR	CP2016	01/01/2019	0.00	0.00	0.00	0.00	0.00	0.00
SYS10417	0.00	1.760	/ /	0.00	0.00	0.00	0.00	0.00	0.00
Sub Totals For: Fund: Capital Projects 201				0.00	0.00	0.00	0.00	0.00	0.00
				0.00	0.00	0.00	0.00	0.00	0.00
Fund: Capital Projects 201									
10418	LNSTR	CP2018	01/01/2019	4,118.79	5,039,798.15	3,354,118.79	6,979,087.00	-3,624,968.21	1,414,829.94
SYS10417	1,414,829.94	0.280	/ /	4,118.79	5,039,798.15	3,354,118.79	6,979,087.00	-3,624,968.21	1,414,829.94
Sub Totals For: Fund: Capital Projects 201				4,118.79	5,039,798.15	3,354,118.79	6,979,087.00	-3,624,968.21	1,414,829.94
				4,118.79	5,039,798.15	3,354,118.79	6,979,087.00	-3,624,968.21	1,414,829.94
Fund: General									
10413	WF	GEN	01/01/2019	0.00	549,244.37	9,160,047.47	9,004,517.56	155,529.91	704,774.28
1112	704,774.28	0.000	/ /	0.00	549,244.37	9,160,047.47	9,004,517.56	155,529.91	704,774.28
10432	LNSTR	GEN	01/01/2019	16,728.62	16,895,682.23	1,789,387.15	8,448,605.00	-6,659,217.85	10,236,464.38
SYS10417	10,236,464.38	0.420	/ /	16,728.62	16,895,682.23	1,789,387.15	8,448,605.00	-6,659,217.85	10,236,464.38

Wimberley ISD
Texas Compliance Change in Val Report
June 1, 2020 - August 31, 2020

Inv #	Issuer	Fund	Purch Date	Interest Accrual	Beginning Book Value				Ending Book Value
Cusip	Par Value	YTM	Mat Date	Interest Received	Beginning Market Value	Purchases/ Additions	Redemptions	Change in Value	Ending Market Value
Sub Totals For: Fund: General				16,728.62	17,444,926.60	10,949,434.62	17,453,122.56	-6,503,687.94	10,941,238.66
				16,728.62	17,444,926.60	10,949,434.62	17,453,122.56	-6,503,687.94	10,941,238.66
Fund: Interest and Sinking									
10412	WF	IS	01/01/2019	0.00	578.98	4,507,796.25	4,155,114.45	352,681.80	353,260.78
1112	353,260.78	0.000	/ /	0.00	578.98	4,507,796.25	4,155,114.45	352,681.80	353,260.78
10433	LNSTR	IS	01/01/2019	5,730.51	6,064,574.29	118,758.43	4,153,865.00	-4,035,106.57	2,029,467.72
SYS10417	2,029,467.72	0.280	/ /	5,730.51	6,064,574.29	118,758.43	4,153,865.00	-4,035,106.57	2,029,467.72
Sub Totals For: Fund: Interest and Sinking				5,730.51	6,065,153.27	4,626,554.68	8,308,979.45	-3,682,424.77	2,382,728.50
				5,730.51	6,065,153.27	4,626,554.68	8,308,979.45	-3,682,424.77	2,382,728.50
Fund: Payroll									
10415	WF	PYRLL	01/01/2019	0.00	335,878.61	5,023,681.39	4,995,363.66	28,317.73	364,196.34
1112	364,196.34	0.000	/ /	0.00	335,878.61	5,023,681.39	4,995,363.66	28,317.73	364,196.34
Sub Totals For: Fund: Payroll				0.00	335,878.61	5,023,681.39	4,995,363.66	28,317.73	364,196.34
				0.00	335,878.61	5,023,681.39	4,995,363.66	28,317.73	364,196.34
Report Grand Totals:				55,969.37	37,005,792.31	43,251,263.98	60,240,799.22	-16,992,650.19	20,013,142.12
				38,872.52	37,033,135.44	43,251,263.98	60,240,799.22	-17,014,712.04	20,018,423.40

GLOSSARY	
PAR VALUE	The face value of investment.
MARKET VALUE	The face value multiplied by the market price. It is the last reported price from the report date.
BOOK VALUE	The cost of a bond, plus or minus adjustments for purchase discount or premium adjustments.
AMORTIZATION/ACCRETION	Amortization (accretion) is the process of reducing (increasing) the original cost of the investment on a daily basis in order to equal par value at maturity. Amortization calculations vary by investment type and the basis associated with the type of investment.
SECURITY TYPE DEFINITIONS	Security types are broad category of investments with similar characteristics and risk features such as agency securities, corporate bonds, municipal bonds, and money markets. Codes within the system are utilized to make calculations based on the underlying security. Security type labels are customizable.
ACP	Commercial Paper
FAC	Federal Agency Coupon Securities
PA1	Checking Accounts
RR2	Money Market Accounts
RRP	Investment Pools
TRC	Treasury Coupon Securities
PURCHASE PRINCIPAL	The original cost of the bond. Par value multiplied by purchase price.
PREMIUM/DISCOUNT	A bond with price below 100 is discount. A bond with price above 100 is premium.
ADJUSTED INTEREST EARNINGS	Net between interest earned and amortization/accretion adjustments within a report period.
EFFECTIVE RATE OF RETURN	Interest earnings adjusted for amortization of premiums and accretion for discounts plus any realized gain or loss divided by the average daily balance of the portfolio divided by 365 and then multiplied by the actual days in the report period.
YIELD TO MATURITY	The yield of an investment as of the purchase date assuming that the bond is held to maturity.
YTM 360	The yield is based on a hypothetical year that has only 360 days.
YTM 365	The yield is based on a 365-day year.
REMAINING COST	The original cost of an investment taking into consideration any partial sales or redemptions for the par value that remains.
STATED RATE	Coupon rate (yield the bond paid on its issue date).
CURRENT RATE	A bond's annual return based on its annual coupon payments and current price (as opposed to its original price or face).

AGENDA ITEMS

FY20

Monthly

Action	POLICY - Updates, Local amendments	
Consent	Budget Amendment, Student enrollment, Minutes	
Presentation	Campus, Community, Business Recognition	
Reports	Health, Safety, SRO	SRO included w/packet
	CFO	Financials, check register
	Principals, Spec Edu Director	incl in packet
	Athletic Director	Athletic Events
	Curriculum	
	Superintendent	Auxiliary & Para-professional activity
Board President	Agenda calendar	
S E P	Consent	Textbook Adoption Committee List
	Principals	Campus Improvement Plan
	Reports	Health, Safety, SRO
	Reports	Superintendent
O C T	Reports	Curriculum
	Reports	Superintendent
	Reports	Board President
N O V	Canvassing	November BOT Election
	Action	Board members take the Oath of Office
	Election	Board officers
D E C	Reports	Health
	Action	Supt Evaluation process & evaluation instrument
	Consent	Annual Financial Audit
	Reports	Curriculum
	Reports	Superintendent
J A N	Reports	Board President
		NOTE: Superintendent evaluation workshop
	Closed	Supt Evaluation
F E B	Public Hearing	Financial Integrity Rating System of TX (FIRST) Report
	Action	District calendar
	Public Hearing	TAPR
M A R	Closed	Adm contracts - D.Howard, M.Santiago, J.Valentine, G.Howard, A.Pope, D.Richardson,
	Consent	IMAT Certification
	Consent	Textbook selection
	Reports	Principals, Spec Edu Director
A P R	Consent	Textbook Adoption
	Reports	CFO
M a y	Discussion	Discussion & appv of addl staffing
	Consent	Destruction of Records
J U N	Reports	CFO
	Reports	Curriculum
	Reports	Board President
J U L	Action	Student Code of Conduct
	Discussion	Student / Parent Handbook
	Consent	RESOLUTION - Hazardous traffic conditions
	Curriculum	District Improvement Plan
	Reports	CFO
	Workshop	Budget Workshop

A U G	Action	RESOLUTION - contract extention	Perdue, Brandon, Fielder, Collins & Mott
	Action	ELECTION: Nov election	
	Reports	Status Report - Perdue, Brandon, Fielder, Collins & Mott LLP	
	Principals	Campus Improvement Plan	JWE, Danforth, WHS
	Reports	Superintendent	
	Reports	Board President	Election timeline
B U D G E T	Workshop	Budget Workshop	
	Action	Compensatory Education Budget	
	Action	Compensation Plan used to calculate salaries budget	
	Action	BUDGET: adoption of budget	
	Action	TAX RATE: adoption of WISD Tax Rate	
	Action	BUDGET: final budget amendment	
Public Hearing	proposed budget and tax rate		

General Election Timeline

November 3, 2020

Places 6 and 7

- ✓ **June 18, 2020:** Deadline to post Notice of Candidate filing deadline
- ✓ **July 18, 2020:** First day to file for place on ballot (Saturday). WISD will accept applications on Monday, July 20, 2020.
- ✓ **August 17, 2020:** Last day to file for place on ballot (Deadline 5:00 p.m.)
- ✓ **August 17, 2020:** Last day to order the general election – Regular Board Meeting

* Order the General Election DEADLINE

✓ * Contract with Hays County Election Administrator

✓ * InterLocal with Hays County Election Administrator

- ✓ **August 21, 2020:** Last day to file a Declaration of Write-in Candidacy
- ✓ **August 24, 2020:** *First day to CANCEL election, if **all** places are unopposed.*

✓ **Recommended deadline to hold Ballot Position Drawing for Candidates, if two or more filed for a single place*

October 13-November 1, 2020: Early Voting in person

November 3, 2020: Uniform Election Day (7:00 a.m. - 7:00 p.m.)

November 6 - 17, 2020: Canvass election

Board Request - Campbell

Dottie Busby

From: Campbell, Rob <rob.campbell@wimberleyisd.net> on behalf of Campbell, Rob
Sent: Monday, September 7, 2020 2:41 PM
To: Dottie Busby; Joe Malone
Subject: September Agenda Item

Dottie~

Would you please add "The Big Serve" for September's agenda?

I'd like to run lead on a community-wide service day on MLK day. I'll recruit the various helping hands organizations in town.

Joe~

If you have any questions, then feel free to give me a call. I only want one representative from each organization on the task group. For WISD, I am requesting to be appointed.

Thanks for your consideration, Rob

CONFIDENTIALITY NOTICE: This email & attached documents may contain confidential information. All information is intended only for the use of the named recipient. If you are not the named recipient, you are not authorized to read, disclose, copy, distribute or take any action in reliance on the information and any action other than immediate delivery to the named recipient is strictly prohibited. If you have received this email in error, do not read the information and please immediately notify sender by telephone to arrange for a return of the original documents. If you are the named recipient you are not authorized to reveal any of this information to any other unauthorized person. If you did not receive all pages listed or if pages are not legible, please immediately notify sender by phone.

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

From: **Lori Olson** <loriolson4wisd@gmail.com>
Date: Mon, Sep 14, 2020 at 2:50 PM
Subject: Re: Band Email Clarification
To: York, Dwain <dwain.york@wimberleyisd.net>

This study brings up another issue that I have raised, which is that of air filtration. I trust you have read this, but wanted to call your attention to these bullets, so that you can check with Eddie on how WISD might make improvements to our campus filtration systems:

"Existing HVAC systems should be fitted with HEPA filters if possible.

- There are HEPA air purifiers on the market to provide additional filtration appropriate to the size of the rehearsal space which will increase the air change rate from standard HVAC systems."

Let me know your thoughts.

Lori

Dottie Busby

From: Jack Damron <Jack.Damron@tasb.org> on behalf of Jack Damron
Sent: Thursday, August 27, 2020 1:51 PM
Subject: We Need to Hear Your District's Voice--Register Your Delegate (and Alternate) for the TASB Virtual Delegate Assembly Soon

Importance: High

All,

There are still a number of districts that have not yet registered a delegate for the upcoming TASB virtual Delegate Assembly on October 3rd. **Registration is free and the delegate does not have to be registered for the TASA/TASB Convention this year.** And on top of that **the Delegate and Alternate will receive 3 hours of Board Training Credit** from the convenience of their home (using their computer, laptop or cell phone).

I know how busy you are, but the next legislative session is going to be a financial battleground and public schools must have their most critical needs met. The Delegate Assembly gives our Governmental Relations team a better idea of where to focus its energy in support of our school districts, and for that reason I highly encourage your district's involvement in this important process.

To register your delegate and alternate, please see the link in the announcement below. It also includes some additional information about events leading up to the DA. To ensure that they get a hard copy of the Delegate Handbook, we need delegate names by September 2nd. Registration does continue, however, until October 1st and those who register beyond the September 2nd deadline will be able to access the documents (including the Delegate Handbook) electronically.

Consider registering your district's delegate today! And if you've already registered, thank you so much!

Respectfully,



TASB Jack Damron

Field Service Representative

Texas Association of School Boards

12007 Research Blvd. • Austin, Texas 78759-2439

800-580-8272, ext. 2970

512-340-2970

jack.damron@tasb.org



Texas Association of School Boards

That's right! This year, the TASB Delegate Assembly is going virtual. The date and time for the meeting remain as originally scheduled: **October 3 at 2 p.m.** With no travel required, it is easier than ever for your board to participate and get started on your advocacy work.

School districts will be facing many issues in the next legislative session. The Assembly is your board's opportunity to have a voice in TASB's advocacy action plan.

Register your delegate and alternate!

Preregistration deadline is September 2. This will ensure your delegate and alternate receive a hard copy of the *Delegate Handbook*. **The final registration deadline is October 1 at 2 p.m.**

Delegates and alternates must be registered by this date to receive all the necessary electronic access information for the meeting.

Superintendents and administrative assistants can access registration in [myTASB](#). Or complete the [delegate registration form](#) (pdf) and submit to TASB.

Key changes for this year's Assembly

TASB leadership and staff are working on the plans and will share the full details when meeting materials are mailed in September. In the meantime, here are two things you need to know:

1. Delegates will be asked to vote on the 2020 Assembly standing rules in early September. With going virtual, the timeline for Assembly activities has changed, and delegates will vote on the standing rules and process in advance. The voting link will be sent by email, so **please make sure your delegate has a valid email address in [myTASB](#).**
2. Delegates and alternates are invited to **attend one of three virtual caucus and orientation meetings set for September 16, 17, and 18.** Your representatives can choose the date that best fits their schedules. Complete details will be provided with Assembly materials.

If you have questions, please contact TASB staff at membercommunications@tasb.org or 800.580.8272, ext. 3573.

We are looking forward to "seeing" you at the virtual Delegate Assembly!

Your friends at TASB

You are receiving this important member information because of your position at a school district whose board is an Active Member of TASB. If this information was in error, please contact Michael Pennant at michael.pennant@tasb.org or 800.580.8272.