

Board Meeting
Monday, February 26, 2024 5:30 PM

Carrie L. Lovejoy Child Development Center:
Library
256 Country Club Road
Allen, TX 75002

Agenda

1. Call to Order
Presenter: Barrett Owens, President
2. Roll Call and Announcement by President that a quorum is present, that the meeting has been duly called, and that notice of the meeting has been duly posted for time and manner as required by law
3. Closed Session, Gov't. Code 551.071-551.084. The Board May Retire into Closed Session in Accordance with the Texas Open Meetings Act
Presenter: Barrett Owens, President
 - 3.A. 551-071 For the purpose of a private consultation with its attorney only when it seeks the attorney's advice about pending or contemplated litigation or a settlement offer or on a matter in which the duty of the attorney to the Board under the Texas Disciplinary Rules of Professional Conduct of the State Bar of Texas clearly conflicts with the requirement for open meetings.
 - 3.A.1. Consultation with legal counsel regarding Board Policy EFB (LOCAL) and the Texas State Library And Archive Commission (TSLAC) standards.
 - 3.B. 551-072 For the purpose of deliberating the purchase, exchange, lease, or value of real property if deliberation in an open meeting would have a detrimental effect on the position of the District in negotiations with a third person.
 - 3.C. 551-073 For the purpose of deliberating a negotiated contract for a prospective gift donation to the District if deliberation in an open meeting would have a detrimental effect on the Board's position in negotiations with a third person.
 - 3.D. 551-074 For the purpose of deliberating the appointment, employment, evaluation, reassignment, duties, discipline, or dismissal of a public officer or employee or to hear a complaint or charge against an officer or employee. However, the Board may not conduct a closed meeting for these purposes if the officer or employee who is the subject of the deliberation or hearing requests a public hearing.
 - 3.D.1. Evaluation of employees.
 - 3.D.2. Superintendent's Contract.
 - 3.D.3. Consultation and deliberation with Board's attorney regarding identified probationary contract employees.
 - 3.D.4. Discussion regarding reduction in force due to recommended program changes in accordance with Board Policy DFFB (LOCAL).
 - 3.E.551-076 For the purpose of deliberating the deployment, or specific occasions for implementation, of security personnel, devices or security audits.
 - 3.E.1. Security Devices.
 - 3.F.551-082 For the purpose of deliberating in a case involving discipline of a public school child, or in which a complaint or charge is brought against a District employee by another employee and the complaint or charge directly results in the

need for a hearing. However, the Board may not conduct a closed meeting for this purpose if the employee against whom the complaint or charge is brought makes a written request for an open hearing.

3.G. 551-0821 For the purpose of deliberating a matter regarding a student if personally identifiable information about the student will necessarily be revealed by the deliberation. This exception does not apply if an open meeting about the matter is requested in writing by a parent or guardian of the student or by the student if the student has attained 18 years of age.

3.H. 551-083 For the purpose of discussing or deliberating the standards, guidelines, terms or conditions the Board will follow, or will instruct its representative to follow, in consultation with representatives of employee groups.

3.I. 551-084 For the purpose of excluding a witness from a hearing during the examination of another witness.

4. Return to Open Meeting for Action, If Necessary, On Matters Discussed In Closed Session

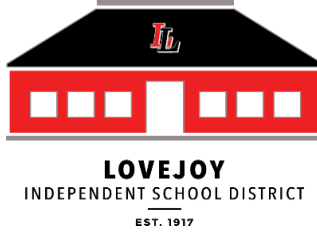
Presenter: Barrett Owens, President

5. Opening Exercise

Presenter: Barrett Owens, President

5.A. Pledges

Presenter: Holly Haynes, Principal, Puster Elementary School



Lovejoy Independent School District Board of Trustees

Date of Meeting	February 26, 2024
Document Title	February Pledge Leader
Presented For	Board Action X Report/Review Only
Supporting Documents	X None Attached Provided Later
Administrator Responsible	Rodricka Taylor, Coordinator for the Superintendent and Board Services

Executive Summary

The pledges will be led by Puster Elementary School students:

Quinn McNeill, 2nd Grade

Family/Outside of School: Gymnastics flips

Favorite thing about Puster: That I get to be at school to learn and play with all my friends.

One thing I'd change about Puster: Everyday you'd draw "You've Been Spotted" on the announcements.

Callie McNeill, 3rd Grade

Family/Outside of School: Musical theater and ride horses and play piano

Favorite thing about Puster: I have lots of friends here and it's a friendly place to be.

One thing I'd change about Puster: The lunch times - 3rd grade's lunch is too early.

Griffith McNeill, 4th Grade

Family/Outside of School: Baseball - plays 2nd base for the LJ Leopards and golf

Favorite thing about Puster: The community - how if there's someone on the buddy bench there will always be someone who will go and ask to play with them.

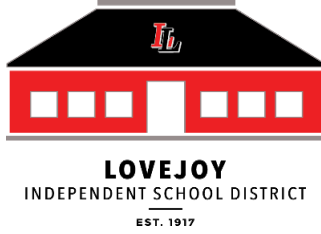
One thing I'd change about Puster: Nothing really.

6. Recognitions

Presenter: Barrett Owens, President

6.A. Student Recognitions: Band, Cheer, and Choir

Presenter: Dr. Travis Zambiasi, Principal, Lovejoy High School

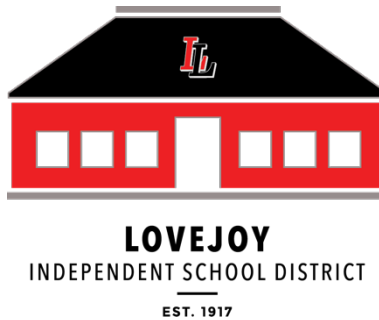


Lovejoy Independent School District Board of Trustees

Date of Meeting	February 26, 2024
Document Title	Student Recognitions: Band, Cheer, and Choir
Presented For	Board Action X Report/Review Only
Supporting Documents	X None Attached Provided Later
Administrator Responsible	Dr. Travis Zambiasi, Principal, Lovejoy High School
Executive Summary	
<p>Lovejoy ISD is proud to recognize the following for their participation and accomplishments in their respective State competitions:</p> <ul style="list-style-type: none"> ● Band - 4 Students All State Qualifiers ● Cheer- 5th Place Overall in the State Championship ● Choir - 1 Student All State Qualifier 	
Fiscal Implications	
No fiscal implications.	
Administrator Recommendation	
No administrator recommendation.	
District Priority	
<p>Priority 1: Lovejoy ISD students will live our Legacy of Excellence by learning at high levels and graduating life ready.</p>	

7. Public Comments Related to February 26, 2024 Agenda Items

Presenter: Rodricka Taylor, Coordinator for the Superintendent and Board Services



Public Comment Procedures

Regular Meetings

Submitting for Public Comment

Any individual seeking to speak during the public comment session of a regular board meeting must complete and submit the public comment card by no later than 15 minutes prior to the designated start time provided on the meeting notice.

Public comment cards must be completed in their entirety with accurate and truthful information and must designate whether the speaker is speaking on a specific agenda item. Failure to designate an agenda item relevant to the speaker's comments will result in the classification of the public comment as a non-agenda item comment, to be heard at a later time in the meeting.

The Board will provide speakers that submit a public comment card on an agenda item the opportunity to speak prior to the Board's consideration of the item in the order in which they were received.

Public comment cards are only applicable to the meeting in which they are completed and submitted by the established deadline.

Each individual gets one opportunity per meeting to share their comments with the Board of Trustees, not multiple opportunities per individual agenda items.

If a speaker is not present when his/her name is called, the speaker forfeits the opportunity to speak at that meeting.

The comments made by speakers at public comment reflect the opinions solely of the speaker and not the Board of Trustees as a governing body or the District.

Order of Agenda and Limitations

The Board reserves the right to change the order of the agenda items on the notice of meeting and / or defer agenda items until a later date.

Each speaker will be provided up to three minutes to address the Board of Trustees unless more than 10 speakers sign up to speak, in which case, the presiding officer reserves the right to reduce the time allotted to each speaker to no less than one minute per speaker. (Board Policy BED (LOCAL)).

If at any time, in the opinion of the presiding officer, the individual speaker is attempting to address a non-agenda item in the agenda item public comment period, the presiding officer or designee may stop the speaker and defer the speaker's comments to the appropriate portion of the meeting.

Public comments relating to non-agenda items will be deferred until the end of the meeting if time permits, unless otherwise noted by the Board of Trustees.

Disruptive Behavior

Disruptive behavior will not be tolerated in the meeting. If after the provision of a single warning, the disruptive behavior continues, the disruptive individual may be escorted out of the meeting by District officials and/or law enforcement.

It is a criminal offense for a person, with intent to prevent or disrupt a lawful meeting, to substantially obstruct or interfere with the ordinary conduct of a meeting by physical action or verbal utterance.

Conduct defined by Texas Penal Code §42.01 and Board Policies BED (LEGAL) and BED (LOCAL).

Failure to yield the podium at the conclusion of the time allotted to a speaker at public comment constitutes a disruption and will be addressed accordingly.

Comments made to the Board of Trustees by meeting attendees and/or speakers outside of the designated public comment periods during a meeting constitute a disruption.

Board's Response to Public Comment

Specific factual information or recitation of existing policy may be furnished in response to inquiries, but the Board shall not deliberate or decide regarding any subject that is not included on the agenda posted with notice of the meeting. The Board may also refer a speaker to a staff member in authority over the issue.

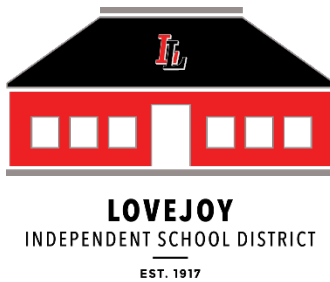
For specific complaints or concerns, speakers are encouraged to utilize the District's appropriate grievance procedures and policies set forth in Board Policies FNG (LOCAL), DGBA (LOCAL), and GF (LOCAL).

Special Meetings

The procedures outlined herein apply to special called Board meetings. However, comments at special called Board meetings are limited to agenda items only.

Statement of Non-Discrimination

The Board does not discriminate against speech on the basis of viewpoint.



School Board Public Comments Sign In February 26, 2024

The Board of Trustees encourages public comment. All public comment at a meeting other than a regularly scheduled meeting should be limited to agenda items posted for the meeting. By signing up to provide public comment at a Board meeting, you are acknowledging and accepting the procedures for public comment available online at lovejoyisd.net.

Any individual seeking to speak during the public comment session of a regular board meeting must complete and submit the public comment card by no later than 15 minutes prior to the designated start time provided on the meeting notice. Public comment cards must be completed in their entirety with accurate and truthful information and must designate whether the speaker is speaking on a specific agenda item. Failure to designate an agenda item relevant to the speaker's comments will result in the classification of the public comment as a non-agenda item comment, to be heard at a later time in the meeting. Public comment cards are only applicable to the meeting in which they are completed and submitted by the established deadline.

Each individual will have one opportunity per meeting to share their comments with the Board of Trustees, not multiple opportunities per individual agenda items. If a speaker is not present when his/her name is called, the speaker forfeits the opportunity to speak at that meeting. All speakers will be limited to no more than three minutes. The presiding officer reserves the right to reduce the number of minutes per speaker to no less than one minute per speaker in order to maintain effective meeting management. The speakers will be recognized in the order in which each person signs up. If there are more speakers than time allotted for public comment, the amount of time per speaker may be reduced, as determined appropriate by the Board of Trustees. If time does not allow for you to speak at public comment, the Board of Trustees may allot additional time for public comment or defer specific agenda items for review at a subsequent meeting in an effort to allow more public comment, as determined necessary by the Board. This public comment card will not be maintained from one meeting to the next and is only applicable to the meeting on the date in which it was submitted.

If you have a specific concern related to an employee of the District or a specific student issue, you are encouraged to utilize the District's grievance procedures provided in Board Policies DGBA (LOCAL), FNG (LOCAL), and GF (LOCAL) or applicable grievance process. Each grievance procedure allows for an individual to redress grievances with the Board of Trustees. All relevant policies are available online at lovejoyisd.net.

Disruptive behavior will not be tolerated in the meeting. If after the provision of a single warning, the disruptive behavior continues, the disruptive individual may be escorted out of the meeting by District officials and/or law enforcement. It is a criminal offense for a person, with intent to prevent or disrupt a lawful meeting, to substantially obstruct or interfere with the ordinary conduct of a meeting by physical action or verbal utterance.

The Board of Trustees appreciates your active participation in the school district.

***I wish to address the Board about an agenda item on the February 26, 2024 agenda.**

I wish to speak about agenda item #_____ which is titled:

***I wish to participate in the open forum by speaking about the following topic:**

First and Last Name:

Address:

Phone:

Organization and Campus(es) your student(s) attend (if applicable):

Printed Name & Signature (Acknowledging you have read the procedures above)

Print:

Signature:

Date:

8. Invocation

Presenter: Barrett Owens, President

9. Board Notifications

9.A. Notification of New Hires

Presenter: Anna Koenig, Executive Director of Human Resources and Communications



LOVEJOY
INDEPENDENT SCHOOL DISTRICT
EST. 1917

Lovejoy Independent School District Board of Trustees

Date of Meeting	February 26, 2024
Document Title	Notification of New Hires
Presented For	Board Action X Report/Review Only
Supporting Documents	None X Attached Provided Later
Administrator Responsible	Anna Koenig, Executive Director of Human Resources and Communications
Executive Summary	
The new hire list is attached for board notification. This is not an action item.	
Fiscal Implications	
Positions will be included in the 2023-2024 budget adjustment and multiyear projection.	
Administrator Recommendation	
Report/Review Only. No administrator recommendation.	
District Priority	
Priority 2: Lovejoy ISD will value employees as our greatest asset in serving students.	



LOVEJOY
INDEPENDENT SCHOOL DISTRICT
EST. 1917

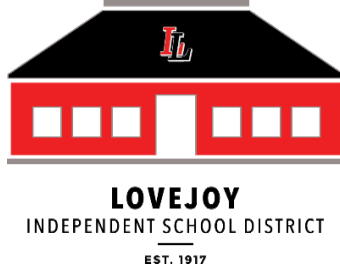
NOTIFICATION OF NEW HIRES

February 26, 2024

Professional New Hires							
Grade levels or teaching assignments reflect current positions and are subject to change per employee contract							
February 26, 2024							
Professional Staff	Residence	University	Certification(s)	Exp	Previous Employer	Campus	Current Assignment
David Branscom	Hurst, TX	Univ of Mary Hardin-Baylor TX (Bachelors and Masters)	Physical Education EC-12	20	GCISD (Grapevine HS)	LHS	Defensive Coordinator Coach/Teacher
Todd Dodge	Horseshoe Bay, TX	Univ of TX, Austin (Bachelors)	Health 7-12; History 7-12	22	Eanes ISD	Admin/LHS	Athletic Director and Head Football Coach
Morgan Guinn	Conroe, TX	Sam Houston State Univ, TX (Bachelors)	Theatre EC-12	0	N/A - First Year Teacher	WSMS	Theatre Teacher
Persephone McPeters	Greenville, TX	Arkansas State Univ	Licensed Specialist in School Psychology	5	Princeton ISD	Admin	LSSP - School Psychologist
Brandon Murdock	Austin, TX	Oklahoma State Univ (Bachelors)	Social Studies 8-12	18	Westlake HS	LHS	Assistant Head Football Coach/Teacher
Bryan Sparrow	Allen, TX	Texas Tech Univ (Bachelors)	Tech Apps EC-12; Generalist 4-8; Art EC-12	13	Universal Billards	LHS	CTE/Digital Media Teacher
Marshall Williams	Fort Worth, TX	Sam Houston State Univ, TX (Bachelors)	History 8-12	20	Keller ISD	LHS	Offensive Coordinator Coach/Teacher

9.B. Notification of Resignations

Presenter: Anna Koenig, Executive Director of Human Resources and Communications



Lovejoy Independent School District Board of Trustees

Date of Meeting	February 26, 2024
Document Title	Notification of Resignations
Presented For	Board Action <input type="checkbox"/> Report/Review Only
Supporting Documents	None <input checked="" type="checkbox"/> Attached <input type="checkbox"/> Provided Later
Administrator Responsible	Anna Koenig, Executive Director of Human Resources and Communications
Executive Summary	
Resignations are attached for Board notification. This is not an action item.	
Fiscal Implications	
No fiscal implications.	
Administrator Recommendation	
Report/Review Only. No administrator recommendation.	
District Priority	
Priority 2: Lovejoy ISD will value employees as our greatest asset in serving students.	



LOVEJOY
INDEPENDENT SCHOOL DISTRICT
EST. 1917

Notifications of Resignations

February 26, 2024

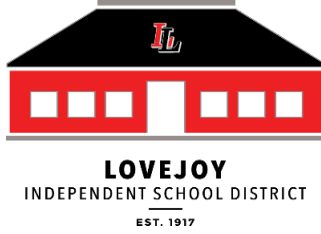
Professional Resignations

February 26, 2024

Name	Position	Location	Last Day
Pam Ford	Teacher 9-12	LHS	5/25/2024
Andria Harris	Teacher 9-12	LHS	1/19/2024
Tracy Henderson	Payroll Coordinator	Admin	3/15/2024
Kirby Hulme	Teacher 8-7	WSMS	5/25/2024
Carla Parker	Teacher K-4	PES	5/25/2024
Bhuvaneshwari Prabakar	Teacher K-4	HES	2/16/2024
Theodore Wolf	Teacher 9-12	LHS	1/18/2024

9.C. Notification of Public Information Requests Report

Presenter: Rodricka Taylor, Coordinator for the Superintendent and Board Services



Lovejoy Independent School District Board of Trustees

Date of Meeting	February 26, 2024
Document Title	Public Information Requests Report
Presented For	Board Action X Report/Review Only
Supporting Documents	None X Attached Provided Later
Administrator Responsible	Rodricka Taylor, Coordinator for the Superintendent and Board Services
Executive Summary	
Public information requests are provided for report/review.	
Fiscal Implications	
No fiscal implications.	
Administrator Recommendation	
No administrator recommendation.	
District Priority	
Priority 3: Lovejoy ISD will prioritize community, connection, and communication.	

Date Submitted	Request	Name	Approx. Hours Spent
1/8/2024	<p>Good morning,</p> <p>I would like to order an updated Public Information Open Records Report for all 2023 - 2024 Lovejoy ISD - Texas employees. Please include the following information in the EXCEL format report.</p> <ul style="list-style-type: none"> - First name - Middle name - Last name - School/Facility - Position/job function - Hire date - Years in Lovejoy ISD - Work e-mail address - Work contact phone number <p>Thanks for your assistance. If you have any questions, please get in touch with me at any time.</p> <p>I look forward to receiving this information within ten business days.</p> <p>Respectfully,</p>	Kimberly Maneja	0.5
1/9/2024	<p>SmartProcure is submitting a public records request to the Lovejoy ISD for purchase order records created from 9/29/2023 to current. The request is limited to readily available records without physically copying, scanning, or printing paper documents.</p> <p>The specific information requested from your record-keeping system is:</p> <ol style="list-style-type: none"> 1. Purchase order number 2. Purchase date 3. Line item details (Detailed description of the purchase) 4. Line item quantity 5. Line item price 6. Vendor ID number, name, address, contact person and their email address <p>The following Ascender query can be used to fulfill this request: DReq1450PrintPurchOrdForm</p>	Eric Chung w/Smart Procure	0.5
1/16/2024	<p>Hi,</p> <p>Name: Era Quintanilla</p> <p>Phone number: (254) 253-5514</p> <p>Address: 4017 Freshwater Dr, Carrollton TX 75007</p> <p>Preferred method to send over information: Email</p> <p>I would like to order a current updated OPEN RECORDS REPORT for ALL 2023-2024 employees of Lovejoy ISD. Please include the following information in the EXCEL SPREADSHEET (view/electronic) format report:</p> <ul style="list-style-type: none"> - First name - Middle name/initial - Last name - School/facility - Position/job function - Hire date - How many years in Lovejoy ISD - E-mail address - Work contact phone number - TRS years of service <p>Please let me know if you need any more information to complete this request. I look forward to receiving this information within 10 business days.</p> <p>Respectfully,</p> <p>ERP Support Team support@educationretirement.org</p>	Education Retirement Support	0.5
1/19/2024	<p>Hello Rodricka,</p> <p>Please see below. Thank you.</p> <p>Under the Texas Public Information Act, Tex. Gov't Code §552.001 et seq., I am requesting an opportunity to inspect or obtain copies of the following public records: 1. Any and all grievances or formal complaints submitted against Ted Wolf or any disciplinary action taken against Ted Wolf. I request that these records be provided in electronic form in their native format. If there are any fees for searching or copying these records, please inform me if the cost will exceed \$25. However, I would also like to request a waiver of all fees in that the disclosure of the requested information is in the public interest. This information is not being sought for commercial purposes. The Texas Public Information Act requires that you "promptly produce" the requested records unless, within 10 days, you have sought an Attorney General's Opinion. If you expect a significant delay in responding to this request, please contact me with information about when I might expect copies or the ability to inspect the requested records. If you deny any or all of this request, please cite each specific exemption you feel justifies the refusal to release the information and notify me of the appeal procedures available to me under the law.</p>	Laura Giles	0.25

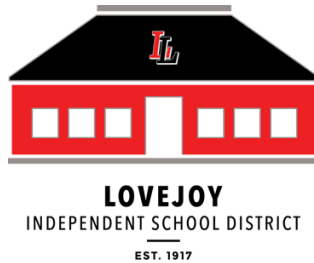
1/20/2024	<p>Please see the attached Public Information Request Form. Further, I have attached an example of the data that I am looking for. My preference is to receive this information via email.</p> <p>I am seeking raw budget data for your 2023-2024 school year. Specifically, I am seeking amounts that each campus allocates to various extra-curricular activity accounts. If this data is not yet available for the 2023-2024 school year, equivalent data for the 2022-2023 school year will suffice. I will attach an example of the requested information from the 2020-2021 Humble ISD budget.</p> <p>Please feel free to contact me via cell phone at your convenience if you have any questions about the data I'm requesting.</p> <p>Please feel free to reach out via phone if you have any questions about the information being requested.</p> <p>Thank you for your assistance!</p> <p>Best,</p> <p>Dillon Rogers</p>	Dillon Rogers	0.5
1/22/2024	<p>Good Morning Rodricka,</p> <p>I hope you are well. Under the Texas Public Information Act, Tex. Gov't Code 552.001 et seq., I am requesting an opportunity to inspect or obtain copies of public records. Please provide an electronic list of current Lovejoy families who reside in the City of Lucas including first names, last names, street address and email addresses. Spreadsheet format is preferred. I agree in advance to any necessary redactions.</p> <p>Should you have any questions or if I can be of assistance please do not hesitate to contact me.</p>	Dusty Kuykendall	1
1/22/2024	<p>Good day, we hope we find you well.</p> <p>We are requesting all ISD employee's public information, which include name, work number, and work email address.</p> <p>Sincerely, Viki Herrera</p>	Vicky Herrera	0.25
01/28/2024	<p>"Hello, This is a request for the following: 1. Todd Dodge salary, stipends, and any other supplemental pay by the district to Todd Dodge (moving expenses, TRS penalties, etc) 2. All district leadership and coordinators' salaries and stipends 3. All principal stipends and salaries 4. All athletic coach's stipends and salaries</p> <p>Thank you"</p>	Betty Dartmouth	

10. Consent Agenda

Presenter: Barrett Owens, President

10.A. Consider Approval of the Minutes of the January 22, 2024 Board Meeting

Presenter: Rodricka Taylor, Coordinator for the Superintendent and Board Services



Board of Trustees Minutes of the Board Meeting and Public Hearing Monday, January 22, 2024

A Board Meeting and Public Hearing of the Lovejoy Independent School District Board of Trustees was held on Monday, January 22, 2024, beginning at 5:00 PM in the Carrie L. Lovejoy Child Development Center, located at 256 Country Club Road, Allen, Texas.

1. Call to Order

Barrett Owens, President

The Meeting was Called to Order at 5:00 PM by Board President, Barrett Owens.

2. Roll Call and Announcement by President that a quorum is present, that the meeting has been duly called, and that notice of the meeting has been duly posted for time and manner as required by law

The following Board Members were present:

Marvin Bobo: Present
Jason Jaynes: Present
Julie McLaughlin: Present
Barrett Owens: Present
Amy Smith: Present
Mark Wheelis: Present
Jeff Wood: Present

3. Closed Session, Gov't. Code 551.071-551.084. The Board May Retire into Closed Session in Accordance with the Texas Open Meetings Act

Barrett Owens, President

The Board retired into Closed Session at 5:00 PM in room C113.

- 3.A. 551-071 For the purpose of a private consultation with its attorney only when it seeks the attorney's advice about pending or contemplated litigation or a settlement offer or on a matter in which the duty of the attorney to the Board under the Texas Disciplinary Rules of Professional Conduct of the State Bar of Texas clearly conflicts with the requirement for open meetings.**
- 3.B. 551-072 For the purpose of deliberating the purchase, exchange, lease, or value of real property if deliberation in an open meeting would have a detrimental effect on the position of the District in negotiations with a third person.**
- 3.C. 551-073 For the purpose of deliberating a negotiated contract for a prospective gift donation to the District if deliberation in an open meeting would have a detrimental effect on the Board's position in negotiations with a third person.**
- 3.D. 551-074 For the purpose of deliberating the appointment, employment, evaluation, reassignment, duties, discipline, or dismissal of a public officer or employee or to hear a complaint or charge against an officer or employee. However, the Board may not conduct a closed meeting for these purposes if the officer or employee who is the subject of the deliberation or hearing requests a public hearing.**
 - 3.D.1. Superintendent's Contract.**
 - 3.D.2. Superintendent's Formative Evaluation.**
 - 3.D.3. Evaluation of Employees.**
 - 3.D.4. Deliberation regarding sending notice of proposed termination and suspension without pay of the probationary contract of James Charles Brown for good cause pursuant to Board Policies DFAA (LEGAL), DFAA (LOCAL), and Texas Education Code 21.104.**
- 3.E. 551-076 For the purpose of deliberating the deployment, or specific occasions for implementation, of security personnel, devices or security audits.**
- 3.F. 551-082 For the purpose of deliberating in a case involving discipline of a public school child, or in which a complaint or charge is brought against a District employee by another employee and the complaint or charge directly results in the need for a hearing. However, the Board may not conduct a closed meeting for this purpose if the employee against whom the complaint or charge is brought makes a written request for an open hearing.**
- 3.G. 551-0821 For the purpose of deliberating a matter regarding a student if personally identifiable information about the student will necessarily be revealed by the deliberation. This exception does not apply if an open meeting about the matter is requested in writing by a parent or guardian of the student or by the student if the student has attained 18 years of age.**
- 3.H. 551-083 For the purpose of discussing or deliberating the standards, guidelines, terms or conditions the Board will follow, or will instruct its**

representative to follow, in consultation with representatives of employee groups.

3.I. 551-084 For the purpose of excluding a witness from a hearing during the examination of another witness.

4. Return to Open Meeting for Action, If Necessary, On Matters Discussed In Closed Session

Barrett Owens, President

5. Opening Exercise

Barrett Owens, President

The Board of Trustees returned to the Open Meeting at 7:28 PM in the Library.

5.A. Pledges

Shannon Acosta, Interim Principal, Hart Elementary School

Shannon Acosta, Interim Principal of Hart Elementary School, introduced 3rd graders, William Rios who led the Pledge of Allegiance and the Texas Pledge.

6. Recognitions

Barrett Owens, President

6.A. Board Appreciation Month 2024

Katie Kordel, Superintendent

Katie Kordel, Superintendent, recognized the Lovejoy ISD Board of Trustees, for their dedicated service to the students, staff, and community.

7. Public Comments Related to January 22, 2024 Agenda Items

Rodricka Taylor, Coordinator for the Superintendent and Board Services

There were no public comments as related to the January 22, 2024 Agenda Items.

8. Invocation

Barrett Owens, President

Board President, Barrett Owens, led the Invocation.

9. Board Notifications

9.A. Notification of New Hires

Anna Koenig, Executive Director of Human Resources and Communications

Anna Koenig, Executive Director of Human Resources and Communications, notified the Board of new hires.

9.B. Notification of Resignations

Anna Koenig, Executive Director of Human Resources and Communications

Anna Koenig, Executive Director of Human Resources and Communications, notified the Board of resignations.

9.C. Notification of Public Information Requests Report

Rodricka Taylor, Coordinator for the Superintendent and Board Services

Rodricka Taylor, Coordinator for the Superintendent and Board Services, notified the Board of the Public Information Requests report.

10. Consent Agenda

Barrett Owens, President

10.A. Consider Approval of the Minutes of the December 11, 2023 Board Meeting

Rodricka Taylor, Coordinator for the Superintendent and Board Services

10.B. Consider Approval of the Minutes of the January 10, 2024 Board Workshop

Rodricka Taylor, Coordinator for the Superintendent and Board Services

10.C. Consider Approval of the Monthly Finance Report

Thomas Willman, Chief Financial Officer

10.D. Consider Approval of the Quarterly Investment Report

Thomas Willman, Chief Financial Officer

10.E. Consider Approval of the 2023-2024 Budget Amendment #2

Thomas Willman, Chief Financial Officer

10.F. Consider Approval of the 2024-2025 Professional Development Waiver Days

Dr. Laurie Tinsley, Assistant Superintendent of Curriculum and Instruction

10.G. Consider Approval of the use of Bond Funds for Appetgy - Website and Communications

Anna Koenig, Executive Director of Human Resources and Communications

Motion to approve the Consent Agenda. This motion made by Jeff Wood and seconded by Marvin Bobo, Passed.

Yea: 7, Nay: 0, Absent: 0

11. Presentation: Celebration of Learning

Dr. Laurie Tinsley, Assistant Superintendent of Curriculum and Instruction

Dr. Laurie Tinsley, Assistant Superintendent of Curriculum and Instruction, provided a presentation on Celebration of Learning.

12. Consideration and Possible Action on the Hart Elementary School Principal

Katie Kordel, Superintendent

Motion to approve the Hart Elementary School Principal. This motion made by Mark Wheelis and seconded by Julie McLaughlin, Passed.

Yea: 7, Nay: 0, Absent: 0

13. Consider and Act on the Formative Superintendent Evaluation

Barrett Owens, President

Motion to approve the Formative Superintendent Evaluation. This motion made by Julie McLaughlin and seconded by Mark Wheelis, Passed.

Yea: 7, Nay: 0, Absent: 0

14. Consideration and Possible Action Regarding the Recommendation of the Superintendent to Notice of Proposed Termination and Suspension without Pay of the Probationary Contract of James Charles Brown for Good Cause Pursuant to Board Policies DFAA (LEGAL), DFAA (LOCAL), and Texas Education Code 21.104.

Katie Kordel, Superintendent

Motion to approve the Recommendation of the Superintendent to Notice of Proposed Termination and Suspension without Pay of the Probationary Contract of James Charles Brown for Good Cause Pursuant to Board Policies DFAA (LEGAL), DFAA (LOCAL), and Texas Education Code 21.104. This motion made by Jason Jaynes and seconded by Jeff Wood, Passed.

Yea: 7, Nay: 0, Absent: 0

15. Consider and Act on Calling a School Trustee General Election for May 4, 2024

Rodricka Taylor, Coordinator for the Superintendent and Board Services

Motion to approve Calling a School Trustee General Election for May 4, 2024. This motion made by Jeff Wood and seconded by Amy Smith, Passed.

Yea: 7, Nay: 0, Absent: 0

16. Consider and Act on the 2024-2025 Innovative Course Recommendation

Dr. Laurie Tinsley, Assistant Superintendent of Curriculum and Instruction

Motion to approve the 2024-2025 Innovative Course Recommendation. This motion made by Amy Smith and seconded by Mark Wheelis, Passed.

Yea: 7, Nay: 0, Absent: 0

17. Presentation: Board Legislative Subcommittee Update

Barrett Owens, President

The Board Legislative Subcommittee held a discussion and provided a presentation on the Board Legislative Subcommittee Update.

18. Open a Public Hearing on the 2022-2023 Texas Academic Performance Report (TAPR)

Barrett Owens, President

Board President Owens opened the 2022-2023 Texas Academic Performance Report (TAPR) Public Hearing at 8:19 PM.

19. Presentation: 2022-2023 Texas Academic Performance Report (TAPR)

Dr. Laurie Tinsley, Assistant Superintendent of Curriculum and Instruction

Dr. Laurie Tinsley, Assistant Superintendent of Curriculum and Instruction, provided a presentation on the 2022-2023 Texas Academic Performance Report (TAPR).

20. Close a Public Hearing on the 2022-2023 Texas Academic Performance Report (TAPR)

Barrett Owens, President

Board President Owens closed the 2022-2023 Texas Academic Performance Report (TAPR) Public Hearing at 8:24 PM.

21. Budget Workshop #2

Thomas Willman, Chief Financial Officer

Thomas Willman, Chief Financial Officer, provided a presentation on the Budget Workshop #2.

22. Cabinet Reports

Executive Cabinet Members

The following Executive Cabinet Members presented reports:

22.A. Curriculum and Instruction - Audio Visual Projects Updates

Dr. Laurie Tinsley, Assistant Superintendent of Curriculum and Instruction

22.B. Finance - Tax Collections and Student Nutrition Updates

Thomas Willman, Chief Financial Officer

22.C. Human Resources and Communications - "Who We Are" Communications Updates

Anna Koenig, Executive Director of Human Resources and Communications

22.D. Student Services - Lovejoy High School Musical and Transportation Updates

Kevin Parker, Executive Director of Student Services

22.E. District Support Services - Custodial, Maintenance, Grounds, and Safety and Security Updates

Kyle Pursifull, Executive Director of District Support Services

23. Superintendent's Report

Katie Kordel, Superintendent

Katie Kordel, Superintendent, thanked the auxiliary staff for their hard work. Our transportation, custodial, and maintenance teams took great effort to make a warm and safe environment on Tuesday, January 16th. They started their day at 4:00am warming the buses and salting the pathways for our students and staff. Superintendent Kordel spoke about the Capital Planning Committee Spring 2024 kickoff meeting. The District is looking forward to deep dive into strategic capital planning for Lovejoy ISD.

24. Public Comments Related to Non-Agenda Items

Rodricka Taylor, Coordinator for the Superintendent and Board Services

There were no public comments as related to the Non-Agenda Items.

25. Announcements

Barrett Owens, President

There were no announcements made by President Owens.

26. Adjournment

Barrett Owens, President

With there being no further business, the Board adjourned at 9:00 PM.

Respectfully submitted,

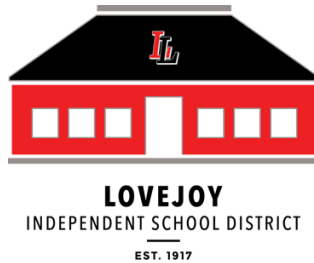
Jeff Wood, Secretary of the Board of Trustees

Barrett Owens, President of the Board of Trustees

**Agenda item details are filed in the Superintendent's Office with the Monday, January 22, 2024 agenda packet.*

**These are unofficial board minutes that have not yet been approved by the Board of Trustees.*

10.B. Consider Approval of the Minutes of the January 27, 2024 Special Board Meeting
Presenter: Rodricka Taylor, Coordinator for the Superintendent and Board Services



Board of Trustees Minutes of the Special Board of Trustees Meeting Saturday, January 27, 2024

A Special Board of Trustees Meeting of the Lovejoy Independent School District Board of Trustees was held on Saturday, January 27, 2024, beginning at 9:00 AM in the Carrie L. Lovejoy Child Development Center, located at 256 Country Club Road, Allen, Texas.

1. Call to Order

Barrett Owens, President

The Meeting was Called to Order at 9:00 AM by Board President, Barrett Owens.

2. Roll Call and Announcement by President that a quorum is present, that the meeting has been duly called, and that notice of the meeting has been duly posted for time and manner as required by law

Barrett Owens, President

The following Board Members were present:

Marvin Bobo: Present
Jason Jaynes: Present
Julie McLaughlin: Present
Barrett Owens: Present
Amy Smith: Present
Mark Wheelis: Present
Jeff Wood: Present

3. Closed Session, Gov't. Code 551.071-551.084. The Board May Retire into Closed Session in Accordance with the Texas Open Meetings Act

Barrett Owens, President

The Board retired into Closed Session at 9:00 AM in room C113.

- 3.A. 551-071 For the purpose of a private consultation with its attorney only when it seeks the attorney's advice about pending or contemplated litigation or a settlement offer or on a matter in which the duty of the attorney to the Board under the Texas Disciplinary Rules of Professional Conduct of the State Bar of Texas clearly conflicts with the requirement for open meetings.**
- 3.B. 551-072 For the purpose of deliberating the purchase, exchange, lease, or value of real property if deliberation in an open meeting would have a detrimental effect on the position of the District in negotiations with a third person.**
- 3.C. 551-073 For the purpose of deliberating a negotiated contract for a prospective gift donation to the District if deliberation in an open meeting would have a detrimental effect on the Board's position in negotiations with a third person.**
- 3.D. 551-074 For the purpose of deliberating the appointment, employment, evaluation, reassignment, duties, discipline, or dismissal of a public officer or employee or to hear a complaint or charge against an officer or employee. However, the Board may not conduct a closed meeting for these purposes if the officer or employee who is the subject of the deliberation or hearing requests a public hearing.**
 - 3.D.1. Evaluation of Employees.**
 - 3.D.2. Deliberating the Appointment of Athletic Director and Head Football Coach.**
- 3.E. 551-076 For the purpose of deliberating the deployment, or specific occasions for implementation, of security personnel, devices or security audits.**
- 3.F. 551-082 For the purpose of deliberating in a case involving discipline of a public school child, or in which a complaint or charge is brought against a District employee by another employee and the complaint or charge directly results in the need for a hearing. However, the Board may not conduct a closed meeting for this purpose if the employee against whom the complaint or charge is brought makes a written request for an open hearing.**
- 3.G. 551-0821 For the purpose of deliberating a matter regarding a student if personally identifiable information about the student will necessarily be revealed by the deliberation. This exception does not apply if an open meeting about the matter is requested in writing by a parent or guardian of the student or by the student if the student has attained 18 years of age.**
- 3.H. 551-083 For the purpose of discussing or deliberating the standards, guidelines, terms or conditions the Board will follow, or will instruct its representative to follow, in consultation with representatives of employee groups.**
- 3.I. 551-084 For the purpose of excluding a witness from a hearing during the examination of another witness.**

4. Return to Open Meeting for Action, If Necessary, On Matters Discussed In Closed Session

Barrett Owens, President

The Board of Trustees returned to the Open Meeting at 7:34 AM in the Library.

5. Public Comments Related to January 27, 2024 Agenda Items

Rodricka Taylor, Coordinator for the Superintendent and Board Services

There were no public comments as related to the January 27, 2024 Agenda Items.

6. Consideration and Possible Action on Athletic Director and Head Football Coach

Katie Kordel, Superintendent

Motion to approve the Athletic Director and Head Football Coach. This motion made by Jeff Wood and seconded by Julie McLaughlin, Passed.

Yea: 7, Nay: 0, Absent: 0

7. Announcements

Barrett Owens, President

President Owens welcomed Coach Todd Dodge to Lovejoy ISD.

8. Adjournment

Barrett Owens, President

With there being no further business, the Board adjourned at 9:36 AM.

Respectfully submitted,

Jeff Wood, Secretary of the Board of Trustees

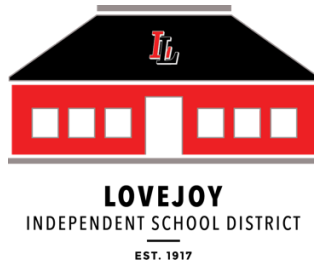
Barrett Owens, President of the Board of Trustees

**Agenda item details are filed in the Superintendent's Office with the Saturday, January 27, 2024 agenda packet.*

**These are unofficial board minutes that have not yet been approved by the Board of Trustees.*

10.C. Consider Approval of the Minutes of the February 13, 2024 Board Training

Presenter: Rodricka Taylor, Coordinator for the Superintendent and Board Services



Board of Trustees Minutes of the Board Training Tuesday, February 13, 2024

A Board Training of the Lovejoy Independent School District Board of Trustees was held on Tuesday, February 13, 2024, beginning at 11:00 AM in the Carrie L. Lovejoy Child Development Center, Room D100 located at 256 Country Club Road, Allen, Texas.

1. Call to Order

Barrett Owens, President

The Meeting was Called to Order at 11:00 AM by Board President, Barrett Owens.

2. Roll Call and Announcement by President that a quorum is present, that the meeting has been duly called, and that notice of the meeting has been duly posted for time and manner as required by law

Barrett Owens, President

The following Board Members were present:

Marvin Bobo: Present
Jason Jaynes: Present
Julie McLaughlin: Present
Barrett Owens: Present
Amy Smith: Present
Mark Wheelis: Present
Jeff Wood: Present

2.A. 551-071 For the purpose of a private consultation with its attorney only when it seeks the attorney's advice about pending or contemplated litigation or a settlement offer or on a matter in which the duty of the attorney to the Board under the Texas Disciplinary Rules of

Professional Conduct of the State Bar of Texas clearly conflicts with the requirement for open meetings.

- 2.B. 551-072 For the purpose of deliberating the purchase, exchange, lease, or value of real property if deliberation in an open meeting would have a detrimental effect on the position of the District in negotiations with a third person.
 - 2.C. 551-073 For the purpose of deliberating a negotiated contract for a prospective gift donation to the District if deliberation in an open meeting would have a detrimental effect on the Board's position in negotiations with a third person.
 - 2.D. 551-074 For the purpose of deliberating the appointment, employment, evaluation, reassignment, duties, discipline, or dismissal of a public officer or employee or to hear a complaint or charge against an officer or employee. However, the Board may not conduct a closed meeting for these purposes if the officer or employee who is the subject of the deliberation or hearing requests a public hearing.
 - 2.E. 551-076 For the purpose of deliberating the deployment, or specific occasions for implementation, of security personnel, devices or security audits.
 - 2.F. 551-082 For the purpose of deliberating in a case involving discipline of a public school child, or in which a complaint or charge is brought against a District employee by another employee and the complaint or charge directly results in the need for a hearing. However, the Board may not conduct a closed meeting for this purpose if the employee against whom the complaint or charge is brought makes a written request for an open hearing.
 - 2.G. 551-0821 For the purpose of deliberating a matter regarding a student if personally identifiable information about the student will necessarily be revealed by the deliberation. This exception does not apply if an open meeting about the matter is requested in writing by a parent or guardian of the student or by the student if the student has attained 18 years of age.
 - 2.H. 551-083 For the purpose of discussing or deliberating the standards, guidelines, terms or conditions the Board will follow, or will instruct its representative to follow, in consultation with representatives of employee groups.
 - 2.I. 551-084 For the purpose of excluding a witness from a hearing during the examination of another witness.
3. **Return to Open Meeting for Action, If Necessary, On Matters Discussed In Closed Session**
Barrett Owens, President
4. **Team of Eight Training**

The Team of 8 (The Board of Trustees and Superintendent) held a Team of 8 training.

5. Adjournment

Barrett Owens, President

With there being no further business, the Board adjourned at 2:47 PM.

Respectfully submitted,

Jeff Wood, Secretary of the Board of Trustees

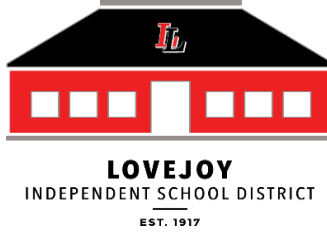
Barrett Owens, President of the Board of Trustees

**Agenda item details are filed in the Superintendent's Office with the Tuesday, February 13, 2024 agenda packet.*

**These are unofficial board minutes that have not yet been approved by the Board of Trustees.*

10.D. Consider Approval of the TASB Localized Policy Update 122

Presenter: Rodricka Taylor, Coordinator for the Superintendent and Board Services



Lovejoy Independent School District Board of Trustees

Date of Meeting	February 26, 2024
Document Title	TASB Localized Policy Manual Update 122
Presented For	X Board Action Report/Review Only
Supporting Documents	None X Attached Provided Later
Administrator Responsible	Rodricka Taylor, Coordinator for the Superintendent and Board Services

Executive Summary

Update 122 covers recommended (LOCAL) policy revisions.

These policy updates were presented for Board review at a previous meeting.

Fiscal Implications

N/A

Administrator Recommendation

It is the recommendation of the Administration that the Board of Trustees approves the TASB Localized Policy Manual Update 122.

District Priority

Priority 1: Lovejoy ISD students will live our Legacy of Excellence by learning at high levels and graduating life ready.

Priority 2: Lovejoy ISD will value employees as our greatest asset in serving students.

Priority 3: Lovejoy ISD will prioritize community, connection, and communication.

Priority 4: Lovejoy ISD will strategically plan for the safety and security of students and staff, financial sustainability, and effective operations.

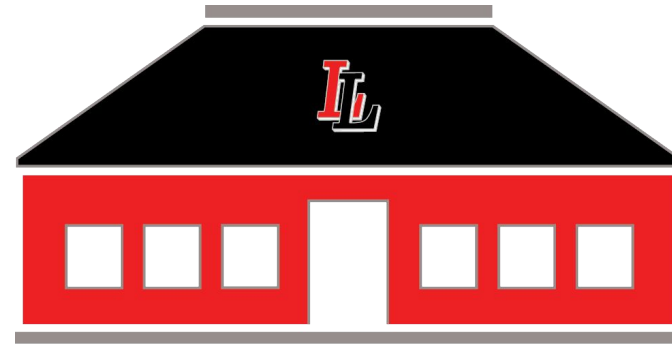
TASB Localized Policy Manual Update 122

RODRICKA TAYLOR

Coordinator for the Superintendent & Board Services

December 11, 2023

Board Meeting



LOVEJOY
INDEPENDENT SCHOOL DISTRICT

EST. 1917

TASB Policy Update 122 Process

(LEGAL) vs. (LOCAL) Policies

(LEGAL) policies: Reflect the ever-changing legal context for governance and management of the district

- Should inform local decision making
- Should NOT be adopted, but only reviewed

(LOCAL) policies:

- Require close attention by both the administration and the board
- Must reflect the practices of the district and the intentions of the board
- May only be changed by board action (adopt, revise, or repeal)

TASB Policy Update 122 (LOCAL)

Details may be found in the provided TASB Local Policy Comparison Packet.

(LOCAL) Policy Action List for consideration at the February Board Meeting:

- CQB (LOCAL) - TECHNOLOGY RESOURCES: CYBERSECURITY
- CSA (LOCAL) - FACILITY STANDARDS: SAFETY AND SECURITY
- DC (LOCAL) - EMPLOYMENT PRACTICES
- ~~DP (LOCAL) - PERSONNEL POSITIONS~~
- EHB (LOCAL) - CURRICULUM DESIGN: SPECIAL PROGRAMS
- EHBC (LOCAL) - SPECIAL PROGRAMS: COMPENSATORY SERVICES AND INTENSIVE PROGRAMS
- EHBCA (LOCAL) - COMPENSATORY SERVICES AND INTENSIVE PROGRAMS: ACCELERATED INSTRUCTION
- ~~EIC (LOCAL) - ACADEMIC ACHIEVEMENT: CLASS RANKING~~
- FEA (LOCAL) - ATTENDANCE: COMPULSORY ATTENDANCE
- FFAC (LOCAL) - WELLNESS AND HEALTHY SERVICES: MEDICAL TREATMENT
- FFB (LOCAL) - STUDENT WELFARE CRISIS INTERVENTION
- FL (LOCAL) - STUDENT RECORDS



THANK YOU

Explanatory Notes

TASB Localized Policy Manual Update 122

Lovejoy ISD

ATTN(NOTE)

GENERAL INFORMATION ABOUT THIS UPDATE

Please note:

Changes at Update 122 are based almost exclusively on legislation from the 88th Regular Legislative Session.

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

Each regular legislative session, legislation is passed that makes nonsubstantive additions, revisions, or corrections to existing statutes. HB 4595 was passed for this purpose in the 88th Regular Legislative Session. Minor nonsubstantive changes throughout Update 122 result from HB 4595 and are not otherwise mentioned in the explanatory notes.

For more information about the bills mentioned throughout and other changes from the 88th Legislative Session, download the free [2023 Legislative Summary for TASB Members](#) PDF from the TASB store.

The *Local Policy Overview* for Update 122, available with your Update 122 materials under [Local Manual Updates](#) on Policy Online® (TASB login required), provides a general, high-level overview of the changes to the local policies included in the update. **Legal policies provide the legal framework for key areas of district operations and are not adopted by the board.**

Changes to the policy manual based on bills from the special called sessions will be included in Update 123.

AF(LEGAL)

INNOVATION DISTRICTS

New and amended Administrative Code rules, effective June 20, 2023, revise the process and timeline for renewing an innovation plan. (See pages 5-6.)

AIB(LEGAL)

ACCOUNTABILITY: PERFORMANCE REPORTING

Provisions regarding remote instruction expired on September 1, 2023, and have been removed from this legal policy.

BBB(LEGAL)

BOARD MEMBERS: ELECTIONS

This legal policy has been updated to increase the population threshold for certain districts to conduct elections jointly with a hospital district. (HB 4559)

BBBA(LEGAL)

ELECTIONS: CONDUCTING ELECTIONS

HB 1217 repeals Election Code provisions creating different requirements for days and hours of early voting at temporary branch polling places in counties with a population under 100,000. The same requirements now apply regardless of county size.

BBBB(LEGAL)

ELECTIONS: POST-ELECTION PROCEDURES

HB 2559 adds retired justices of the peace, the comptroller of public accounts, and former comptrollers to the list of persons authorized to administer an oath in Texas. Because this legal policy includes only the four broadest categories of authorized persons, it has been amended to include retired justices of the peace. (See Oath of Office on page 4.)

Explanatory Notes

TASB Localized Policy Manual Update 122

Lovejoy ISD

BBBC(LLEGAL) ELECTIONS: CAMPAIGN FINANCE

HB 2626 requires all districts, regardless of size, to post campaign finance reports filed with the district on the district website not later than the 10th business day after receipt. Certain address information may be removed before posting, and the reports must remain accessible on the website for five years.

BBC(LLEGAL) BOARD MEMBERS: VACANCIES AND REMOVAL FROM OFFICE

SB 232 implements automatic removal from office for certain criminal offenses. If a board member is removed, the board must fill the vacancy at the first regular meeting following the removal. (See page. 4.)

HB 17 makes nonsubstantive changes to existing law regarding removal of a board member by written petition and trial. (See page 3.)

BBD(LLEGAL) BOARD MEMBERS: TRAINING AND ORIENTATION

The attorney general (AG) may require board members to complete Public Information Act (PIA) training if the AG determines the district has failed to comply with a requirement of the PIA (see page 1). (HB 3033)

BBI(LLEGAL) BOARD MEMBERS: TECHNOLOGY RESOURCES AND ELECTRONIC COMMUNICATIONS

The Note at the beginning of this policy has been updated to include a reference to CQC(LLEGAL), where provisions from SB 1893 regarding prohibited applications on district-owned devices have been added.

BE(LLEGAL) BOARD MEETINGS

HB 3440 requires all districts to post both the notice *and* agenda for a board meeting on the district website under the Open Meetings Act. (See Internet Posting — Notice on page 4.) The bill repeals the previous provision that tied the requirement to post the agenda to the size of a municipality in the district.

C(LLEGAL) BUSINESS AND SUPPORT SERVICES

The Section C table of contents has been revised to rename CKA as Safety Program/Risk Management: Safety and Security Audits and Monitoring. Provisions regarding asbestos management have been moved to a new code CSC, Facility Standards: Asbestos Management.

CCA(LLEGAL) LOCAL REVENUE SOURCES: BOND ISSUES

For bonds authorized at an election after September 1, 2023, HB 3 allows the use of bond proceeds to pay for compliance with school safety and security requirements for school facilities. If TEA finds that the district is not in compliance, the district must use bond proceeds to achieve compliance before using the proceeds for other purposes. (See page 3.)

CDA(LLEGAL) OTHER REVENUES: INVESTMENTS

SB 1246 amends the Public Funds Investment Act to authorize districts to invest in repurchase agreements through a joint account.

CDB(LLEGAL) OTHER REVENUES: SALE, LEASE, OR EXCHANGE OF SCHOOL-OWNED PROPERTY

HB 2518 requires a public property lease between a district and another person to include terms requiring the person to include payment and performance bond requirements in any construction contract the person enters related to the leased property. In addition, the person must provide notice of commencement to the district at least 90 days before any construction begins. (See pages 3-4.)

Explanatory Notes

TASB Localized Policy Manual Update 122

Lovejoy ISD

CHE(LEGAL)

PURCHASING AND ACQUISITION: VENDOR DISCLOSURES AND CONTRACTS

HB 1817 specifies the circumstances under which a district contract is voidable for the vendor's failure to provide the required disclosure of interested parties. (See page 2.)

A provision has been added from HB 900 prohibiting the purchase of library material from vendors included on a list created by TEA. Other provisions of HB 900 are set out in EFB(LEGAL). (See page 10.)

CJA(LEGAL)

CONTRACTED SERVICES: CRIMINAL HISTORY

HB 4123 makes significant changes to the laws regarding criminal history record information (CHRI) reviews by the district and "qualified school contractors," as defined in the bill, and repeals provisions relating to CHRI reviews for certain public works contractors. The bill creates a single statutory approach to CHRI reviews for contractors and their employees.

CK(LEGAL)

SAFETY PROGRAM/RISK MANAGEMENT

Several legislative changes affect this legal policy on safety programs and risk management:

- HB 3 requires sheriffs in counties with a population of less than 350,000 to conduct semiannual meetings to discuss issues related to school safety.
- HB 1905 allows districts to make school safety training courses, including active shooter training courses, available at no cost to employees of private schools or child-care facilities in the district.
- SB 29 prohibits districts from implementing mandates related to COVID-19.

To better present legislative changes related to school safety and make the associated policies easier to use, provisions in this policy related to safety and security audits have been relocated to CKA(LEGAL).

CKA(LEGAL)

SAFETY PROGRAM/RISK MANAGEMENT: SAFETY AND SECURITY AUDITS AND MONITORING

To better present legislative changes related to school safety and make the associated policies easier to use, this legal policy has been renamed Safety and Security Audits and Monitoring, and provisions regarding asbestos management have been relocated to CSC(LEGAL) in the policy series related to facility standards. Provisions regarding safety and security audits have been moved from CK(LEGAL) and amended by HB 3.

Other revisions from HB 3 include new provisions related to the following:

- Monitoring by TEA of district implementation and operation of safety and security requirements through a new office of school safety and security
- Vulnerability assessments by TEA
- Intruder detection audits by regional school safety review teams
- Assignment of a conservator by the commissioner if a district fails to comply with specified safety and security requirements

CKC(LEGAL)

SAFETY PROGRAM/RISK MANAGEMENT: EMERGENCY PLANS

Numerous legislative changes affect this legal policy on emergency plans.

Under HB 3, a district must:

- Adopt a policy for providing notice regarding violent activity at a district campus or facility or at a district-sponsored activity. (See page 1.) [TEA issued a [To the Administrator Addressed letter](#) to provide

Explanatory Notes

TASB Localized Policy Manual Update 122

Lovejoy ISD

guidance to educational leaders on September 7, 2023, with [Guidance on Model Standards for Parental Notification](#) that can be used to develop administrative procedures.]

- Provide the Department of Public Safety (DPS) and local law enforcement with emergency response maps and an opportunity to conduct a walk-through using the maps. (See page 1.)
- Follow TEA guidelines in adopting and implementing the district's multihazard emergency operations plan (EOP) to ensure the safety of students and personnel with disabilities or impairments in a disaster or emergency. TEA must develop the guidelines. (See page 3.)
- Submit its multihazard EOP no later than the 30th day after the Texas School Safety Center (TxSSC) requests it. HB 3 modifies the timelines related to submitting the plan and correcting any deficiencies. (See page 5.)
- Provide information from DPS and TxSSC regarding safe storage of firearms to parents. (See pages 6-7.) [TxSSC released [information](#) on September 1, 2023.]

Provisions have been added to this policy from the Texas Disaster Act regarding confidentiality of certain types of information the district may have related to safety and disaster response. (See pages 7-8.)

CKE(LLEGAL) SAFETY PROGRAM/RISK MANAGEMENT: SECURITY PERSONNEL

Several revisions to this legal policy on security personnel result from HB 3.

- The board must determine the appropriate number of armed security officers for each campus. The board must ensure that at least one armed security officer, as defined by the bill, is present during regular school hours at each campus or claim a good cause exception due to availability of funding or qualified personnel. A board that claims a good cause exception must develop an alternative standard. (See page 1.)
- The board's options as to who may be hired for security purposes are expanded. (See pages 1-2.)
- Security personnel are no longer required to be commissioned peace officers to carry weapons, but a person permitted to carry a firearm on campus may not perform certain law enforcement duties, except in an emergency, unless they are commissioned peace officers. (See page 5.)

HB 3 and SB 999 modify requirements related to active shooter response training. (See page 3.)

HB 1133 allows peace officers providing volunteer security services at school events to wear their uniforms under certain circumstances. (See pages 3-4.)

For more information, see TASB Legal Services' School Law eSource article "[Armed Security Officer Requirement in House Bill 3 \(2023\)](#)."

CKEA(LLEGAL) SECURITY PERSONNEL: COMMISSIONED PEACE OFFICERS

This legal policy has been updated to include existing provisions regarding the circumstances under which a body-worn camera recording may be released. (See page 5.)

CKEB(LLEGAL) SECURITY PERSONNEL: SCHOOL MARSHALS

HB 3623 allows a district to enter into a memorandum of understanding with another district, open-enrollment charter school, or private school to share a school marshal on the other school's campus for certain events. (See page 4.)

CKEC(LLEGAL) SECURITY PERSONNEL: SCHOOL RESOURCE OFFICERS

HB 3 implements requirements for a memorandum of understanding for the provision of school resource officers.

Explanatory Notes

TASB Localized Policy Manual Update 122

Lovejoy ISD

CLA(LLEGAL) BUILDINGS, GROUNDS, AND EQUIPMENT MANAGEMENT: SECURITY

SB 2069 revises the requirements for schools to post human trafficking signs. The signs must now be posted in a conspicuous place reasonably likely to be viewed by employees and visitors.

CLE(LLEGAL) BUILDINGS, GROUNDS, AND EQUIPMENT MANAGEMENT: FLAG DISPLAYS

HB 2012 allows a classroom teacher to display the national motto in a classroom if the poster or framed copy meets existing requirements.

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

HB 1605 makes numerous changes to this legal policy on instructional materials care and accounting, including revisions to permitted expenditures, requisition procedures, requirements related to open education resources (OER), and certification. In addition, districts may be entitled to additional state aid for certain instructional materials.

Administrative code provisions have been deleted to the extent they are superseded by new laws.

CNA(LLEGAL) TRANSPORTATION MANAGEMENT: STUDENT TRANSPORTATION

Duplicative information regarding the transportation of students to accelerated instruction programs has been replaced with a reference on page 7 to EHBCA for more information.

CNC(LLEGAL) TRANSPORTATION MANAGEMENT: TRANSPORTATION SAFETY

HB 2190 changes all references in state law from "accident" to "collision."

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

The list of required internet postings has been updated to include:

- Campaign finance filings at item 18 (HB 2626)
- Item 46 regarding annual reports on measurable outcomes for dropout recovery education programs (SB 1647)

A district may now either post online or provide physical copies of the report on library materials (see item 4 at Optional Internet Postings). (HB 900)

CQB(LLEGAL) TECHNOLOGY RESOURCES: CYBERSECURITY

SB 768 shortens the deadline to notify the attorney general of a system security breach from 60 to 30 days and requires the notice to be submitted electronically. (See page 4.)

SB 271 creates additional notification requirements for "security incidents" as defined in the bill. (See page 6.)

CQB(LOCAL) TECHNOLOGY RESOURCES: CYBERSECURITY

Based on the new notification requirements imposed by SB 271, the security breach notification provisions have been revised to include security incidents.

Explanatory Notes

TASB Localized Policy Manual Update 122

Lovejoy ISD

CQC(LEGAL) TECHNOLOGY RESOURCES: EQUIPMENT

HB 18 amends requirements related to transferring data processing equipment or electronic devices to students. Beginning with the 2023-24 school year, in addition to existing requirements, districts must adopt rules establishing programs that promote parents as partners in cybersecurity and online safety and install filters to block pornographic or obscene materials or applications. TEA must adopt standards for permissible devices and applications used by a district. If necessary, Policy Service will recommend policy revisions following publication of the TEA standards.

SB 1893 requires the district to adopt a policy prohibiting the installation or use of a "covered application," as defined in the bill, on any device owned or leased by the district. (See page 3.) The Department of Information Resources (DIR) and the Department of Public Safety (DPS) must develop a model policy for districts to use in developing the required policy, and the district must adopt the required policy no later than 60 days after the model is released. Policy Service will recommend local policy revisions, as appropriate, following publication of the DIR/DPS model policy.

CS(LEGAL) FACILITY STANDARDS

For clarity and ease of use, this legal policy on Facility Standards has been divided into four codes:

- CS: Facility Standards
- CSA: Safety and Security
- CSB: Gas and Pipelines
- CSC: Asbestos Management

CS includes the existing school facility standards that apply to all district capital improvement projects. Accessibility standards as well as provisions related to portable buildings and outdoor lighting also remain in this policy code.

CSA(LEGAL) FACILITY STANDARDS: SAFETY AND SECURITY

This new policy code regarding safety and security includes existing provisions moved from CS(LEGAL) as well as the commissioner's new school safety rules for facilities, effective May 31, 2023.

HB 3 implements additional safety and security requirements for facilities.

SB 838 requires a district to provide each classroom with silent panic alert technology that allows immediate contact with emergency services and law enforcement. This applies beginning with the 2025-26 school year. (See page 9.)

CSA(LOCAL) FACILITY STANDARDS: SAFETY AND SECURITY

This new local policy on facility safety and security includes recommended provisions addressing audits of building access control to comply with the commissioner's new school safety rules for facilities, effective May 31, 2023.

CSB(LEGAL) FACILITY STANDARDS: SAFETY AND SECURITY

To present legal requirements more clearly, this new legal policy regarding gas and pipelines includes existing provisions moved from CS(LEGAL).

CSC(LEGAL) FACILITY STANDARDS: ASBESTOS MANAGEMENT

To present legal requirements more clearly, existing provisions related to asbestos management have been moved from CKA(LEGAL) to this new policy code.

Explanatory Notes

TASB Localized Policy Manual Update 122

Lovejoy ISD

CV(LEGAL) FACILITIES CONSTRUCTION

This legal policy regarding facilities construction includes several revisions:

- HB 679 prohibits requiring a specified experience modifier in construction contracts or solicitations. (See pages 5-6.)
- HB 3485 allows vendors and subcontractors to elect not to proceed with additional work without a properly executed change order. (See page 8.)
- HB 2518 adds the failure to include required lease terms to the circumstances under which a district may be liable for failure to obtain a payment bond. (See page 13.)
- HB 2965 prohibits the waiver of Government Code Chapter 2272 regarding construction liability claims. (See page 20.)

DBAA(LEGAL) EMPLOYMENT REQUIREMENTS AND RESTRICTIONS: PRE-EMPLOYMENT REVIEWS

Changes to the laws regarding the use, confidentiality, and destruction of criminal history record information (CHRI) are from HB 4123. (See pages 4-5.) Other revisions are to better reflect statutory sources.

DBE(LEGAL) EMPLOYMENT REQUIREMENTS AND RESTRICTIONS: NEPOTISM

HB 1789 provides an exception to the nepotism prohibition for hiring bus drivers if the board approves the employment. (See page 4.)

DC(LOCAL) EMPLOYMENT PRACTICES

HB 1789 creates a nepotism exception for hiring bus drivers, regardless of county population, if the *board* approves employment. We recommend adding a note referring to DBE(LEGAL) (concerning nepotism) to this policy that delegates hiring authority for noncontractual employees to the superintendent as a reminder of the special requirements related to this nepotism exception for bus drivers.

The [Legal Issues in Update 122](#) memo describes common legal concerns and best practices specific to this policy's topic.

Please note: The text at Employment of Contractual Personnel has been lightly edited and reordered for clarity and consistency with policy style.

DEAA(LEGAL) COMPENSATION PLAN: INCENTIVES AND STIPENDS

For at least two school years, a district must assign a mentor teacher to a teacher who has been issued a temporary certificate for military service members and first responders to teach career and technology education (see page 5). (HB 621)

DEC(LEGAL) COMPENSATION AND BENEFITS: LEAVES AND ABSENCES

Two bills impact leave requirements for district police officers and emergency personnel.

- HB 1486 adds full-time telecommunicators authorized under the Occupations Code to those entitled to paid mental health leave after experiencing a traumatic event in the scope of employment. (See page 6.)
- HB 471 requires a district to extend a leave of absence to a police officer or emergency medical services personnel for an illness or injury related to the person's line of duty. (See pages 6-7.)

Explanatory Notes

TASB Localized Policy Manual Update 122

Lovejoy ISD

DF(LEGAL) TERMINATION OF EMPLOYMENT

HB 4520 adds conviction of or placement on deferred adjudication community supervision for sale, distribution, or display of harmful material to a minor as a basis for mandatory termination. (See page 2.)

DG(LEGAL) EMPLOYEE RIGHTS AND PRIVILEGES

Revisions to this legal policy incorporate recent state and federal legislative changes.

- HB 1605 prohibits a district from penalizing a teacher for failure to follow the pacing of instructional materials for a subject in the required curriculum. A classroom teacher is also immune from disciplinary proceedings for violating certain state and federal laws if the teacher used only approved and adopted instructional material and delivered the instruction with fidelity. (See pages 4-5.)
- The federal Providing Urgent Maternal Protections (PUMP) for Nursing Mothers Act, effective December 29, 2022, repealed and replaced prior law requiring breaks for employees to express breast milk. The provisions are not limited to nonexempt employees. (See pages 6-7.)

DGC(LEGAL) EMPLOYEE RIGHTS AND PRIVILEGES: IMMUNITY

HB 2059 adds local behavioral health authorities to the list of providers of mental health first aid training who receive immunity when assisting an individual experiencing a mental health crisis. (See page 4.)

DH(LEGAL) EMPLOYEE STANDARDS OF CONDUCT

HB 4520 adds Penal Code 43.24 (sale, distribution, or display of harmful material to minor) to the qualifying felonies that render a person ineligible for a TRS service retirement annuity if convicted. (See item 4 on page 2.)

DI(LEGAL) EMPLOYEE WELFARE

HB 915 requires a district to post information for reporting workplace violence to the Department of Public Safety.

Other changes are to improve online accessibility of the policy.

DIA(LEGAL) EMPLOYEE WELFARE: FREEDOM FROM DISCRIMINATION, HARASSMENT, AND RETALIATION

Revisions to this legal policy incorporate recent state and federal legislative changes.

- HB 567 provides that the prohibition against racial discrimination includes discrimination based on an employee's hair texture or protective hairstyle commonly or historically associated with race. A district commits an unlawful employment practice if it adopts a dress or grooming policy that discriminates against such hair texture or protective hairstyle. (See page 4.)
- The federal Pregnant Workers Fairness Act, effective June 27, 2023, requires employers to provide reasonable accommodations to the known limitations related to the pregnancy, childbirth, or related medical conditions of a qualified employee. (See pages 9-11.)

Additional changes have been made to include citations to Administrative Code provisions and update other citations.

DL(LEGAL) WORK LOAD

HB 1605 allows supplemental agreements between a district and a classroom teacher related to lesson planning or selecting instructional material during planning and preparation time. This applies beginning with the 2024-25 school year.

Explanatory Notes

TASB Localized Policy Manual Update 122

Lovejoy ISD

DLB(LLEGAL)

WORK LOAD: REQUIRED PLANS AND REPORTS

HB 1605 allows a unit or weekly lesson plan included in instructional material adopted by the board to satisfy a requirement to prepare such a plan. (See item 6 at Restrictions on Written Reports.)

DMA(LLEGAL)

PROFESSIONAL DEVELOPMENT: REQUIRED STAFF DEVELOPMENT

Several legislative changes impact this legal policy on staff development.

- A district may satisfy a requirement to implement a program related to substance abuse and prevention and intervention by providing instruction related to fentanyl abuse prevention and drug poisoning awareness (see page 4). (HB 3908)
- A district must require all district employees who regularly interact with students to complete an evidence-based mental health training program (see pages 5-6). (HB 3)
- An athletic trainer who serves as a member of a district's concussion oversight team must take a course that meets the requirements set by the Texas Department of Licensing and Regulation (TDLR) (see page 9). (HB 2495)

Other revisions have been made to clarify the training requirements for other employees related to concussions.

DP(LLEGAL)

PERSONNEL POSITIONS

Revisions to this legal policy include new Administrative Code provisions, effective May 21, 2023, regarding school counselors, including requirements that they track time spent on various work duties and that the district assess its compliance with its counselor policy. (See pages 5-6.)

The policy also includes provisions from SB 763 authorizing a district to employ or accept as a volunteer a chaplain to provide support, services, and programs for students as assigned by the board. (See pages 8-9.)

DP(LOCAL)

PERSONNEL POSITIONS

SB 763 authorizes districts to employ chaplains or accept chaplains as volunteers to provide support, services, and programs for students as assigned by the board. These provisions apply beginning with the 2023-24 school year. While your district currently may allow chaplains along with other visitors or volunteers on campus, SB 763 requires each board to take a record vote not later than six months after the effective date, September 1, 2023, on whether to adopt a policy authorizing a campus to employ or accept as a volunteer a chaplain. To facilitate this record vote, TASB Policy Service sent a draft resolution with the [2023 Post-Legislative Policy Changes Policy Alert](#), available in the Policy Online® Governance and Management Library (TASB login required), for consideration by the board between September 1, 2023, and March 1, 2024. If the board approves the option to adopt a policy to authorize district campuses to employ or accept as a volunteer a chaplain, send your TASB policy consultant a copy of the resolution for TASB to update the district's DP(LOCAL) policy to reflect the board's decision. If the board would prefer only to accept chaplains as volunteers like other district or campus volunteers, contact your policy consultant for assistance with language at GKG(LOCAL).

EEB(LLEGAL)

INSTRUCTIONAL ARRANGEMENTS: CLASS SIZE

HB 2729 requires a district or an entity with which a district contracts to provide a prekindergarten program to attempt to maintain an average ratio of at least one *qualified*, rather than certified, teacher or aide for each 11 students. (See High-Quality Prekindergarten Program on page 1.)

Explanatory Notes

TASB Localized Policy Manual Update 122

Lovejoy ISD

EF(LEGAL) INSTRUCTIONAL RESOURCES

This legal policy includes the following revisions from HB 1605:

- Changes to timelines and other requirements related to parental review of tests and instructional materials
- New requirements pertaining to district instructional material review on request of a parent or group of parents

The district must adopt a process for a parent to request a district instructional material review. TEA must adopt standards for a district to use in this review. Policy Service will recommend local policy revisions following publication of the TEA standards.

Provisions related to parental rights regarding consent to surveys and information collection have been relocated to new policy FA(LEGAL), dedicated to parental rights.

EFA(LEGAL) INSTRUCTIONAL RESOURCES: INSTRUCTIONAL MATERIALS

Numerous revisions throughout this legal policy on instructional materials are the result of HB 1605.

- Expanded definition of "instructional materials"
- Revised provisions regarding the SBOE's review, selection, and approval or rejection of instructional materials
- New provisions related to TEA's instructional materials website and other support for districts
- New and revised provisions pertaining to open education resource (OER) instructional material

EFB(LEGAL) INSTRUCTIONAL RESOURCES: LIBRARY MATERIALS

HB 900 required revisions throughout this legal policy on library materials.

- A district must adhere to the standards for library collection development adopted by the Texas State Library and Archives Commission (TSLAC) with approval of the SBOE. TSLAC must develop standards by January 1, 2024; Policy Service will recommend local policy revisions following publication of the standards.
- Written parental consent is required before a student may check out library material rated by a vendor as "sexually relevant."
- A district must conduct a biennial review of library contents and post a report not later than January 1 of every odd-numbered year.
- Library material vendors may not sell library materials unless they have issued ratings regarding sexually explicit and sexually relevant material previously sold to the district. No sexually explicit material may be sold and any in use must be recalled. Vendors must submit a list to TEA of rated materials sold and in use, and TEA must post the list online.

EHAA(LEGAL) BASIC INSTRUCTIONAL PROGRAM: REQUIRED INSTRUCTION (ALL LEVELS)

HB 1605 requires districts, when adopting instructional materials, to ensure sufficient time for teachers to teach and students to learn the essential knowledge and skills for the subject and grade level. (See Scope and Sequence and Instructional Materials on page 3.)

HB 3908 expands the scope of instruction regarding the dangers of opioids about which the school health advisory council (SHAC) must make recommendations. (See item 7 on page 7.)

Explanatory Notes

TASB Localized Policy Manual Update 122

Lovejoy ISD

EHAB(LEGAL) BASIC INSTRUCTIONAL PROGRAM: REQUIRED INSTRUCTION (ELEMENTARY)

HB 1605 prohibits any instruction that incorporates three-cueing in the required phonics curriculum.

EHAC(LEGAL) BASIC INSTRUCTIONAL PROGRAM: REQUIRED INSTRUCTION (SECONDARY)

Several bills impact this legal policy on required secondary instruction.

- SB 2124 requires districts to develop an advanced mathematics program and automatically enroll certain sixth grade students unless the student's parent opts out. (See page 3.)
- HB 3908 requires a district to provide annual instruction regarding fentanyl abuse prevention and drug poisoning awareness to students in grades 6 through 12. (See page 7-8.)
- HB 4375 requires a district to provide instruction in using an automated external defibrillator (AED) to students in grades 7 through 12 and allows a district to accept donations to provide such instruction. (See pages 8-9.)

A reference to policy EHBAD has been added on page 9 for more information on new notice requirements regarding the driving with disability program from SB 2304.

EHB(LEGAL) CURRICULUM DESIGN: SPECIAL PROGRAMS

HB 3928 impacts this legal policy on special programs as follows:

- Further outlines the district's obligations when a student is suspected of having dyslexia or a related disorder (See pages 1-2.)
- Requires the board to adopt a local policy requiring the district to comply with all SBOE and commissioner rules, standards, and guidance related to implementing the program to test students for dyslexia and related disorders (See pages 2-3.)
- Requires the multidisciplinary evaluation team to include a dyslexia specialist when determining a student's eligibility for special education services (See page 3.)
- Implements requirements for progress reports for students receiving dyslexia services (See page 5.)
- Specifies required qualifications for providers of dyslexia instruction (See pages 5-6.)

EHB(LOCAL) CURRICULUM DESIGN: SPECIAL PROGRAMS

New provisions are recommended to comply with HB 3928, which requires the board to adopt and implement a policy requiring the district to comply with all rules and standards adopted by the SBOE and guidance published by the commissioner to implement the program to test students for dyslexia and related disorders.

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

This policy on identification, evaluation, and eligibility has been updated to include a reference on page 5 to policy EHB for more information on special education of students with dyslexia and related disorders.

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

Changes reflect revised Administrative Code provisions regarding the admission, review, and dismissal (ARD) committee, effective July 18, 2023. The revisions include requirements related to students new to a

Explanatory Notes

TASB Localized Policy Manual Update 122

Lovejoy ISD

district (see pages 4-6), including students who register in the summer, and requirements related to interpretation to ensure parent participation and understanding (see Collaborative Process on page 11).

EHBAD(LLEGAL) SPECIAL EDUCATION: TRANSITION SERVICES

SB 2304 requires a district to provide information regarding the Texas Driving with Disability Program to specified students. (See pages 3-4.)

EHBC(LLEGAL) SPECIAL PROGRAMS: COMPENSATORY SERVICES AND INTENSIVE PROGRAMS

The requirements for dropout recovery education programs are revised and supplemented by SB 1647. New provisions, beginning on page 6, address who can operate a program, when a district administrator or counselor may refer a student to a program, and reporting requirements.

EHBC(LOCAL) SPECIAL PROGRAMS: COMPENSATORY SERVICES AND INTENSIVE PROGRAMS

This local policy containing provisions on accelerated instruction has been moved to EHBCA(LOCAL) (see below) to align with the legal policy created at that code in Update 121.

EHBCA(LLEGAL) COMPENSATORY SERVICES AND INTENSIVE PROGRAMS: ACCELERATED INSTRUCTION

HB 1416 impacts this legal policy on accelerated instruction in numerous ways, including the following:

- Implements exceptions to accelerated instruction for certain students (See pages 1-2.)
- Modifies requirements for supplemental instruction, including requirements regarding the hours of instruction and the instructional group size (See page 3.)
- Provides parents an option to modify or remove a requirement for supplemental instruction for students who failed to perform satisfactorily on certain assessment instruments (See page 4.)
- Exempts a district from the requirement to provide transportation for students to accelerated instruction programs if the district does not operate or contract for a transportation system
- Expands the requirements to provide notice to parents and requires TEA to develop a [model notice](#) [TEA released [information](#) on July 13, 2023.]
- Requires a district to develop an accelerated education plan for a student who does not perform satisfactorily on an assessment instrument for two or more school years in the same subject (See pages 6-7.)
- Requires the district to make a good faith attempt to provide a parent conference for a student with an accelerated education plan
- Adds circumstances under which the commissioner may waive a district's accelerated instruction requirements (See pages 8-9.)
- Repeals several provisions, including provisions related to accelerated learning committees
- Amends the ARD committee meeting requirements

EHBCA(LOCAL) COMPENSATORY SERVICES AND INTENSIVE PROGRAMS: ACCELERATED INSTRUCTION

This local policy has been recoded from EHBC(LOCAL) to align with EHBCA(LLEGAL) created in Update 121. HB 1416 made several changes to the requirements for accelerated instruction. Recommended

Explanatory Notes

TASB Localized Policy Manual Update 122

Lovejoy ISD

changes to this local policy reflect that a parent's ability to request a particular teacher after a student fails to perform satisfactorily on a state assessment is no longer limited to students in grades 3, 5, and 8. Other changes delete references to the accelerated learning committee, which has been eliminated. A district now must develop an accelerated learning plan for certain students, and parents still may file a complaint about the plan in accordance with FNG.

EHBG(LLEGAL) SPECIAL PROGRAMS: PREKINDERGARTEN

HB 2729 makes several changes related to prekindergarten programs:

- Expands teacher qualifications (See page 5.)
- Requires a district or an entity with which a district contracts to provide a prekindergarten program to attempt to maintain an average ratio of at least one *qualified*, rather than certified, teacher or aide for each 11 students (See page 6.)
- Prescribes new supervisor requirements for entities with which a district contracts to provide a prekindergarten program (See page 6.)

EHBK(LLEGAL) SPECIAL PROGRAMS: OTHER INSTRUCTIONAL INITIATIVES

HB 3991 designates the first Friday in April as Texas Fruit and Vegetable Day and requires appropriate instruction. (See page 4.)

HB 3908 requires the governor to designate Fentanyl Poisoning Awareness Week, which may include age-appropriate instruction. (See page 7.)

EHDD(LLEGAL) ALTERNATIVE METHODS FOR EARNING CREDIT: COLLEGE COURSE WORK/DUAL CREDIT

HB 8 implements the Financial Aid for Swift Transfer (FAST) program to allow certain students to enroll at no cost in a dual credit course. A district must provide notice to parents about the program and determine student eligibility. (See pages 7-8.)

EHDE(LLEGAL) ALTERNATIVE METHODS FOR EARNING CREDIT: DISTANCE LEARNING

Provisions related to attendance calculation for off campus electronic instruction expired on September 1, 2023, and have been removed from this legal policy.

EHDF(LLEGAL) ALTERNATIVE METHODS FOR EARNING CREDIT: LOCAL REMOTE LEARNING PROGRAM

Provisions related to local remote learning programs expired on September 1, 2023. This legal policy has been deleted in its entirety.

EI(LLEGAL) ACADEMIC ACHIEVEMENT

Changes reflect new Administrative Code provisions regarding the academic achievement record of a student who earns a diploma for completing the Texas First Early High School Completion Program, effective June 15, 2023. (See page 4.)

EIA(LLEGAL) ACADEMIC ACHIEVEMENT: GRADING/PROGRESS REPORTS TO PARENTS

This policy on grading/progress reports to parents has been updated to include a reference on page 2 to policy EHB for more information on progress reports for students receiving dyslexia instruction.

Explanatory Notes

TASB Localized Policy Manual Update 122

Lovejoy ISD

EIC(LOCAL) ACADEMIC ACHIEVEMENT: CLASS RANKING

HB 3803 permits parents to elect to have their student repeat a high school course in which the student was enrolled during the previous school year unless the district determines the student has met all requirements for graduation. Absent local policy, TEA guidance provides that the original passing grade must be retained.

Contact your policy consultant for assistance with policy language that reflects the district's option regarding the use of grades from retaken courses in the calculation of class rank and on the transcript.

EIE(LEGAL) ACADEMIC ACHIEVEMENT: RETENTION AND PROMOTION

HB 3803 permits a parent to elect for a student to repeat the grade in which the student was enrolled in the previous school year up to grade 8. In addition, a parent may elect for a student to repeat a course taken for high school credit in the previous school year unless the district determines the student has met all requirements for graduation. (See page 1.)

EIF(LEGAL) ACADEMIC ACHIEVEMENT: GRADUATION

Provisions related to diplomas for certain students who entered ninth grade before the 2011-12 school year expired on September 1, 2023, and have been removed from this legal policy.

SB 2294 requires a district to allow a student to graduate and receive a diploma under the Texas First Early High School Completion Program if the student satisfies other requirements. (See page 7.)

EKB(LEGAL) TESTING PROGRAMS: STATE ASSESSMENT

This legal policy has been updated to include legislative changes regarding state assessments.

- In establishing the district's calendar and the dates for the administration of state assessment instruments, the board may consider religious holy days or periods of observance likely to be observed by students during the period for administering those instruments (see page 5). (HB 1883)
- A district may administer a state assessment instrument in paper format to up to three percent of students upon request of a student's parent, guardian, or teacher (see pages 6-7). (HB 1225)

F(LEGAL) STUDENTS

The Section F table of contents has been revised to add the new code FA, Parent Rights and Responsibilities. We have also added for future expansion a new code addressing identification of students at FI.

FA(LEGAL) PARENT RIGHTS AND RESPONSIBILITIES

Many of the legal provisions regarding parent rights have been moved to this new policy code so that information is available in a single location. In addition, this policy catalogs the other policy codes that address specific parents' rights throughout the policy manual.

FD(LEGAL) ADMISSIONS

SB 1008 extends the deadline for an active-duty military parent to provide proof of residence in the district from 10 to 90 days after arrival. (See pages 3-4.)

HB 3 requires a parent enrolling a child or the district the child most recently attended to provide the new district a copy of the child's disciplinary record and any threat assessment involving the child's behavior. (See page 8.)

Explanatory Notes

TASB Localized Policy Manual Update 122

Lovejoy ISD

FDA(LEGAL)

ADMISSIONS: INTERDISTRICT TRANSFERS

HB 3 requires a transfer student's district of residence to provide the receiving district with the student's disciplinary record and any threat assessment involving the student's behavior. (See page 1.)

HB 1959 and HB 2892 require the board to grant the request of a peace officer who is a parent of a student or a servicemember who is a parent of a student to transfer the student to another campus or to another district under an agreement between the districts under Education Code 25.035. (See pages 2-3.)

FDB(LEGAL)

ADMISSIONS: INTRADISTRICT TRANSFERS AND CLASSROOM ASSIGNMENTS

A reference to information regarding intradistrict transfers requested by a parent who is a servicemember or peace officer has been added to page 3 of this legal policy. The referenced information is located in FDA(LEGAL).

FEA(LEGAL)

ATTENDANCE: COMPULSORY ATTENDANCE

HB 1212 prohibits a district from requiring documentation from a clergy member or other religious leader and requires the district to accept a note from a parent when excusing a student's absence to observe a religious holy day. (See page 4.)

SB 68 allows a district to excuse a student from attending school for career investigation days to visit a professional's workplace during the student's junior and senior years to determine the student's interest in a career in the professional's field. (See page 6.)

HB 4559 increases the population threshold for constitutional county courts in certain counties to be designated as truancy courts. (See page 8.)

FEA(LOCAL)

ATTENDANCE: COMPULSORY ATTENDANCE

SB 68 allows a district to excuse a student from attending school for career investigation days to visit a professional's workplace during the student's junior and senior years to determine the student's interest in a career in the professional's field. Districts that choose to excuse students for absences to visit a professional's workplace to explore a career in that professional's field must adopt a policy to determine when an absence will be excused for this purpose and a procedure to verify the visit. A new provision offered for the board's consideration at Career Investigation permits such absences for the maximum amount allowed in law — up to two days during a student's junior year and up to two days during the student's senior year. Contact your policy consultant for revisions if the district will allow fewer excused absences or will not allow any excused absences for this purpose.

The [Legal Issues in Update 122](#) memo describes common legal concerns and best practices specific to this policy's topic.

FEB(LEGAL)

ATTENDANCE: ATTENDANCE ACCOUNTING

References regarding funding for courses taken with the Texas Virtual School Network have been updated.

FEC(LEGAL)

ATTENDANCE: ATTENDANCE FOR CREDIT

Provisions allowing a district to adopt a policy to exempt students from the 90 percent rule for courses offered under a local remote learning program exception expired on September 1, 2023, and have been removed from this legal policy.

Explanatory Notes

TASB Localized Policy Manual Update 122

Lovejoy ISD

FFED(LEGAL)

ATTENDANCE: ATTENDANCE ENFORCEMENT

HB 3917 allows a parent against whom a complaint for contributing to nonattendance has been filed to enter a written agreement to complete counseling, training, or another program designated by the district. (See page 10.)

FFAC(LEGAL)

WELLNESS AND HEALTH SERVICES: MEDICAL TREATMENT

SB 629 requires a district to adopt a policy regarding maintenance, administration, and disposal of opioid antagonists at each campus that serves students in grades 6 through 12; a district may adopt a policy at campuses serving students in grades below 6. Provisions have been added beginning on page 4 regarding reporting, training, immunity, and other topics.

General provisions related to the administration of opioid antagonists have been deleted in light of the new requirements.

SB 294 revises provisions related to a district's option to adopt a policy regarding maintenance, administration, and disposal of medication for respiratory distress. A district that adopts a policy must require each campus to have at least one authorized and trained person present during regular school hours. Provisions have been added beginning on page 11 regarding required referrals after medication is administered, training, reporting, parental notice of the policy, and other topics.

Also under SB 294, a district that implements a policy for the maintenance, administration, and disposal of epinephrine auto-injectors must give notice *of the policy* to parents before the policy is implemented or before the start of each school year. (See page 10.)

Finally, SB 294 prohibits disciplinary action against an employee or volunteer who refuses to administer or receive training to administer epinephrine auto-injectors or medication for respiratory distress in accordance with board policy. (See pages 13-14.)

FFAC(LOCAL)

WELLNESS AND HEALTH SERVICES: MEDICAL TREATMENT

Recommended revisions to this policy are based on SB 629, which requires a district to adopt a policy regarding maintenance, administration, and disposal of opioid antagonists at each campus that serves students in grades 6 through 12. Based on information recently received by the district, the revisions state that the provision will be applicable to every campus.

The [Legal Issues in Update 122](#) memo describes common legal concerns and best practices specific to this policy's topic.

Please note: As requested by the superintendent at the district's policy review session, text addressing the purchase of cough drops and volunteers administering epinephrine has been removed.

FFAF(LEGAL)

WELLNESS AND HEALTH SERVICES: CARE PLANS

SB 1506 requires a student's seizure management and treatment plan to be on a form adopted by TEA. TEA must adopt the form by December 1, 2023, and post the form on the TEA website. (See page 5.)

FFB(LEGAL)

STUDENT WELFARE: CRISIS INTERVENTION

The required policies and procedures for the district's threat assessment and safe and supportive school team are changed as follows (see pages 1-2):

- Under HB 3, the policy must require each campus to establish a procedure for students to report concerning behavior by another student.
- SB 1720 requires the policy to allow employees who report a potential threat to elect to keep their identities confidential.

Explanatory Notes

TASB Localized Policy Manual Update 122

Lovejoy ISD

Before the threat assessment and safe and supportive school team may conduct a threat assessment, HB 473 requires the team to notify a student's parent regarding the assessment. The team must also notify the parent of its findings and conclusions after the assessment.

HB 3 also requires that materials and information from a threat assessment be maintained in the student's school record until the student's 24th birthday.

FFB(LOCAL) STUDENT WELFARE: CRISIS INTERVENTION

Recommended revisions to this local policy on crisis intervention include the following:

- In accordance with HB 3, provisions have been added at Student Reports to require each campus to establish a clear procedure for students to report concerning behavior by another student.
- Revisions at Employee Confidentiality are based on SB 1720 and allow employees who report a potential threat to elect to keep their identities confidential.

FFBA(LEGAL) CRISIS INTERVENTION: TRAUMA-INFORMED CARE

This policy on trauma-informed care has been updated to include a reference to policy DMA for more information on mental health training for district employees.

FFEA(LEGAL) COUNSELING AND MENTAL HEALTH: COUNSELING

HB 1605 clarifies that materials required to be made available for parent review are those that are not available digitally through an instructional materials parent portal. (See page 1.)

HB 4363 requires that notice be given to students, teachers, counselors, and parents of Future Texas Teachers Scholarship programs. (See page 3.)

FFG(LEGAL) STUDENT WELFARE: CHILD ABUSE AND NEGLECT

HB 63 prohibits the Department of Family and Protective Services from taking anonymous reports of abuse or neglect. Revisions have been made to the required contents of a report, including the name and contact information of the person making the report. (See page 3.) Other provisions have been rearranged for clarity.

FL(LEGAL) STUDENT RECORDS

Information regarding enrollment records has been deleted from this policy to avoid unnecessary duplication of the same information in policy FD. A reference to that policy has been added on page 4.

The following provisions have been relocated to new policy FA(LEGAL) dedicated to parental rights:

- Parental rights regarding consent to surveys and information collection.
- Parental consent requirements related to videotaping or recording students.

FL(LOCAL) STUDENT RECORDS

HB 1416 repeals provisions related to accelerated learning committees. The references to the accelerated learning committee have been replaced with references to the accelerated education plan that now must be created for certain students who fail to perform satisfactorily on state assessments.

The [Legal Issues in Update 122](#) memo describes common legal concerns and best practices specific to this policy's topic.

Please note: As requested by the superintendent at the district's policy review session, text on directory information at All Other Purposes has been revised.

Explanatory Notes

TASB Localized Policy Manual Update 122

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FM(LEGAL)

STUDENT ACTIVITIES

HB 1002 allows a licensed chiropractor or physical therapist to serve on the concussion oversight team if the person meets the training requirements. (See pages 4-5.) This bill also allows a physical therapist to remove a student from practice or competition if the physical therapist believes the student has sustained a concussion. (See page 5.)

HB 2484 requires a district to provide a peace officer, SRO, administrator, or security personnel at an athletic event on district property to ensure the safety of an official of the activity under certain circumstances. (See page 8.) This bill also requires a district to prohibit a spectator from attending athletic activities for at least a year if the spectator causes bodily injury to an official because of the official's actions. (See page 18.)

HB 59 implements new requirements for organized water activities including parental affirmation of whether a child can swim and provision of flotation devices for children who cannot swim. (See pages 9-10.)

HB 699 requires UIL, in assigning league classification, to use the same student enrollment calculation formula for a school that allows homeschooled students to participate in UIL activities as for one that does not. (See pages 15-16.)

HB 3708 provides an allotment of \$1,500 for each UIL activity in which a district allows a homeschooled student to participate. (See page 16.)

An existing provision that a nurse or health-care professional who is not in compliance with training requirements may not serve on a concussion oversight team has been relocated from GKG. (See page 5.)

FNCA(LEGAL)

STUDENT CONDUCT: DRESS CODE

HB 567 prohibits a student dress or grooming policy, including an extracurricular dress code, that discriminates against a hair texture or protective hairstyle commonly or historically associated with race. In light of this new Education Code provision, citations to older caselaw have been deleted.

FNCC(LEGAL)

STUDENT CONDUCT: PROHIBITED ORGANIZATIONS AND HAZING

SB 1900 expands the offense of coercing, inducing, or soliciting membership in a criminal street gang to include a foreign terrorist organization. (See page 1.)

SB 37 allows a report of hazing to be made to a peace officer or law enforcement agency. Provisions regarding immunity for reporting hazing have been added to this legal policy. (See page 2.)

FNCD(LEGAL)

STUDENT CONDUCT: TOBACCO USE AND POSSESSION

This legal policy on tobacco use and possession has been updated to include a reference to policy FOC regarding the new disciplinary consequences for conduct involving e-cigarettes.

FNCF(LEGAL)

STUDENT CONDUCT: ALCOHOL AND DRUG USE

This legal policy has been updated on page 1 to increase the population threshold for certain districts to petition for an alcohol-free zone. (HB 4559)

FNCG(LEGAL)

STUDENT CONDUCT: WEAPONS

HB 114 clarifies that the procedural requirements of Education Code 37.009(a) regarding conference and mitigating factors apply to expulsion. (See Possession of Weapons on page 1.)

Explanatory Notes
TASB Localized Policy Manual Update 122

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

Provisions outlining parental rights have been relocated to new policy FA(LEGAL) dedicated to parent rights.

FO(LEGAL) STUDENT DISCIPLINE

A district peace officer or security personnel may not restrain or use a chemical irritant or Taser on a student in fifth grade or below unless the student poses a serious risk of harm (see page 6). (SB 133)

FOC(LEGAL) STUDENT DISCIPLINE: PLACEMENT IN A DISCIPLINARY ALTERNATIVE EDUCATION SETTING

Several bills impact this legal policy regarding placement in a DAEP.

- HB 114:
- Clarifies that the procedural requirements of Education Code 37.009(a) regarding conference and mitigating factors apply to placement in a DAEP (see page 1).
- Requires DAEP placement for certain conduct involving e-cigarettes (see item 5 on page 2).
- Allows placement in in-school suspension of students who engaged in certain conduct when DAEP is at capacity (see page 9).
- HB 2187 expands the Title V felony offense of abandoning or endangering a child to include elderly or disabled individuals. (See item 25 on page 4.)
- HB 3928 requires the district, upon placement of a student in DAEP, to provide information to the parent about the process to request an evaluation of the student for special education services. (See page 8.)

FOCA(LEGAL) PLACEMENT IN A DISCIPLINARY ALTERNATIVE EDUCATION SETTING: DISCIPLINARY ALTERNATIVE EDUCATION PROGRAM OPERATIONS

HB 114 allows a program of educational and support services to be provided to a student and the student's parents when a DAEP offense involves e-cigarettes. (See page 5.)

HB 3928 requires the personalized transition plan for a student exiting a DAEP to include the provision of information to the parent about the process to request an evaluation of the student for special education services. (See pages 6-7.)

FOD(LEGAL) STUDENT DISCIPLINE: EXPULSION

HB 114 clarifies that the procedural requirements of Education Code 37.009(a) regarding conference and mitigating factors apply to expulsion. For ease of reference, content related to pre-placement proceedings has been duplicated in this policy. (See page 6.)

This legal policy also has been updated to increase the population threshold for certain counties considered to be a county with a population of 125,000 or less for purposes of JJAEP requirements (see page 10). (HB 4559)

Explanatory Notes

TASB Localized Policy Manual Update 122

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FODA(LLEGAL)

EXPULSION: JUVENILE JUSTICE ALTERNATIVE EDUCATION PROGRAM

This legal policy has been updated to increase population thresholds for certain counties considered to be a county with a population of 125,000 or less for purposes of JJAEP requirements. (See pages 1-2.) (HB 4559)

GBA(LLEGAL)

PUBLIC INFORMATION PROGRAM: ACCESS TO PUBLIC INFORMATION

Several legislative changes affect this legal policy on access to public information.

- HB 1161 adds victims of child abduction to those covered by the address confidentiality program. (See page 10.)
- HB 3130 restricts the release of information about certain persons who hold or apply for a license issued by the district. (See page 12.)
- HB 4123 prohibits the release of criminal history record information (CHRI) obtained from the FBI and limits the release of CHRI obtained from other Texas criminal justice agencies. (See page 12.)
- HB 3033 provides that the litigation exception to disclosure does not apply to election information in the possession of the entity that administers elections. (See page 16.)
- HB 30 and HB 3033 address the release of information related to certain arrests and crimes. (See page 17.)

GBAA(LLEGAL)

ACCESS TO PUBLIC INFORMATION: REQUESTS FOR INFORMATION

Numerous revisions throughout this legal policy on requests for information are the result of HB 3033, including the following:

- The attorney general (AG) may require board members and the officer for public information to complete Public Information Act (PIA) training if the AG determines the district has failed to comply with a requirement of the PIA. (See page 4.)
- "Business day" is defined. A board may designate 10 nonbusiness days each calendar year. (See page 7.)
- With limited exceptions, a district must submit a request for an AG decision through the AG's electronic filing system. (See page 14.)
- A district must take certain actions as soon as practicable after receiving an AG decision. (See pages 20-21.)
- A district may request photo identification from a requestor to establish the requestor has not exceeded a personnel time limit and concealed the requestor's identity. A requestor may decline to provide identification and pay a charge for exceeding the time limit. (See page 30.)

The list of state and national holidays has been added on page 8.

GC(LLEGAL)

PUBLIC NOTICES

This legal policy has been updated to increase the population threshold for the selection of the newspaper for publication of notice in certain counties (see page 2). (HB 4559)

Explanatory Notes
TASB Localized Policy Manual Update 122

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GKA(LLEGAL) COMMUNITY RELATIONS: CONDUCT ON SCHOOL PREMISES

HB 1760 modifies the Penal Code regarding places where weapons are prohibited to require that grounds on which a school-sponsored activity is occurring be owned by and under the control of a school. (See page 7.)

GKC(LLEGAL) COMMUNITY RELATIONS: VISITORS

HB 3 allows a district to eject a person on district property who fails or refuses to provide identification on request if the person reasonably appears to have no legitimate reason to be on district property.

GKG(LLEGAL) COMMUNITY RELATIONS: SCHOOL VOLUNTEER PROGRAM

HB 4123 allows a district to obtain criminal history record information (CHRI) from the Department of Public Safety, in addition to other agencies, about a volunteer who is excepted from the required CHRI check but subject to a discretionary check by the district. (See page 2.)

Provisions related to the concussion oversight team have been relocated to FM(LLEGAL).

GRAC(LLEGAL) STATE AND LOCAL GOVERNMENTAL AUTHORITIES: JUVENILE SERVICE PROVIDERS

HB 446 changed terminology used in statutes to refer to intellectual disability. (See item 8 on page 2.)

GRB(LLEGAL) RELATIONS WITH GOVERNMENTAL ENTITIES: INTERLOCAL COOPERATION CONTRACTS

This policy has been updated to increase the population threshold for municipalities to contract with one or more school districts to provide school crossing guards. (HB 4559)



(LOCAL) Policies Packet

For your convenience, this file contains *only* **the** local policies from your school district's TASB update packet.

What is in this packet?

- Instruction sheet for recommended (LOCAL) policies
- Explanatory Notes for recommended (LOCAL) policies
- Clean copies of recommended (LOCAL) policies
- Annotated (redlined) copies of recommended (LOCAL) policy changes

This is not the full update packet.

To retrieve your district's full update packet, log in to Policy Online® and visit My Policy Manual > Local Manual Updates > Numbered Updates.

What is in the full update packet?

The full update packet contains:

- A summary of the overall policy update
- (LEGAL) policies and (EXHIBIT) documents that describe the statutory framework in which your local policies must operate
- Instructions and Explanatory Notes for every policy change, not just the (LOCAL) policies
- Guidance on how to:
 - Present recommended policy changes to the board
 - Keep minutes
 - Notify TASB of board action
 - Maintain your historical record
 - Update your administrative regulations

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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.

Instruction Sheet

TASB Localized Policy Manual Update 122

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Code	Type	Action To Be Taken	Note
ATTN	(NOTE)	No policy enclosed	See explanatory note
CQB	(LOCAL)	Replace policy	Revised policy
CSA	(LOCAL)	ADD policy	See explanatory note
DC	(LOCAL)	Replace policy	Revised policy
DP	(LOCAL)	No policy enclosed	See explanatory note
EHB	(LOCAL)	Replace policy	Revised policy
EHBC	(LOCAL)	DELETE policy	See explanatory note
EHBCA	(LOCAL)	ADD policy	See explanatory note
EIC	(LOCAL)	No policy enclosed	See explanatory note
FEA	(LOCAL)	Replace policy	Revised policy
FFAC	(LOCAL)	Replace policy	Revised policy
FFB	(LOCAL)	Replace policy	Revised policy
FL	(LOCAL)	Replace policy	Revised policy

Explanatory Notes

TASB Localized Policy Manual Update 122

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ATTN(NOTE)

GENERAL INFORMATION ABOUT THIS UPDATE

Please note:

Changes at Update 122 are based almost exclusively on legislation from the 88th Regular Legislative Session.

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

Each regular legislative session, legislation is passed that makes nonsubstantive additions, revisions, or corrections to existing statutes. HB 4595 was passed for this purpose in the 88th Regular Legislative Session. Minor nonsubstantive changes throughout Update 122 result from HB 4595 and are not otherwise mentioned in the explanatory notes.

For more information about the bills mentioned throughout and other changes from the 88th Legislative Session, download the free [2023 Legislative Summary for TASB Members](#) PDF from the TASB store.

The *Local Policy Overview* for Update 122, available with your Update 122 materials under [Local Manual Updates](#) on Policy Online® (TASB login required), provides a general, high-level overview of the changes to the local policies included in the update. **Legal policies provide the legal framework for key areas of district operations and are not adopted by the board.**

Changes to the policy manual based on bills from the special called sessions will be included in Update 123.

QCB(LOCAL)

TECHNOLOGY RESOURCES: CYBERSECURITY

Based on the new notification requirements imposed by SB 271, the security breach notification provisions have been revised to include security incidents.

CSA(LOCAL)

FACILITY STANDARDS: SAFETY AND SECURITY

This new local policy on facility safety and security includes recommended provisions addressing audits of building access control to comply with the commissioner's new school safety rules for facilities, effective May 31, 2023.

DC(LOCAL)

EMPLOYMENT PRACTICES

HB 1789 creates a nepotism exception for hiring bus drivers, regardless of county population, if the *board* approves employment. We recommend adding a note referring to DBE(LEGAL) (concerning nepotism) to this policy that delegates hiring authority for noncontractual employees to the superintendent as a reminder of the special requirements related to this nepotism exception for bus drivers.

The [Legal Issues in Update 122](#) memo describes common legal concerns and best practices specific to this policy's topic.

Please note: The text at Employment of Contractual Personnel has been lightly edited and reordered for clarity and consistency with policy style.

DP(LOCAL)

PERSONNEL POSITIONS

SB 763 authorizes districts to employ chaplains or accept chaplains as volunteers to provide support, services, and programs for students as assigned by the board. These provisions apply beginning with the 2023-24 school year. While your district currently may allow chaplains along with other visitors or volunteers on campus, SB 763 requires each board to take a record vote not later than six months after the effective date, September 1, 2023, on whether to adopt a policy authorizing a campus to employ or accept

Explanatory Notes

TASB Localized Policy Manual Update 122

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as a volunteer a chaplain. To facilitate this record vote, TASB Policy Service sent a draft resolution with the [2023 Post-Legislative Policy Changes Policy Alert](#), available in the Policy Online® Governance and Management Library (TASB login required), for consideration by the board between September 1, 2023, and March 1, 2024. If the board approves the option to adopt a policy to authorize district campuses to employ or accept as a volunteer a chaplain, send your TASB policy consultant a copy of the resolution for TASB to update the district's DP(LOCAL) policy to reflect the board's decision. If the board would prefer only to accept chaplains as volunteers like other district or campus volunteers, contact your policy consultant for assistance with language at GKG(LOCAL).

EHB(LOCAL) CURRICULUM DESIGN: SPECIAL PROGRAMS

New provisions are recommended to comply with HB 3928, which requires the board to adopt and implement a policy requiring the district to comply with all rules and standards adopted by the SBOE and guidance published by the commissioner to implement the program to test students for dyslexia and related disorders.

EHBC(LOCAL) SPECIAL PROGRAMS: COMPENSATORY SERVICES AND INTENSIVE PROGRAMS

This local policy containing provisions on accelerated instruction has been moved to EHBCA(LOCAL) (see below) to align with the legal policy created at that code in Update 121.

EHBCA(LOCAL) COMPENSATORY SERVICES AND INTENSIVE PROGRAMS: ACCELERATED INSTRUCTION

This local policy has been recoded from EHBC(LOCAL) to align with EHBCA(LEGAL) created in Update 121. HB 1416 made several changes to the requirements for accelerated instruction. Recommended changes to this local policy reflect that a parent's ability to request a particular teacher after a student fails to perform satisfactorily on a state assessment is no longer limited to students in grades 3, 5, and 8. Other changes delete references to the accelerated learning committee, which has been eliminated. A district now must develop an accelerated learning plan for certain students, and parents still may file a complaint about the plan in accordance with FNG.

EIC(LOCAL) ACADEMIC ACHIEVEMENT: CLASS RANKING

HB 3803 permits parents to elect to have their student repeat a high school course in which the student was enrolled during the previous school year unless the district determines the student has met all requirements for graduation. Absent local policy, TEA guidance provides that the original passing grade must be retained.

Contact your policy consultant for assistance with policy language that reflects the district's option regarding the use of grades from retaken courses in the calculation of class rank and on the transcript.

FEA(LOCAL) ATTENDANCE: COMPULSORY ATTENDANCE

SB 68 allows a district to excuse a student from attending school for career investigation days to visit a professional's workplace during the student's junior and senior years to determine the student's interest in a career in the professional's field. Districts that choose to excuse students for absences to visit a professional's workplace to explore a career in that professional's field must adopt a policy to determine when an absence will be excused for this purpose and a procedure to verify the visit. A new provision offered for the board's consideration at Career Investigation permits such absences for the maximum amount allowed in law — up to two days during a student's junior year and up to two days during the student's senior year. Contact your policy consultant for revisions if the district will allow fewer excused absences or will not allow any excused absences for this purpose.

Explanatory Notes

TASB Localized Policy Manual Update 122

Lovejoy ISD

The [Legal Issues in Update 122](#) memo describes common legal concerns and best practices specific to this policy's topic.

FFAC(LOCAL) WELLNESS AND HEALTH SERVICES: MEDICAL TREATMENT

Recommended revisions to this policy are based on SB 629, which requires a district to adopt a policy regarding maintenance, administration, and disposal of opioid antagonists at each campus that serves students in grades 6 through 12. Based on information recently received by the district, the revisions state that the provision will be applicable to every campus.

The [Legal Issues in Update 122](#) memo describes common legal concerns and best practices specific to this policy's topic.

Please note: As requested by the superintendent at the district's policy review session, text addressing the purchase of cough drops and volunteers administering epinephrine has been removed.

FFB(LOCAL) STUDENT WELFARE: CRISIS INTERVENTION

Recommended revisions to this local policy on crisis intervention include the following:

- In accordance with HB 3, provisions have been added at Student Reports to require each campus to establish a clear procedure for students to report concerning behavior by another student.
- Revisions at Employee Confidentiality are based on SB 1720 and allow employees who report a potential threat to elect to keep their identities confidential.

FL(LOCAL) STUDENT RECORDS

HB 1416 repeals provisions related to accelerated learning committees. The references to the accelerated learning committee have been replaced with references to the accelerated education plan that now must be created for certain students who fail to perform satisfactorily on state assessments.

The [Legal Issues in Update 122](#) memo describes common legal concerns and best practices specific to this policy's topic.

Please note: As requested by the superintendent at the district's policy review session, text on directory information at All Other Purposes has been revised.

- Plan** The District shall develop a cybersecurity plan to secure the District's cyberinfrastructure against a cyberattack or any other cyber- security incidents, determine cybersecurity risk, and implement ap- propriate mitigation planning.
- Coordinator** The Superintendent shall designate a cybersecurity coordinator. The cybersecurity coordinator shall serve as the liaison between the District and the Texas Education Agency in cybersecurity matters.
- Training** The Board delegates to the Superintendent the authority to:
1. Determine the cybersecurity training program to be used in the District;
 2. Verify and report compliance with training requirements in accordance with guidance from the Department of Information Resources; and
 3. Remove access to the District's computer systems and data-bases for noncompliance with training requirements as appropriate.
- The District shall complete periodic audits to ensure compliance with the cybersecurity training requirements.
- Security Breach Notifications** Upon discovering or receiving notification of a breach of system security or a security incident, as defined by law, the District shall dis- close the breach or incident to affected persons or entities in accordance with the time frames established by law. The District shall give notice by using one or more of the following methods:
1. Written notice.
 2. Email, if the District has email addresses for the affected persons.
 3. Conspicuous posting on the District's websites.
 4. Publication through broadcast media.
- The District shall disclose a breach or incident involving sensitive, protected, or confidential student information as required by law.

**Building Access
Control**

Audits of building access control shall include weekly inspections of instructional facilities during school hours to certify all exterior doors are, by default, set to closed, latched, and locked status and cannot be opened from the outside without a key.

The Superintendent shall ensure that the findings of the weekly inspections are:

1. Reported to the District safety and security committee; and
2. Reported to the campus principal or lead administrator of the instructional facility to ensure awareness of any deficiencies identified.

The campus principal or lead administrator shall assign appropriate staff to take action to reduce the likelihood of similar deficiencies in the future.

The results of the weekly reports shall be kept for review as part of the required safety and security audit.

The District's building access control procedures shall not be interpreted as discouraging parents or guardians who have been properly verified as authorized visitors from visiting their student's campus. [See GKC]

Personnel Duties	The Superintendent shall define the qualifications, duties, and responsibilities of all positions and shall ensure that job descriptions are current and accessible to employees and supervisors.
Posting Vacancies	The Superintendent or designee shall establish guidelines for advertising employment opportunities and posting notices of vacancies. These guidelines shall advance the Board's commitment to equal opportunity employment and to recruiting well-qualified candidates. Current District employees may apply for any vacancy for which they have appropriate qualifications.
Applications	All applicants shall complete the application form supplied by the District. Information on applications shall be confirmed before a contract is offered for a contractual position and before hiring or as soon as possible thereafter for a noncontractual position. [For information related to the evaluation of criminal history records, see DBAA.]
Employment of Contractual Personnel	The Superintendent has sole authority to make recommendations to the Board regarding the selection of contractual personnel in a position above principal. The Board delegates to the Superintendent final authority to employ contractual personnel in a position of principal or below. The Board retains final authority for employment of contractual personnel in a position above principal; however, from March 1 to August 31, the Board delegates to the Superintendent final authority to employ all contractual personnel. The Superintendent shall inform the Board of any persons hired under this authority. [See DCA, DCB, DCC, and DCE as appropriate]
Employment of Noncontractual Personnel	<hr/> Note: For employment of a bus driver related to a Board member or the Superintendent, see DBE(LEGAL). <hr/>
Employment Assistance Prohibited	The Board delegates to the Superintendent final authority to employ and dismiss noncontractual employees on an at-will basis. [See DCD] No District employee shall assist another employee of the District or of any school district in obtaining a new job if the employee knows, or has probable cause to believe, that the other employee engaged in sexual misconduct regarding a minor or student in violation of the law. Routine transmission of an administrative or personnel file does not violate this prohibition. [See CJ for prohibitions relating to contractors and agents and DH(EXHIBIT) for the Educators' Code of Ethics.]

Dyslexia and Related Disorders

The District shall comply with all rules and standards adopted by the State Board of Education and guidance published by the commissioner of education to implement the program to test students for dyslexia and related disorders.

In accordance with administrative procedures, the District shall provide regular training opportunities for teachers of students with dyslexia that include new research and practices for educating students with dyslexia.

COMPENSATORY SERVICES AND INTENSIVE PROGRAMS
ACCELERATED INSTRUCTION

EHBCA
(LOCAL)

Each student who has been identified as being at risk of dropping out of school, who is not performing at grade level, or who did not perform satisfactorily on a state-mandated assessment shall be provided accelerated and/or compensatory educational services.

**Accelerated
Instruction**

The District shall provide accelerated instruction in accordance with law if a student fails to perform satisfactorily on a state-mandated assessment.

Parent Request

If a student fails to perform satisfactorily on a state-mandated assessment, a parent's request that the student be assigned to a particular teacher the following school year shall be addressed in accordance with the District's administrative procedures.

**Accelerated
Education Plan**

Appropriate District staff shall develop an accelerated education plan for a student who fails to perform satisfactorily on the same state-mandated assessment for two or more consecutive years.

A parent complaint about the content or implementation of the accelerated education plan shall be filed in accordance with FNG.

Students in violation of the compulsory attendance law shall be reported to the District attendance officer, who may institute court action as provided by law.

Excused Absences

In addition to excused absences required by law, the District shall excuse absences for the following purposes. A student shall be required to submit verification of these absences in accordance with administrative regulations.

Higher Education Visits

The District shall excuse a student for up to two days during the student's junior year and up to two days during the student's senior year to visit an accredited institution of higher education.

Career Investigation

The District shall excuse a student for up to two days during the student's junior year and up to two days during the student's senior year to visit a professional's workplace for purposes of exploring the student's interest in pursuing a career in that professional's field.

Armed Services Enlistment

The District shall excuse a student 17 years of age or older for up to four days during his or her enrollment in high school for activities related to pursuing enlistment in a branch of the U.S. Armed Services or Texas National Guard.

Early Voting or Election Clerk

The District shall excuse a student for up to two days per school year to serve as an early voting or election clerk.

Learner or Driver's License

The District shall excuse a student 15 years of age or older for one day during his or her enrollment in high school for each of the following:

- Visiting a driver's license office to obtain a learner license; or
- Visiting a driver's license office to obtain a driver's license.

[For extracurricular activity absences, see FM.]

Withdrawal for Nonattendance

The District may initiate withdrawal of a student under the age of 19 for nonattendance under the following conditions:

1. The student has been absent 10 consecutive school days; and
2. Repeated efforts by the attendance officer and/or principal to locate the student have been unsuccessful.

[For District-initiated withdrawal of students 19 or older, see FEA(LEGAL).]

Students Attending Homeschools

Students who are homeschooled are exempt from the compulsory attendance law to the same extent as students enrolled in other private schools.

Adequate documentation of homeschooling for withdrawal shall consist of either a statement of withdrawal in accordance with FD(LOCAL) indicating the date homeschooling began, or a signed and dated letter from a parent or guardian indicating that his or her child is being homeschooled and the date the homeschooling began.

The District may request from a parent or guardian a letter of assurance that a child is being educated using a curriculum designed to meet basic education goals of reading, spelling, grammar, mathematics, and a study of good citizenship.

Enforcing
Compulsory
Attendance

If a parent or guardian refuses to submit a requested statement or letter, or if the District has evidence that a school-aged child is not being homeschooled within legal requirements, the District may investigate further and, if warranted, shall pursue legal action to enforce the compulsory attendance law.

No employee shall give any student prescription medication, non-prescription medication, herbal substances, anabolic steroids, or dietary supplements of any type, except as authorized by this or other District policy.

**Medication Provided
by Parent**

The Superintendent shall designate the employees who are authorized to administer medication that has been provided by a student's parent. An authorized employee is permitted to administer the following medication in accordance with administrative regulations:

1. Prescription medication in accordance with legal requirements.
2. Nonprescription medication, upon a parent's written request, when properly labeled and in the original container.
3. Herbal substances or dietary supplements provided by the parent and only if required by the individualized education program or Section 504 plan for a student with disabilities.

**Medication Provided
by District**

Except as required by law and provided in this policy, the District shall not purchase medication to administer to a student.

First-Aid

The District shall purchase certain topical nonprescription medications for use when administering first aid to students in accordance with administrative regulations.

The Superintendent shall designate the employees who are authorized to administer nonprescription medication under this provision.

Athletic Program

The District shall purchase nonprescription medication that may be used to prevent or treat illness or injury in the District's athletic program. Only a licensed athletic trainer or a physician licensed to practice medicine in the state of Texas may administer this medication and may do so only if:

1. The District has prior written consent for medication to be administered [see Medical Treatment, below]; and
2. The administration of a medication by an athletic trainer is in accordance with a standing order or procedures approved by a physician licensed to practice medicine in the state of Texas.

Epinephrine

The District authorizes school personnel who have agreed in writing and been adequately trained to administer an unassigned epinephrine auto-injector in accordance with law and this policy. Administration of epinephrine shall only be permitted when an

authorized and trained individual reasonably believes a person is experiencing anaphylaxis.

On Campus

Authorized and trained individuals may administer an unassigned epinephrine auto-injector at any time to a person experiencing anaphylaxis on a school campus.

The District shall ensure that at each campus a sufficient number of authorized individuals are trained to administer epinephrine so that at least one trained individual is present on campus during all hours the campus is open. In accordance with state rules, the campus shall be considered open for this purpose during regular on-campus school hours and whenever school personnel are physically on site for school-sponsored activities.

Off Campus

Authorized and trained individuals may administer an unassigned epinephrine auto-injector to a person experiencing anaphylaxis at an off-campus school event or while in transit to or from a school event when an unassigned epinephrine auto-injector is available.

Maintenance,
Availability, and
Training

The Superintendent shall develop administrative regulations designating a coordinator to manage policy implementation and addressing annual training of authorized individuals in accordance with law; procedures for auto-injector use; and acquisition or purchase, maintenance, expiration, disposal, availability of unassigned epinephrine auto-injectors at each campus, at off-campus events, and while in transit to and from a school event.

Notice to Parents

In accordance with law, the District shall provide notice of the policy to parents regarding the epinephrine program, including notice of any change to or discontinuation of this program.

Opioid Antagonist

On Campus

This provision shall be applicable to every campus.

The District authorizes school personnel who have been adequately trained to administer an opioid antagonist in accordance with law and this policy. Administration of an opioid antagonist shall only be permitted when an authorized and trained individual reasonably believes a person is experiencing an opioid-related over-dose.

Each applicable campus shall have at least one individual who is authorized and trained to administer an opioid antagonist present during regular school hours.

*Maintenance,
Availability,
Training, and
Reporting*

Each applicable campus shall have at least two unused, unexpired opioid antagonist doses available.

All opioid antagonists shall be stored in a secure location and shall be easily accessible by individuals who are authorized and trained to administer an opioid antagonist.

The Superintendent shall develop administrative regulations addressing acquisition, maintenance, expiration, and disposal of opioid antagonists in the District, as well as reporting, employee training, and emergency notification requirements.

Psychotropics

Except as permitted by law, an employee shall not:

1. Recommend to a student or a parent that the student use a psychotropic drug;
2. Suggest a particular diagnosis; or
3. Exclude the student from a class or a school-related activity because of the parent's refusal to consent to psychiatric evaluation or examination or treatment of the student.

Medical Treatment

A student's parent, legal guardian, or other person having lawful control shall annually complete and sign a form that provides emergency information and addresses authorization regarding medical treatment. A student who has reached age 18 shall be permitted to complete this form.

The District shall seek appropriate emergency care for a student as required or deemed necessary.

**Threat Assessment
and Safe and
Supportive Team**

In compliance with law, the Superintendent shall ensure that a multidisciplinary threat assessment and safe and supportive team is established to serve each campus. The Superintendent shall appoint team members. The team shall be responsible for developing and implementing a safe and supportive school program at each campus served by the team and shall support the District in implementing its multi-hazard emergency operations plan.

Training

Each team shall complete training provided by an approved provider on evidence-based threat assessment programs.

Student Reports

Each campus shall establish a clear procedure for a student to report concerning behavior exhibited by another student for assessment by the team or other appropriate District employee.

Employee
Confidentiality

A District employee who reports a potential threat may elect for the employee's identity to remain confidential and not be subject to disclosure under the state's public information law. The employee's identity shall only be revealed when necessary for the team, the District, or law enforcement to investigate the reported threat.

The District shall maintain a record of the identity of a District employee who elects for the employee's identity to remain confidential.

Imminent Threats or
Emergencies

A member of the team or any District employee may act immediately to prevent an imminent threat or respond to an emergency, including contacting law enforcement directly.

Threat Assessment
Process

The District shall develop procedures as recommended by the Texas School Safety Center. In accordance with those procedures, the threat assessment and safe and supportive team shall conduct threat assessments using a process that includes:

1. Identifying individuals, based on referrals, tips, or observations, whose behavior has raised concerns due to threats of violence or exhibition of behavior that is harmful, threatening, or violent.
2. Conducting an individualized assessment based on reasonably available information to determine whether the individual poses a threat of violence or poses a risk of harm to self or others and the level of risk.
3. Implementing appropriate intervention and monitoring strategies, if the team determines an individual poses a threat of harm to self or others. These strategies may include referral of a student for a mental health assessment and escalation procedures as appropriate.

For a student or other individual the team determines poses a serious risk of violence to self or others, the team shall immediately report to the Superintendent, who shall immediately attempt to contact the student's parent or guardian. Additionally, the Superintendent shall coordinate with law enforcement authorities as necessary and take other appropriate action in accordance with the District's multihazard emergency operations plan.

For a student the team identifies as at risk of suicide, the team shall follow the District's suicide prevention program.

For a student the team identifies as having a substance abuse issue, the team shall follow the District's substance abuse program.

For a student whose conduct may constitute a violation of the District's Student Code of Conduct, the team shall make a referral to the campus behavior coordinator or other appropriate administrator to consider disciplinary action.

As appropriate, the team may refer a student:

1. To a local mental health authority or health-care provider for evaluation or treatment; or
2. For a full individualized and initial evaluation for special education services.

The team shall not provide any mental health-care services, except as permitted by law.

Guidance to School
Community

The team shall provide guidance to students and District employees on recognizing harmful, threatening, or violent behavior that may pose a threat to another person, the campus, or the community and methods to report such behavior to the team, including through anonymous reporting.

Reports

The team shall provide reports to the Texas Education Agency as required by law.

STUDENT RECORDS

FL
(LOCAL)

Comprehensive System

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

Cumulative Record

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

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

Custodian of Records

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

Types of Education Records

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

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

STUDENT RECORDS

FL
(LOCAL)

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

Access by Parents

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

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

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

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

Access by School Officials

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

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

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

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

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

1. Working with the student;
2. Considering disciplinary or academic actions, the student's case, or an individualized education program for a student with disabilities;
3. Compiling statistical data;
4. Reviewing an education record to fulfill the official's professional responsibility; or
5. Investigating or evaluating programs.

Transcripts and Transfers of Records

The District may request transcripts from previously attended schools for students transferring into District schools; however, the

ultimate responsibility for obtaining transcripts from sending schools rests with the parent or student, if 18 or older.

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

**Records
Responsibility for
Students in Special
Education**

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

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

**Procedure to Amend
Records**

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

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

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

**Directory
Information**

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

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

STUDENT RECORDS

FL
(LOCAL)

School-Sponsored
Purposes

For the following school-sponsored purposes — all District publications and announcements — directory information shall include student name; address; telephone listing; grade level; photograph; date and place of birth; degrees, honors, and awards received; dates of attendance; most recent educational institution attended; participation in officially recognized activities and sports; and weight and height of members of athletic teams.

All Other Purposes

For all other purposes, directory information shall include student name; grade level; degree, honors, and awards received; and enrollment status.



(LOCAL) Policy Comparisons

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

In this packet, you will find:

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

Annotations are shown as follows:

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

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

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

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

Plan	The District shall develop a cybersecurity plan to secure the District's cyberinfrastructure against a cyberattack or any other cyber- security incidents, determine cybersecurity risk, and implement ap- propriate mitigation planning.
Coordinator	The Superintendent shall designate a cybersecurity coordinator. The cybersecurity coordinator shall serve as the liaison between the District and the Texas Education Agency in cybersecurity matters.
Training	<p>The Board delegates to the Superintendent the authority to:</p> <ol style="list-style-type: none">1. Determine the cybersecurity training program to be used in the District;2. Verify and report compliance with training requirements in accordance with guidance from the Department of Information Resources; and3. Remove access to the District's computer systems and data-bases for noncompliance with training requirements as appropriate. <p>The District shall complete periodic audits to ensure compliance with the cybersecurity training requirements.</p>
Security Breach Notifications	<p>Upon discovering or receiving notification of a breach of system security or a security incident, as defined by law, the District shall disclose the breach or incident to affected persons or entities in accordance with the time frames established by law. The District shall give notice by using one or more of the following methods:</p> <ol style="list-style-type: none">1. Written notice.2. Email, if the District has email addresses for the affected persons.3. Conspicuous posting on the District's websites.4. Publication through broadcast media. <p>The District shall disclose a breach or incident involving sensitive, protected, or confidential student information as required by law.</p>

**Building Access
Control**

Audits of building access control shall include weekly inspections of instructional facilities during school hours to certify all exterior doors are, by default, set to closed, latched, and locked status and cannot be opened from the outside without a key.

The Superintendent shall ensure that the findings of the weekly inspections are:

1. Reported to the District safety and security committee; and
2. Reported to the campus principal or lead administrator of the instructional facility to ensure awareness of any deficiencies identified.

The campus principal or lead administrator shall assign appropriate staff to take action to reduce the likelihood of similar deficiencies in the future.

The results of the weekly reports shall be kept for review as part of the required safety and security audit.

The District's building access control procedures shall not be interpreted as discouraging parents or guardians who have been properly verified as authorized visitors from visiting their student's campus. [See GKC]

EMPLOYMENT PRACTICES

DC
(LOCAL)

Personnel Duties

The Superintendent shall define the qualifications, duties, and responsibilities of all positions and shall ensure that job descriptions are current and accessible to employees and supervisors.

Posting Vacancies

The Superintendent or designee shall establish guidelines for advertising employment opportunities and posting notices of vacancies. These guidelines shall advance the Board's commitment to equal opportunity employment and to recruiting well-qualified candidates. Current District employees may apply for any vacancy for which they have appropriate qualifications.

Applications

All applicants shall complete the application form supplied by the District. Information on applications shall be confirmed before a contract is offered for a contractual position and before hiring or as soon as possible thereafter for a noncontractual position.

[For information related to the evaluation of criminal history records, see DBAA.]

Employment of Contractual Personnel

The Board delegates to the Superintendent final authority to employ contractual employees in the position of principal or below.

The Superintendent has sole authority to make recommendations to the Board regarding the selection of contractual personnel in a position above principal.

The Board retains final authority for employment of contractual personnel in a position above principal; however, from March 1 to August 31, the Board delegates to the Superintendent ~~the~~final authority to employ all contractual personnel. The Superintendent shall

inform the Board of any persons hired under this authority.

[See DCA, DCB, DCC, and DCE as appropriate]

Employment of Noncontractual Personnel

Note: For employment of a bus driver related to a Board member or the Superintendent, see DBE(LEGAL).

The Board delegates to the Superintendent final authority to employ and dismiss noncontractual employees on an at-will basis. [See DCD]

Employment Assistance Prohibited

No District employee shall assist another employee of the District or of any school district in obtaining a new job if the employee knows, or has probable cause to believe, that the other employee engaged in sexual misconduct regarding a minor or student in violation of the law. Routine transmission of an administrative or personnel file does not violate this prohibition. [See CJ for prohibitions]

relating to contractors and agents and DH(EXHIBIT) for the
Educators' Code of Ethics.]

Dyslexia and Related Disorders

The District shall comply with all rules and standards adopted by the State Board of Education and guidance published by the commissioner of education to implement the program to test students for dyslexia and related disorders.

In accordance with administrative procedures, the District shall provide regular training opportunities for teachers of students with dyslexia that include new research and practices for educating students with dyslexia.

SPECIAL PROGRAMS
COMPENSATORY SERVICES AND INTENSIVE PROGRAMS

EHBC
(LOCAL)

~~Each student who has been identified as being at risk of dropping out of school, who is not performing at grade level, or who did not perform satisfactorily on a state-mandated assessment shall be provided accelerated and/or compensatory educational services.~~

Accelerated Instruction

~~The District shall provide accelerated instruction in accordance with law if a student fails to perform satisfactorily on a state-mandated assessment.~~

Accelerated Learning Committee

~~When a student fails to perform satisfactorily on a math or reading state-mandated assessment in grades 3, 5, or 8, an accelerated learning committee shall develop a written educational plan in accordance with law. If a parent requests that the student be assigned to a particular teacher the following school year, the request shall be addressed in accordance with the District's administrative procedures.~~

~~A parent complaint about the content or implementation of the educational plan shall be filed in accordance with FNG.~~

COMPENSATORY SERVICES AND INTENSIVE PROGRAMS
ACCELERATED INSTRUCTION

EHBCA
(LOCAL)

Each student who has been identified as being at risk of dropping out of school, who is not performing at grade level, or who did not perform satisfactorily on a state-mandated assessment shall be provided accelerated and/or compensatory educational services.

**Accelerated
Instruction**

The District shall provide accelerated instruction in accordance with law if a student fails to perform satisfactorily on a state-mandated assessment.

Parent Request

If a student fails to perform satisfactorily on a state-mandated assessment, a parent's request that the student be assigned to a particular teacher the following school year shall be addressed in accordance with the District's administrative procedures.

**Accelerated
Education Plan**

Appropriate District staff shall develop an accelerated education plan for a student who fails to perform satisfactorily on the same state-mandated assessment for two or more consecutive years.

A parent complaint about the content or implementation of the accelerated education plan shall be filed in accordance with FNG.

Students in violation of the compulsory attendance law shall be reported to the District attendance officer, who may institute court action as provided by law.

Excused Absences

In addition to excused absences required by law, the District shall excuse absences for the following purposes. A student shall be required to submit verification of these absences in accordance with administrative regulations.

Higher Education Visits

The District shall excuse a student for up to two days during the student's junior year and up to two days during the student's senior year to visit an accredited institution of higher education.

Career Investigation

The District shall excuse a student for up to two days during the student's junior year and up to two days during the student's senior year to visit [a professional's workplace for purposes of exploring the student's interest in pursuing a career in that professional's field.](#)

Armed Services Enlistment

The District shall excuse a student 17 years of age or older for up to four days during his or her enrollment in high school for activities related to pursuing enlistment in a branch of the U.S. Armed Services or Texas National Guard.

Early Voting or Election Clerk

The District shall excuse a student for up to two days per school year to serve as an early voting or election clerk.

Learner or Driver's License

The District shall excuse a student 15 years of age or older for one day during his or her enrollment in high school for each of the following:

- Visiting a driver's license office to obtain a learner license; or
- Visiting a driver's license office to obtain a driver's license.

[For extracurricular activity absences, see FM.]

Withdrawal for Nonattendance

The District may initiate withdrawal of a student under the age of 19 for nonattendance under the following conditions:

1. The student has been absent ~~ten~~10 consecutive school days; and
2. Repeated efforts by the attendance officer and/or principal to locate the student have been unsuccessful.

[For District-initiated withdrawal of students 19 or older, see FEA(LEGAL).]

Students Attending Homeschools

Students who are homeschooled are exempt from the compulsory attendance law to the same extent as students enrolled in other private schools.

Adequate documentation of homeschooling for withdrawal shall consist of either a statement of withdrawal in accordance with FD(LOCAL) indicating the date homeschooling began, or a signed and dated letter from a parent or guardian indicating that his or her child is being homeschooled and the date the homeschooling began.

The District may request from a parent or guardian a letter of assurance that a child is being educated using a curriculum designed to meet basic education goals of reading, spelling, grammar, mathematics, and a study of good citizenship.

Enforcing
Compulsory
Attendance

If a parent or guardian refuses to submit a requested statement or letter, or if the District has evidence that a school-aged child is not being homeschooled within legal requirements, the District may investigate further and, if warranted, shall pursue legal action to enforce the compulsory attendance law.

No employee shall give any student prescription medication, non-prescription medication, herbal substances, anabolic steroids, or dietary supplements of any type, except as authorized by this or other District policy.

Medication Provided by Parent

The Superintendent shall designate the employees who are authorized to administer medication that has been provided by a student's parent. An authorized employee is permitted to administer the following medication in accordance with administrative regulations:

1. Prescription medication in accordance with legal requirements.
2. Nonprescription medication, upon a parent's written request, when properly labeled and in the original container.
3. Herbal substances or dietary supplements provided by the parent and only if required by the individualized education program or Section 504 plan for a student with disabilities.

Medication Provided by District

Except as required by law and provided in this policy, the District shall not purchase medication to administer to a student.

First-Aid

The District shall purchase certain topical nonprescription medications ~~and cough drops~~ for use when administering first aid to students in accordance with administrative regulations.

The Superintendent shall designate the employees who are authorized to administer nonprescription medication under this provision.

Athletic Program

The District shall purchase nonprescription medication that may be used to prevent or treat illness or injury in the District's athletic program. Only a licensed athletic trainer or a physician licensed to practice medicine in the state of Texas may administer this medication and may do so only if:

1. The District has prior written consent for medication to be administered [see Medical Treatment, below]; and
2. The administration of a medication by an athletic trainer is in accordance with a standing order or procedures approved by a physician licensed to practice medicine in the state of Texas.

Epinephrine

The District authorizes ~~school personnel and volunteers~~ school personnel who have agreed in writing and been adequately trained to administer an unassigned epinephrine auto-injector in accordance with law and this policy. Administration of epinephrine shall only be permitted when an

authorized and trained individual reasonably believes a person is experiencing anaphylaxis.

On Campus

Authorized and trained individuals may administer an unassigned epinephrine auto-injector at any time to a person experiencing anaphylaxis on a school campus.

The District shall ensure that at each campus a sufficient number of authorized individuals are trained to administer epinephrine so that at least one trained individual is present on campus during all hours the campus is open. In accordance with state rules, the campus shall be considered open for this purpose during regular on-campus school hours and whenever school personnel are physically on site for school-sponsored activities.

Off Campus

Authorized and trained individuals may administer an unassigned epinephrine auto-injector to a person experiencing anaphylaxis at an off-campus school event or while in transit to or from a school event when an unassigned epinephrine auto-injector is available.

Maintenance,
Availability, and
Training

The Superintendent shall develop administrative regulations designating a coordinator to manage policy implementation and addressing annual training of authorized individuals in accordance with law; procedures for auto-injector use; and acquisition or purchase, maintenance, expiration, disposal, availability of unassigned epinephrine auto-injectors at each campus, at off-campus events, and while in transit to and from a school event.

Notice to Parents

In accordance with law, the District shall provide notice of the policy to parents regarding the epinephrine program, including notice of any change to or discontinuation of this program.

Opioid Antagonist

This provision shall be applicable to every campus.

On Campus

The District authorizes school personnel who have been adequately trained to administer an opioid antagonist in accordance with law and this policy. Administration of an opioid antagonist shall only be permitted when an authorized and trained individual reasonably believes a person is experiencing an opioid-related over-dose.

Each applicable campus shall have at least one individual who is authorized and trained to administer an opioid antagonist present during regular school hours.

*Maintenance,
Availability,
Training, and
Reporting*

Each applicable campus shall have at least two unused, unexpired opioid antagonist doses available.

All opioid antagonists shall be stored in a secure location and shall be easily accessible by individuals who are authorized and trained to administer an opioid antagonist.

The Superintendent shall develop administrative regulations addressing acquisition, maintenance, expiration, and disposal of opioid antagonists in the District, as well as reporting, employee training, and emergency notification requirements.

Psychotropics

Except as permitted by law, an employee shall not:

1. Recommend to a student or a parent that the student use a psychotropic drug;
2. Suggest a particular diagnosis; or
3. Exclude the student from a class or a school-related activity because of the parent's refusal to consent to psychiatric evaluation or examination or treatment of the student.

Medical Treatment

A student's parent, legal guardian, or other person having lawful control shall annually complete and sign a form that provides emergency information and addresses authorization regarding medical treatment. A student who has reached age 18 shall be permitted to complete this form.

The District shall seek appropriate emergency care for a student as required or deemed necessary.

**Threat Assessment
and Safe and
Supportive Team**

In compliance with law, the Superintendent shall ensure that a multidisciplinary threat assessment and safe and supportive team is established to serve each campus. The Superintendent shall appoint team members. The team shall be responsible for developing and implementing a safe and supportive school program at each campus served by the team and shall support the District in implementing its multi-hazard emergency operations plan.

Training

Each team shall complete training provided by an approved provider on evidence-based threat assessment programs.

Student Reports

Each campus shall establish a clear procedure for a student to report concerning behavior exhibited by another student for assessment by the team or other appropriate District employee.

Employee
Confidentiality

A District employee who reports a potential threat may elect for the employee's identity to remain confidential and not be subject to disclosure under the state's public information law. The employee's identity shall only be revealed when necessary for the team, the District, or law enforcement to investigate the reported threat.

The District shall maintain a record of the identity of a District employee who elects for the employee's identity to remain confidential.

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Emergencies

A member of the team or any District employee may act immediately to prevent an imminent threat or respond to an emergency, including contacting law enforcement directly.

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Process

The District shall develop procedures as recommended by the Texas School Safety Center. In accordance with those procedures, the threat assessment and safe and supportive team shall conduct threat assessments using a process that includes:

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2. Conducting an individualized assessment based on reasonably available information to determine whether the individual poses a threat of violence or poses a risk of harm to self or others and the level of risk.
3. Implementing appropriate intervention and monitoring strategies, if the team determines an individual poses a threat of harm to self or others. These strategies may include referral of a student for a mental health assessment and escalation procedures as appropriate.

For a student or other individual the team determines poses a serious risk of violence to self or others, the team shall immediately report to the Superintendent, who shall immediately attempt to contact the student's parent or guardian. Additionally, the Superintendent shall coordinate with law enforcement authorities as necessary and take other appropriate action in accordance with the District's multihazard emergency operations plan.

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1. To a local mental health authority or health-care provider for evaluation or treatment; or
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The team shall not provide any mental health-care services, except as permitted by law.

Guidance to School
Community

The team shall provide guidance to students and District employees on recognizing harmful, threatening, or violent behavior that may pose a threat to another person, the campus, or the community and methods to report such behavior to the team, including through anonymous reporting.

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The team shall provide reports to the Texas Education Agency as required by law.

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

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

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

Custodian of Records

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

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

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3. All achievement records, as determined by tests, recorded grades, and teacher evaluations.
4. All documentation regarding a student's testing history and any accelerated instruction he or she has received, including any ~~documentation of discussion or action by an accelerated learning committee convened~~ education plan developed for the student.
5. Health services record, including:
 - a. The results of any tuberculin tests required by the District.
 - b. The findings of screening or health appraisal programs the District conducts or provides. [See FFAA]

- c. Immunization records. [See FFAB]
6. Attendance records.
7. Student questionnaires.
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15. Records pertaining to student and parent complaints.
16. Other records that may contribute to an understanding of the student.

Access by Parents

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

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

Copies of records are available at a per copy cost, payable in advance. Copies of records must be requested in writing. Parents may be denied copies of records if they fail to follow proper procedures or pay the copying charge. If the student qualifies for free or

reduced-price lunches and the parents are unable to view the records during regular school hours, upon written request of a parent, one copy of the record shall be provided at no charge.

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

Access by School Officials

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

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

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

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

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

1. Working with the student;
2. Considering disciplinary or academic actions, the student's case, or an individualized education program for a student with disabilities;
3. Compiling statistical data;
4. Reviewing an education record to fulfill the official's professional responsibility; or

5. Investigating or evaluating programs.

**Transcripts and
Transfers of Records**

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

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

**Records
Responsibility for
Students in Special
Education**

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

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

**Procedure to Amend
Records**

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

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

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

**Directory
Information**

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

STUDENT RECORDS

FL
(LOCAL)

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

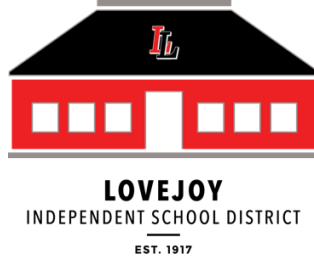
School-Sponsored
Purposes

For the following school-sponsored purposes all District publications and announcements directory information shall include student name; address; telephone listing; grade level; photograph; date and place of birth; degrees, honors, and awards received; dates of attendance; most recent educational institution attended; participation in officially recognized activities and sports; and weight and height of members of athletic teams.

For all other purposes, directory information shall include ~~student name; address; telephone listing; grade level; degree, honors, and awards received; and enrollment status.~~ student name; grade level; degree, honors, and awards received; and enrollment status.

All Other Purposes

10.E. Consider Approval of the Monthly Finance Report
Presenter: Thomas Willman, Chief Financial Officer



Lovejoy Independent School District Board of Trustees

Date of Meeting	February 26, 2024
Document Title	Monthly Finance Report
Presented For	X Board Action Report/Review Only
Supporting Documents	None X Attached Provided Later
Administrator Responsible	Thomas Willman, Chief Financial Officer

Executive Summary

The finance report is typically included as a standard report in the Consent Agenda section. The report gives a monthly status report for the Board of our cash and investment balances in the districts Balance Sheet reports, a month to date and year to date Revenue and Expenses report as compared to estimated annual revenue and expenditures adopted during the budget process. This monthly finance report is based on transactions through January 31, 2024.

Fiscal Implications

There are no direct fiscal implications of the action, as this is a monthly status report of activity previously approved by the Board.

Administrator Recommendation

The Monthly Finance Report for transactions through the end of January is compiled and presented for Board action. Administration recommends approval of the monthly financial report.

District Priority

Priority 3: Lovejoy ISD will prioritize community, connection, and

communication.

Priority 4: Lovejoy ISD will strategically plan for the safety and security of students and staff, financial sustainability, and effective operations.

**LOVEJOY ISD
2023-2024
FINANCIAL DASHBOARD**

FY23-24 Unaudited Financials: December 31, 2023						
	FY23-24 Target	Current YTD	Green	Yellow	Red	Notes
Enrollment	4,105	4,032	YTD>=Target	99.9%<YTD>98%	YTD<98%	Enrollment as of 1/31/2024 is 4,021. The average enrollment for the year through 1/31/2024 is 4,032. Funding is based on the average enrollment and average attendance for the year.
Average Daily Attendance	3,924	3,870	YTD>=Target	99.9%<YTD>98%	YTD<98%	Average Daily attendance through 01/31/2024 is 3869.94
Average Daily Attendance %	95.60%	95.99%	YTD>=98%	98%<YTD>95.6%	YTD<95.6%	ADA % at this time last year was 95.88%. We are seeing an improvement in attendance year over year by .77%.
Net Surplus/<Deficit> *Reflects Target for Budget Amendment #1	(546,144)	6,276,827	YTD>=Target	99.9%<YTD>98%	YTD<98%	Our accounting approach is a modified accrual basis, therefor tax collections are on a cash basis so the first 4-5 months will operate in a deficit. In December and January the district operated a surplus due to the tax revenue collection.
Total Cash		48,952,327				General Fund Cash = \$27,673,186; Student Nutrition Cash = \$556,641; Debt Service Cash = \$18,101,877; Special Revenue Cash = \$1,217,198; Bond Cash = \$1,403,425
Days of Cash on Hand- General Fund	120	237	>45/60	n/a	<45/60	
Days of Operating expense in General Fund Balance	120	192	>=120	120<x>90	<90	Our accounting approach is a modified accrual basis, therefor tax collections are on a cash basis so the first 4-5 months will operate in a deficit. In December and January the district operated a surplus due to the tax revenue collection. We anticipate to end the year with 142 Days

Statement of Revenue, Expenditures, and Changes in Fund Balance

This financial summary report provides a status update on Lovejoy ISD's revenue, expenditures, and change in fund balance through the end of January 2024. This financial statement compares monthly and year-to-date revenues and costs to the anticipated budget. If there is an unfavorable (negative) variance, then this could indicate a potential shortfall in revenues or an overspend in expenses. A favorable (positive) variance could indicate a potential increase in overall revenue or cost savings. These variances require additional analysis to determine the projected year-end outcome. Below, we will provide additional information and variance explanations.

The final columns on the right reflect the overall budget for the 2023-2024 fiscal year. The budget is based on budget amendment #2 that was approved during the January regular board meeting. We also reflect the remaining total revenue and expenditures for the fiscal year and the remaining percentage of the budget.

GENERAL FUND

Revenue

Lovejoy ISD is a little more than halfway through the 2023-2024 fiscal year, and we have recognized approximately 72% of the anticipated budgeted revenue.

Local Revenue: This line item consists primarily of local tax collection. The budget for local tax collection is based on historical collections. Last year, 2022-2023, Lovejoy ISD received approximately eighty percent (80%) of the assessed levy. In the current year, 2023-2024, Lovejoy ISD has received only seventy six percent (76%) of the assessed levy. Even though there is an unfavorable month and year-to-date variance for local revenue, this does not indicate an anticipated year-end shortfall in revenue.

State Revenue: The state revenue reflects the actual earned revenue through the first ninety-five (95) school days. We monitor this very closely, given the funding can fluctuate based on enrollment and daily attendance changes. Currently, we are seeing a favorable (positive) variance due to the current actual attendance rates. Lovejoy's attendance rate has dropped over the last couple of months. We are on pace to reach the budgeted attendance rate of 95.6% which means the district anticipates to meet budget.

Federal Revenue: Most of Lovejoy ISD's federal revenue is related to School Health and Related Services (SHARS). This program allows the district to request reimbursement for Medicaid health-related services. The district receives one lump sum payment in February, which amounts to approximately forty-five (45) percent of the

federal budget. The second most significant funding source is the childcare relief grant. The district was anticipating the final installment payment in November—the unfavorable (negative) variance results from the pending childcare relief payment.

Expenditures

Payroll: The year-to-date favorable variance is due to the timing of substitutes and hourly support staff, such as athletic gate workers. Some of the current year-to-date variance is attributed to unfilled positions. Future budget amendments will capture any cost savings associated with unfilled positions to date.

Non-personnel: The district has forty-four (44) percent remaining in non-personnel. The year-to-date variances within these expense categories are timing and budget spread adjustments rather than an indicator for an actual variance to the district at year-end. The district is fifty-eight (58) percent through the fiscal year and the school year. Since forty-four (44) percent remains to spend, there are opportunities to discuss potential cost savings during our monthly budget meeting with budget managers.

Balance Sheet

This financial statement summarizes the district's assets, liabilities, and fund balance through January 31, 2024. Lovejoy ISD has a \$27.7 million cash balance in the operating and investment accounts. This is enough to cover approximately eight (8) months or two hundred and thirty-seven (237) days of General Fund operating expenses.

Lovejoy ISD has approximately \$6.7 million in general fund liabilities. Lovejoy ISD's accrued wages payable are related to the district employees who are contracted to work less than twelve (12) months throughout the year, such as teachers and teacher aides. These employees have earned their income, and the district spreads these payments over twelve (12) months.

Lovejoy ISD's increase in unearned revenue is related to the cash payment received for State funding. TEA pays Lovejoy ISD based on an estimated enrollment and average daily attendance provided by Lovejoy ISD in November 2022. Lovejoy ISD receives seventy percent (70%) of the payment by October 31, 2023. Lovejoy ISD has earned only 46% of the overall revenue, leaving the remaining as a liability to the district as unearned revenue.

STUDENT NUTRITION FUND

Revenue

Lovejoy ISD Student Nutrition Fund Revenue is based on student participation in the meal program through the first ninety-five (95) school days. The 95 days represent approximately 58% of the school year.

Local Revenue: This line item consists primarily of daily meal sales. The overall participation through the month of January is down by almost one percent. Even though participation is down we are on track given the sales to date represent fifty-three (53) percent of the overall budget.

State Revenue: The state revenue for student nutrition is associated with an accounting treatment for TRS on-behalf. We are required to recognize the TRS expense on behalf of the state while also offsetting it with revenue. Currently the software codes all of this to the general fund.

Federal Revenue: Most of Lovejoy ISD's federal revenue is related to the National School Lunch Program (NSLP). This program allows the district to request reimbursement for meals for those families that qualify for free or reduced lunch. The district receives payments. The unfavorable (negative) variance results from the decline in the number of students qualifying. The anticipated decline in revenue will be offset from cost savings in payroll.

Expenditures

Payroll: The year-to-date favorable variance is attributed to unfilled positions at each of the campuses. The budget amendment #2 will reflect the cost savings associated with unfilled positions to date.

Non-personnel: The district has forty-four (44) percent remaining in non-personnel. The year-to-date variances within these expense categories are timing and budget spread adjustments rather than an indicator for an actual variance to the district at year-end. The district is fifty-eight (58) percent through the fiscal year and the school year. Since forty-four (44) percent remains to spend, there are opportunities to discuss potential cost savings during our monthly budget meeting with budget managers.

Balance Sheet

This financial statement summarizes the district's assets, liabilities, and fund balance through January 31, 2024 for the student nutrition fund. Lovejoy ISD has a \$556,641 cash balance in the operating accounts. This is enough to cover approximately three (3) months or eight-two (82) days of operating expenses.

Lovejoy ISD has approximately \$304,034 in student nutrition fund liabilities. Lovejoy ISD's accrued wages payable are related to the district employees who are contracted to work less than twelve (12) months throughout the year, such as teachers and teacher aides. These employees have earned their income, and the district spreads these payments over twelve (12) months.

Lovejoy ISD's increase in unearned revenue is related to the cash payment received in student accounts as pre-payments for future meals.

LOVEJOY ISD 2023-2024
STATEMENT OF REVENUE, EXPENDITURES, AND CHANGES IN FUND BALANCE
GENERAL FUND AS OF 1/31/2024

	Month to Date (MTD)				Year to Date (YTD)				Total Amended Budget	Remaining	% Remaining
	Actual	Budget	Variance (+/-)	% Var	Actual	Budget	Variance (+/-)	% Var			
REVENUE											
Local	\$ 8,483,621	\$ 9,340,200	\$ (856,578)	-9%	\$ 24,379,226	\$ 26,248,784	\$ (1,869,558)	-7%	\$ 32,979,450	\$ 8,600,224	26%
State	\$ 741,050	\$ 902,849	\$ (161,800)	-18%	\$ 5,219,686	\$ 4,609,768	\$ 609,918	13%	\$ 7,908,113	\$ 2,688,427	34%
Federal	\$ 15,016	\$ -	\$ 15,016	0%	\$ 171,993	\$ 321,802	\$ (149,809)	-47%	\$ 638,216	\$ 466,223	73%
Transfer In from Another Fund	\$ 180	\$ -	\$ 180	0%	\$ 6,851	\$ -	\$ 6,851	0%	\$ -	\$ (6,851)	0%
TOTAL	\$ 9,239,867	\$ 10,243,049	\$ (1,003,182)	-10%	\$ 29,777,756	\$ 31,180,355	\$ (1,402,599)	-4%	\$ 41,525,779	\$ 11,748,024	28%
EXPENDITURES											
PAYROLL COST											
Teachers & Other Professional Support	\$ 2,495,075	\$ 2,567,355	\$ 72,280	3%	\$ 14,160,844	\$ 14,444,341	\$ 283,497	2%	\$ 24,507,498	\$ 10,346,654	42%
Employee Allowances	\$ 482,802	\$ 494,108	\$ 11,306	2%	\$ 3,156,732	\$ 3,133,643	\$ (23,090)	-1%	\$ 5,543,885	\$ 2,387,153	43%
Employee Benefits	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
Employee Benefits	\$ 246,702	\$ 521,403	\$ 274,701	53%	\$ 2,537,892	\$ 3,076,282	\$ 538,390	18%	\$ 5,214,034	\$ 2,676,142	51%
SUBTOTAL	\$ 3,224,579	\$ 3,582,866	\$ 358,286	10%	\$ 19,855,468	\$ 20,654,266	\$ 798,798	4%	\$ 35,265,417	\$ 15,409,949	44%
PROFESSIONAL & CONTRACTED SERVICES											
Professional Services	\$ 113,780	\$ 81,146	\$ (32,634)	-40%	\$ 581,511	\$ 575,254	\$ (6,257)	-1%	\$ 1,041,613	\$ 460,102	44%
Tuition and Transfer Payments	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ 761,512	\$ 761,512	100%
Education Service Center Services	\$ 911	\$ 3,841	\$ 2,929	76%	\$ 6,380	\$ 18,584	\$ 12,204	66%	\$ 32,027	\$ 25,647	80%
Contracted Maintenance and Repair	\$ 36,045	\$ 40,756	\$ 4,711	12%	\$ 188,182	\$ 216,987	\$ 28,806	13%	\$ 359,633	\$ 171,451	48%
Utilities	\$ 152,677	\$ 103,539	\$ (49,138)	-47%	\$ 734,262	\$ 724,772	\$ (9,489)	-1%	\$ 1,242,467	\$ 508,205	41%
Rentals	\$ 7,177	\$ 3,327	\$ (3,850)	-116%	\$ 52,143	\$ 50,057	\$ (2,085)	-4%	\$ 97,414	\$ 45,272	46%
Misc Contracted Services	\$ 11,379	\$ 5,145	\$ (6,234)	-121%	\$ 23,563	\$ 24,866	\$ 1,303	5%	\$ 42,873	\$ 19,310	45%
SUBTOTAL	\$ 321,969	\$ 237,754	\$ (84,215)	-35%	\$ 1,586,040	\$ 1,610,520	\$ 24,481	2%	\$ 3,577,539	\$ 1,991,500	56%
SUPPLIES & MATERIALS											
Supplies & Materials for Maintenance	\$ 38,038	\$ 64,508	\$ 26,471	41%	\$ 242,092	\$ 291,791	\$ 49,699	17%	\$ 517,570	\$ 275,478	53%
Instructional Materials	\$ 782	\$ 1,937	\$ 1,155	60%	\$ 2,790	\$ 9,361	\$ 6,571	70%	\$ 16,140	\$ 13,350	83%
Testing Materials	\$ -	\$ 9,246	\$ 9,246	100%	\$ 15,921	\$ 44,689	\$ 28,768	64%	\$ 77,050	\$ 61,129	79%
Food Service	\$ 369	\$ 1,565	\$ 1,196	76%	\$ 2,563	\$ 7,565	\$ 5,001	66%	\$ 13,042	\$ 10,479	80%
General Supplies & Materials	\$ 75,495	\$ 130,160	\$ 54,665	42%	\$ 695,063	\$ 626,375	\$ (68,688)	-11%	\$ 1,086,856	\$ 391,793	36%
SUBTOTAL	\$ 114,684	\$ 207,416	\$ 92,732	45%	\$ 958,429	\$ 979,780	\$ 21,351	2%	\$ 1,710,658	\$ 752,229	44%
OTHER OPERATING EXPENSES											
Travel	\$ 16,490	\$ 31,361	\$ 14,871	47%	\$ 88,809	\$ 152,037	\$ 63,228	42%	\$ 261,799	\$ 172,990	66%
Insurance	\$ (1,637)	\$ 1,694	\$ 3,331	197%	\$ 440,090	\$ 441,612	\$ 1,522	0%	\$ 447,539	\$ 7,449	2%
Election Cost	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ 17,000	\$ 17,000	100%
Misc Operating Costs	\$ 29,245	\$ 52,912	\$ 23,667	45%	\$ 284,204	\$ 265,556	\$ (18,649)	-7%	\$ 450,748	\$ 166,543	37%
Transfer out to other funds	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
SUBTOTAL	\$ 44,098	\$ 85,966	\$ 41,868	49%	\$ 813,103	\$ 859,204	\$ 46,101	5%	\$ 1,177,086	\$ 363,983	31%
DEBT SERVICE											
SUBTOTAL	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
CAPITAL-LAND,BUILDINGS, & EQUIPMENT											
Land	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
Building (Purchase,Construction, or Improvements)	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
Furniture and Equipment	\$ 65,726	\$ 37,467	\$ (28,259)	-75%	\$ 287,889	\$ 181,089	\$ (106,799)	-59%	\$ 312,223	\$ 24,335	8%
Capital Assets	\$ -	\$ 3,120	\$ 3,120	100%	\$ -	\$ 15,080	\$ 15,080	100%	\$ 26,000	\$ 26,000	100%
Leased Capital Assets	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
Library Books and Media	\$ -	\$ 360	\$ 360	100%	\$ -	\$ 1,740	\$ 1,740	100%	\$ 3,000	\$ 3,000	100%
SUBTOTAL	\$ 65,726	\$ 40,947	\$ (24,779)	-61%	\$ 287,889	\$ 197,909	\$ (89,979)	-45%	\$ 341,223	\$ 53,335	16%
SUBTOTAL NON-PERSONNEL EXPENSES	\$ 546,477	\$ 572,083	\$ 25,606	4%	\$ 3,645,461	\$ 3,647,415	\$ 1,954	0%	\$ 6,806,507	\$ 3,161,046	46%
TOTAL EXPENDITURES	\$ 3,771,056	\$ 4,154,948	\$ 383,892	9%	\$ 23,500,928	\$ 24,301,680	\$ 800,752	3%	\$ 42,071,923	\$ 18,570,995	44%
NET CONTRIBUTION - SURPLUS/<DEFICIT>	\$ 5,468,810	\$ 6,088,100	\$ (619,290)	-10%	\$ 6,276,827	\$ 6,878,674	\$ (601,847)	-9%	\$ (546,144)	\$ (6,822,971)	

LOVEJOY ISD 2023-2024
STATEMENT OF REVENUE, EXPENDITURES, AND CHANGES IN FUND BALANCE
STUDENT NUTRITION FUNDS AS OF 1/31/2024

	Month to Date (MTD)				Year to Date (YTD)				Total Amended Budget	Remaining	% Remaining
	Actual	Budget	Variance (+/-)	% Var	Actual	Budget	Variance (+/-)	% Var			
REVENUE											
Local	\$ 220,916	\$ 217,026	\$ 3,890	2%	\$ 1,067,266	\$ 1,048,959	\$ 18,307	2%	\$ 1,808,550	\$ 741,284	41%
State	\$ -	\$ 8,794	\$ (8,794)	-100%	\$ -	\$ 51,372	\$ (51,372)	-100%	\$ 87,139	\$ 87,139	100%
Federal	\$ -	\$ 16,080	\$ (16,080)	-100%	\$ 40,288	\$ 77,720	\$ (37,432)	-48%	\$ 202,945	\$ 162,657	80%
Transfer In from Another Fund	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
TOTAL	\$ 220,916	\$ 241,900	\$ (20,984)	-9%	\$ 1,107,554	\$ 1,178,051	\$ (70,497)	-6%	\$ 2,098,634	\$ 991,080	47%
EXPENDITURES											
PAYROLL COST											
Teachers & Other Professional Support	\$ 9,999	\$ 12,358	\$ 2,360	19%	\$ 69,990	\$ 72,914	\$ 2,924	4%	\$ 123,583	\$ 53,593	43%
Employee Benefits	\$ 73,805	\$ 83,094	\$ 9,289	11%	\$ 396,609	\$ 490,255	\$ 93,646	19%	\$ 830,940	\$ 434,331	52%
	\$ 16,109	\$ 20,749	\$ 4,640	22%	\$ 87,968	\$ 122,421	\$ 34,453	28%	\$ 207,494	\$ 119,526	58%
SUBTOTAL	\$ 99,912	\$ 116,202	\$ 16,289	14%	\$ 554,567	\$ 685,590	\$ 131,023	19%	\$ 1,162,017	\$ 607,450	52%
PROFESSIONAL & CONTRACTED SERVICES											
Contracted Maintenance and Repair	\$ 3,607	\$ 4,800	\$ 1,193	25%	\$ 20,907	\$ 23,200	\$ 2,293	10%	\$ 40,000	\$ 19,093	48%
SUBTOTAL	\$ 3,607	\$ 4,800	\$ 1,193	25%	\$ 20,907	\$ 23,200	\$ 2,293	10%	\$ 40,000	\$ 19,093	48%
SUPPLIES & MATERIALS											
Food Service	\$ 93,255	\$ 93,668	\$ 414	0%	\$ 467,153	\$ 452,731	\$ (14,423)	-3%	\$ 849,515	\$ 382,362	45%
General Supplies & Materials	\$ 89	\$ 2,856	\$ 2,767	97%	\$ 5,509	\$ 13,805	\$ 8,295	60%	\$ 23,801	\$ 18,292	77%
SUBTOTAL	\$ 93,344	\$ 96,525	\$ 3,181	3%	\$ 472,663	\$ 466,535	\$ (6,127)	-1%	\$ 873,316	\$ 400,653	46%
OTHER OPERATING EXPENSES											
Travel	\$ 429	\$ 540	\$ 111	21%	\$ 1,508	\$ 2,610	\$ 1,102	42%	\$ 4,500	\$ 2,992	66%
Misc Operating Costs	\$ 494	\$ 2,256	\$ 1,762	78%	\$ 1,514	\$ 10,904	\$ 9,390	86%	\$ 18,800	\$ 17,286	92%
Transfer out to other funds	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
SUBTOTAL	\$ 922	\$ 2,796	\$ 1,874	67%	\$ 3,022	\$ 13,514	\$ 10,492	78%	\$ 23,300	\$ 20,278	87%
CAPITAL-LAND,BUILDINGS, & EQUIPMENT											
Furniture and Equipment	\$ -	\$ 0	\$ 0	100%	\$ 222,534	\$ 348,726	\$ 126,192	36%	\$ 348,727	\$ 126,192	36%
Library Books and Media	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
SUBTOTAL	\$ -	\$ 0	\$ 0	100%	\$ 222,534	\$ 348,726	\$ 126,192	36%	\$ 348,727	\$ 126,192	36%
SUBTOTAL NON-PERSONNEL EXPENSES	\$ 97,873	\$ 104,121	\$ 6,248	6%	\$ 719,126	\$ 851,975	\$ 132,849	16%	\$ 1,285,343	\$ 566,217	44%
TOTAL EXPENDITURES	\$ 197,785	\$ 220,322	\$ 22,537	10%	\$ 1,273,693	\$ 1,537,565	\$ 263,872	17%	\$ 2,447,360	\$ 1,173,667	48%
NET CONTRIBUTION - SURPLUS/<DEFICIT>	\$ 23,130	\$ 21,578	\$ 1,553	-7%	\$ (166,139)	\$ (359,514)	\$ 193,375	54%	\$ (348,726)	\$ (182,586)	52%

LOVEJOY ISD 2023-2024
STATEMENT OF REVENUE, EXPENDITURES, AND CHANGES IN FUND BALANCE
DEBT SERVICE FUNDS AS OF 1/31/2024

	Month to Date (MTD)				Year to Date (YTD)				Total Amended Budget	Remaining	% Remaining
	Actual	Budget	Variance (+/-)	% Var	Actual	Budget	Variance (+/-)	% Var			
REVENUE											
Local	\$ 5,480,869	\$ 5,208,876	\$ 271,993	5%	\$ 15,046,738	\$ 14,395,820	\$ 650,917	5%	\$ 18,015,088	\$ 2,968,350	16%
State	\$ -	\$ -	\$ -	0%	\$ 912,466	\$ -	\$ 912,466	0%	\$ -	\$ (912,466)	0%
Federal	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
Transfer In from Another Fund	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
TOTAL	\$ 5,480,869	\$ 5,208,876	\$ 271,993	5%	\$ 15,959,204	\$ 14,395,820	\$ 1,563,383	11%	\$ 18,015,088	\$ 2,055,884	11%
EXPENDITURES											
Misc Operating Costs	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
DEBT SERVICE											
Principal	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ 12,179,744	\$ 12,179,744	100%
Interest Expense	\$ -	\$ -	\$ -	0%	\$ 2,462,809	\$ 2,462,809	\$ -	0%	\$ 4,925,621	\$ 2,462,812	50%
Other Debt Service Expenses	\$ -	\$ -	\$ -	0%	\$ 6,000	\$ 6,000	\$ -	0%	\$ 8,500	\$ 2,500	29%
SUBTOTAL	\$ -	\$ -	\$ -	0%	\$ 2,468,809	\$ 2,468,809	\$ -	0%	\$ 17,113,865	\$ 14,645,056	86%
SUBTOTAL NON-PERSONNEL EXPENSES	\$ -	\$ -	\$ -	0%	\$ 2,468,809	\$ 2,468,809	\$ -	0%	\$ 17,113,865	\$ 14,645,056	86%
TOTAL EXPENDITURES	\$ -	\$ -	\$ -	0%	\$ 2,468,809	\$ 2,468,809	\$ -	0%	\$ 17,113,865	\$ 14,645,056	86%
NET CONTRIBUTION - SURPLUS/<DEFICIT>	\$ 5,480,869	\$ 5,208,876	\$ 271,993	5%	\$ 13,490,394	\$ 11,927,011	\$ 1,563,383	13%	\$ 901,223	\$ (12,589,171)	-1397%

LOVEJOY ISD 2023-2024
STATEMENT OF REVENUE, EXPENDITURES, AND CHANGES IN FUND BALANCE
SPECIAL REVENUE FUNDS AS OF 1/31/2024

	Month to Date (MTD)				Year to Date (YTD)				Total Amended Budget	Remaining	% Remaining
	Actual	Budget	Variance (+/-)	% Var	Actual	Budget	Variance (+/-)	% Var			
REVENUE											
Local	\$ 197,082	\$ 64,439	\$ 132,643	206%	\$ 403,063	\$ 311,455	\$ 91,608	29%	\$ 536,991	\$ 133,928	25%
State	\$ 86,276	\$ 64,941	\$ 21,335	33%	\$ 427,284	\$ 313,881	\$ 113,404	36%	\$ 541,174	\$ 113,889	21%
Federal	\$ 77,438	\$ 130,476	\$ (53,038)	-41%	\$ 698,960	\$ 630,634	\$ 68,326	11%	\$ 1,087,300	\$ 388,340	36%
Transfer In from Another Fund	\$ -	\$ -	\$ -	0%	\$ 2,600	\$ -	\$ 2,600	0%	\$ -	\$ (2,600)	0%
TOTAL	\$ 360,796	\$ 259,856	\$ 100,940	39%	\$ 1,531,907	\$ 1,255,970	\$ 275,938	22%	\$ 2,165,465	\$ 633,558	29%
EXPENDITURES											
PAYROLL COST											
Teachers & Other Professional	\$ 60,529	\$ 86,009	\$ 25,480	30%	\$ 512,416	\$ 507,454	\$ (4,962)	-1%	\$ 860,092	\$ 347,675	40%
Support	\$ 20,976	\$ 21,087	\$ 111	1%	\$ 150,276	\$ 124,732	\$ (25,544)	-20%	\$ 211,187	\$ 60,911	29%
Employee Allowances	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
Employee Benefits	\$ 11,349	\$ 13,764	\$ 2,415	18%	\$ 79,314	\$ 81,219	\$ 1,905	2%	\$ 137,653	\$ 58,338	42%
SUBTOTAL	\$ 92,854	\$ 120,860	\$ 28,006	23%	\$ 742,006	\$ 713,404	\$ (28,602)	-4%	\$ 1,208,931	\$ 466,925	39%
PROFESSIONAL & CONTRACTED SERVICES											
Professional Services	\$ 21,750	\$ 11,636	\$ (10,114)	-87%	\$ 67,000	\$ 56,241	\$ (10,759)	-19%	\$ 96,968	\$ 29,968	31%
Tuition and Transfer Payments	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
Education Service Center Services	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
Contracted Maintenance and Repair	\$ -	\$ 23	\$ 23	100%	\$ (50)	\$ 112	\$ 162	144%	\$ 194	\$ 244	126%
Utilities	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
Rentals	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
Misc Contracted Services	\$ -	\$ 6,120	\$ 6,120	100%	\$ -	\$ 29,580	\$ 29,580	100%	\$ 51,000	\$ 51,000	100%
SUBTOTAL	\$ 21,750	\$ 17,779	\$ (3,971)	-22%	\$ 66,950	\$ 85,934	\$ 18,984	22%	\$ 148,161	\$ 81,211	55%
SUPPLIES & MATERIALS											
Supplies & Materials for Maintenance	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
Instructional Materials	\$ -	\$ 31,164	\$ 31,164	100%	\$ 216,221	\$ 150,624	\$ (65,597)	-44%	\$ 259,696	\$ 43,475	17%
Testing Materials	\$ (196)	\$ 12,660	\$ 12,856	102%	\$ (196)	\$ 61,191	\$ 61,387	100%	\$ 105,502	\$ 105,698	100%
Food Service	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
General Supplies & Materials	\$ 37,083	\$ 87,703	\$ 50,620	58%	\$ 426,378	\$ 433,443	\$ 7,065	2%	\$ 740,403	\$ 314,025	42%
SUBTOTAL	\$ 36,887	\$ 131,527	\$ 94,639	72%	\$ 642,404	\$ 645,258	\$ 2,855	0%	\$ 1,105,602	\$ 463,198	42%
OTHER OPERATING EXPENSES											
Travel	\$ -	\$ 4,533	\$ 4,533	100%	\$ 24,218	\$ 21,911	\$ (2,307)	-11%	\$ 37,777	\$ 13,559	36%
Insurance	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
Election Cost	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
Depreciation	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
Misc Operating Costs	\$ 27,691	\$ 121,794	\$ 94,103	77%	\$ 23,906	\$ 588,344	\$ 564,438	96%	\$ 1,014,625	\$ 990,719	98%
Transfer out to other funds	\$ -	\$ -	\$ -	0%	\$ 2,600	\$ -	\$ (2,600)	0%	\$ -	\$ (2,600)	0%
SUBTOTAL	\$ 27,691	\$ 126,328	\$ 98,637	78%	\$ 50,724	\$ 610,255	\$ 559,531	92%	\$ 1,052,402	\$ 1,001,678	95%
DEBT SERVICE											
SUBTOTAL	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
SUBTOTAL NON-PERSONNEL EXPENSES	\$ 86,328	\$ 277,671	\$ 191,343	69%	\$ 770,098	\$ 1,351,295	\$ 581,197	43%	\$ 2,323,144	\$ 1,553,047	67%
TOTAL EXPENDITURES	\$ 179,182	\$ 398,531	\$ 219,349	55%	\$ 1,512,104	\$ 2,064,699	\$ 552,596	27%	\$ 3,532,075	\$ 2,019,972	57%
NET CONTRIBUTION - SURPLUS/<DEFICIT>	\$ 181,613	\$ (138,676)	\$ (118,409)	85%	\$ 19,804	\$ (808,730)	\$ (276,658)	34%	\$ (1,366,610)	\$ (1,386,414)	101%

LOVEJOY ISD 2023-2024
STATEMENT OF REVENUE, EXPENDITURES, AND CHANGES IN FUND BALANCE
CAPITAL/BOND FUNDS AS OF 1/31/2024

	Month to Date (MTD)				Year to Date (YTD)				Total Amended Budget	Remaining	% Remaining
	Actual	Budget	Variance (+/-)	% Var	Actual	Budget	Variance (+/-)	% Var			
REVENUE											
Local	\$ 6,888	\$ -	\$ 6,888	0%	\$ 58,184	\$ -	\$ 58,184	0%	\$ -	\$ (58,184)	0%
State	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
Federal	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
Transfer In from Another Fund	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
TOTAL	\$ 6,888	\$ -	\$ 6,888	0%	\$ 58,184	\$ -	\$ 58,184	0%	\$ -	\$ (58,184)	0%
EXPENDITURES											
PAYROLL COST											
SUBTOTAL	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
PROFESSIONAL & CONTRACTED SERVICES											
Contracted Maintenance and Repair	\$ 17,888	\$ -	\$ (17,888)	0%	\$ 106,837	\$ -	\$ (106,837)	0%	\$ -	\$ (106,837)	0%
SUBTOTAL	\$ 17,888	\$ -	\$ (17,888)	0%	\$ 106,837	\$ -	\$ (106,837)	0%	\$ -	\$ (106,837)	0%
SUPPLIES & MATERIALS											
SUBTOTAL	\$ 225	\$ -	\$ (225)	0%	\$ 19,630	\$ -	\$ (19,630)	0%	\$ -	\$ (19,630)	0%
OTHER OPERATING EXPENSES											
SUBTOTAL	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
DEBT SERVICE											
SUBTOTAL	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
CAPITAL-LAND,BUILDINGS, & EQUIPMENT											
Land	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
Building (Purchase,Construction, or Improvements)	\$ 33,180	\$ -	\$ (33,180)	0%	\$ 197,891	\$ -	\$ (197,891)	0%	\$ -	\$ (197,891)	0%
Furniture and Equipment	\$ -	\$ -	\$ -	0%	\$ 7,800	\$ -	\$ (7,800)	0%	\$ -	\$ (7,800)	0%
Capital Assets	\$ 89,063	\$ -	\$ (89,063)	0%	\$ 401,576	\$ -	\$ (401,576)	0%	\$ -	\$ (401,576)	0%
Leased Capital Assets	\$ 6,250	\$ -	\$ (6,250)	0%	\$ 12,250	\$ -	\$ (12,250)	0%	\$ -	\$ (12,250)	0%
Library Books and Media	\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%	\$ -	\$ -	0%
SUBTOTAL	\$ 128,493	\$ -	\$ (128,493)	0%	\$ 619,517	\$ -	\$ (619,517)	0%	\$ -	\$ (619,517)	0%
SUBTOTAL NON-PERSONNEL EXPENSES	\$ 146,606	\$ -	\$ (146,606)	0%	\$ 745,985	\$ -	\$ (745,985)	0%	\$ -	\$ (745,985)	0%
TOTAL EXPENDITURES	\$ 146,606	\$ -	\$ (146,606)	0%	\$ 745,985	\$ -	\$ (745,985)	0%	\$ -	\$ (745,985)	0%
NET CONTRIBUTION - SURPLUS/<DEFICIT>	\$ (139,718)	\$ -	\$ 153,494	0%	\$ (687,800)	\$ -	\$ 804,169	0%	\$ -	\$ 687,800	0%

LOVEJOY ISD 2023-2024
BALANCE SHEET AS OF 1/31/2024
GENERAL FUND

FY23-24 Unaudited Financials: December 31, 2023

ASSETS

	YTD	Ending Balance 6/30/2023	Change
Cash and Cash Equivalent	\$ 97,862	\$ (800,342)	\$ 898,204
Current Investments	\$ 27,575,324	\$ 21,727,406	\$ 5,847,918
Property Taxes - Delinquent	\$ 927,609	\$ 927,609	\$ -
Allowance for Uncollectible Taxes	\$ (9,276)	\$ (9,276)	\$ -
Due from Other Government	\$ 499,883	\$ 929,623	\$ 429,739
Due from Other Funds	\$ (0)	\$ 325,655	\$ 325,655
Inventories	\$ -	\$ -	\$ -
Prepayments	\$ 58,875	\$ 87,668	\$ 28,792
CURRENT ASSETS	\$ 29,150,278	\$ 23,188,342	\$ 7,530,309

CAPITAL ASSETS

Land	\$ -	\$ -	\$ -
Building, Net	\$ -	\$ -	\$ -
Furniture and Equipment, Net	\$ -	\$ -	\$ -
Other Capital Assets, Net	\$ -	\$ -	\$ -
Construction in Progress	\$ -	\$ -	\$ -
Accumulated Depreciation	\$ -	\$ -	\$ -
SUBTOTAL	\$ -	\$ -	\$ -

TOTAL ASSETS

\$ 29,150,278	\$ 23,188,342	\$ 5,961,935
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LIABILITIES

Accounts Payable	\$ 571	\$ 300,013	\$ 299,442
Payroll Deductions and Withholdings	\$ 234,954	\$ (4,047)	\$ (239,000)
Accrued Wages Payable	\$ 3,435,742	\$ 3,077,230	\$ (358,512)
Due to Other Funds	\$ -	\$ -	\$ -
Due to Other Governments	\$ (5,663)	\$ 1,678,301	\$ 1,683,964
Accrued Expenses	\$ 127,091	\$ 156,369	\$ 29,278
Unearned Revenue	\$ 2,914,687	\$ 1,814,408	\$ (1,100,279)
CURRENT LIABILITIES	\$ 6,707,382	\$ 7,022,275	\$ 314,892

LONG TERM LIABILITIES

Bonds, Notes, Loans, Leases	\$ -	\$ -	\$ -
SUBTOTAL	\$ -	\$ -	\$ -

TOTAL LIABILITIES

\$ 6,707,382	\$ 7,022,275	\$ 314,892
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FUND BALANCES

Restricted: Federal or State Funds	\$ 25,726	\$ 25,726	\$ -
Restricted Retirement of LT Debt	\$ -	\$ -	\$ -
Construction	\$ -	\$ -	\$ -
Other Committed Fund Balance	\$ -	\$ -	\$ -
Unassigned Fund Balance	\$ 22,417,170	\$ 16,140,342	\$ 6,276,827
SUBTOTAL	\$ 22,442,895	\$ 16,166,068	\$ 6,276,827

TOTAL LIABILITIES AND FUND BALANCE

\$ 29,150,278	\$ 23,188,342	\$ (5,961,935)
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LOVEJOY ISD 2023-2024
BALANCE SHEET AS OF 1/31/2024
STUDENT NUTRITION FUND

FY23-24 Unaudited Financials: December 31, 2023

	YTD	Ending Balance 6/30/2023	Change
ASSETS			
Cash and Cash Equivalent	\$ 556,641	\$ 665,589	\$ (108,948)
Current Investments	\$ -	\$ -	\$ -
Property Taxes - Delinquent	\$ -	\$ -	\$ -
Allowance for Uncollectible Taxes	\$ -	\$ -	\$ -
Due from Other Government	\$ 0	\$ -	\$ (0)
Due from Other Funds	\$ -	\$ -	\$ -
Inventories	\$ 5,345	\$ 5,345	\$ -
Prepayments	\$ (5,120)	\$ -	\$ 5,120
CURRENT ASSETS	\$ 556,866	\$ 670,934	\$ (103,828)
CAPITAL ASSETS			
Land	\$ -	\$ -	\$ -
Building, Net	\$ -	\$ -	\$ -
Furniture and Equipment, Net	\$ -	\$ -	\$ -
Other Capital Assets, Net	\$ -	\$ -	\$ -
Construction in Progress	\$ -	\$ -	\$ -
Accumulated Depreciation	\$ -	\$ -	\$ -
SUBTOTAL	\$ -	\$ -	\$ -
TOTAL ASSETS	\$ 556,866	\$ 670,934	\$ (114,068)
LIABILITIES			
Accounts Payable	\$ 20	\$ 317	\$ 298
Payroll Deductions and Withholdings	\$ -	\$ -	\$ -
Accrued Wages Payable	\$ 96,411	\$ 74,814	\$ (21,597)
Due to Other Funds	\$ -	\$ -	\$ -
Due to Other Governments	\$ -	\$ -	\$ -
Accrued Expenses	\$ 13,855	\$ 13,325	\$ (530)
Unearned Revenue	\$ 142,546	\$ 112,304	\$ (30,242)
CURRENT LIABILITIES	\$ 252,832	\$ 200,760	\$ (52,071)
LONG TERM LIABILITIES			
Bonds, Notes, Loans, Leases	\$ -	\$ -	\$ -
SUBTOTAL	\$ -	\$ -	\$ -
TOTAL LIABILITIES	\$ 252,832	\$ 200,760	\$ (52,071)
FUND BALANCES			
Restricted: Federal or State Funds	\$ 92,105	\$ 258,244	\$ (166,139)
Restricted Retirement of LT Debt	\$ -	\$ -	\$ -
Construction	\$ -	\$ -	\$ -
Other Committed Fund Balance	\$ -	\$ -	\$ -
Unassigned Fund Balance	\$ 211,930	\$ 211,930	\$ -
SUBTOTAL	\$ 304,034	\$ 470,174	\$ (166,139)
TOTAL LIABILITIES AND FUND BALANCE	\$ 556,866	\$ 670,934	\$ 114,068

**LOVEJOY ISD 2023-2024
BALANCE SHEET AS OF 1/31/2024
DEBT SERVICE FUND**

FY23-24 Unaudited Financials: December 31, 2023

	YTD	Ending Balance 6/30/2023	Change
ASSETS			
Cash and Cash Equivalent	\$ 1,534,790	\$ 626,324	\$ 908,466
Current Investments	\$ 16,567,087	\$ 3,807,228	\$ 12,759,859
Property Taxes - Delinquent	\$ 460,598	\$ 460,598	\$ -
Allowance for Uncollectible Taxes	\$ (4,606)	\$ (4,606)	\$ -
Due from Other Government	\$ -	\$ -	\$ -
Due from Other Funds	\$ -	\$ -	\$ -
Inventories	\$ -	\$ -	\$ -
Prepayments	\$ -	\$ -	\$ -
CURRENT ASSETS	\$ 18,557,869	\$ 4,889,544	\$ 13,668,325
CAPITAL ASSETS			
Land	\$ -	\$ -	\$ -
Building, Net	\$ -	\$ -	\$ -
Furniture and Equipment, Net	\$ -	\$ -	\$ -
Other Capital Assets, Net	\$ -	\$ -	\$ -
Construction in Progress	\$ -	\$ -	\$ -
Accumulated Depreciation	\$ -	\$ -	\$ -
SUBTOTAL	\$ -	\$ -	\$ -
TOTAL ASSETS	\$ 18,557,869	\$ 4,889,544	\$ 13,668,325
LIABILITIES			
Accounts Payable	\$ -	\$ 500	\$ 500
Payroll Deductions and Withholdings	\$ -	\$ -	\$ -
Accrued Wages Payable	\$ -	\$ -	\$ -
Due to Other Funds	\$ -	\$ -	\$ -
Due to Other Governments	\$ 36,257	\$ 36,257	\$ -
Accrued Expenses	\$ -	\$ -	\$ -
Unearned Revenue	\$ 464,797	\$ 286,366	\$ (178,431)
CURRENT LIABILITIES	\$ 501,054	\$ 323,123	\$ (177,931)
LONG TERM LIABILITIES			
Bonds, Notes, Loans, Leases	\$ -	\$ -	\$ -
SUBTOTAL	\$ -	\$ -	\$ -
TOTAL LIABILITIES	\$ 501,054	\$ 323,123	\$ (177,931)
FUND BALANCES			
Restricted: Federal or State Funds	\$ -	\$ -	\$ -
Restricted Retirement of LT Debt	\$ 19,047,723	\$ 5,557,329	\$ 13,490,394
Construction	\$ -	\$ -	\$ -
Other Committed Fund Balance	\$ -	\$ -	\$ -
Unassigned Fund Balance	\$ (990,909)	\$ (990,909)	\$ -
SUBTOTAL	\$ 18,056,815	\$ 4,566,421	\$ 13,490,394
TOTAL LIABILITIES AND FUND BALANCE	\$ 18,557,869	\$ 4,889,544	\$ (13,668,325)

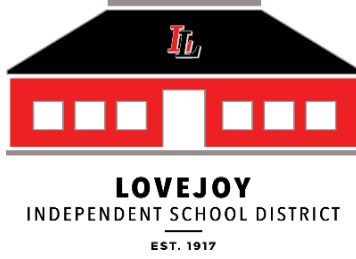
**LOVEJOY ISD 2023-2024
BALANCE SHEET AS OF 1/31/2024
SPECIAL REVENUE FUND**

FY23-24 Unaudited Financials: December 31, 2023

	YTD	Ending Balance 6/30/2023	Change
ASSETS			
Cash and Cash Equivalent	\$ 1,217,198	\$ 1,525,747	\$ (308,549)
Current Investments	\$ -	\$ -	\$ -
Property Taxes - Delinquent	\$ -	\$ -	\$ -
Allowance for Uncollectible Taxes	\$ -	\$ -	\$ -
Due from Other Government	\$ 265,802	\$ 251,446	\$ (14,356)
Due from Other Funds	\$ -	\$ -	\$ -
Inventories	\$ 75,351	\$ 75,351	\$ -
Prepayments	\$ (1,447)	\$ -	\$ 1,447
CURRENT ASSETS	\$ 1,556,903	\$ 1,852,544	\$ (321,459)
CAPITAL ASSETS			
Land	\$ -	\$ -	\$ -
Building, Net	\$ -	\$ -	\$ -
Furniture and Equipment, Net	\$ -	\$ -	\$ -
Other Capital Assets, Net	\$ -	\$ -	\$ -
Construction in Progress	\$ -	\$ -	\$ -
Accumulated Depreciation	\$ -	\$ -	\$ -
SUBTOTAL	\$ -	\$ -	\$ -
TOTAL ASSETS	\$ 1,556,903	\$ 1,852,544	\$ (295,640)
LIABILITIES			
Accounts Payable	\$ 10,580	\$ 8,210	\$ (2,370)
Payroll Deductions and Withholdings	\$ -	\$ -	\$ -
Accrued Wages Payable	\$ 71,926	\$ 63,886	\$ (8,040)
Due to Other Funds	\$ 2,022	\$ 327,677	\$ 325,655
Due to Other Governments	\$ 12,768	\$ 13,909	\$ 1,141
Accrued Expenses	\$ 9,807	\$ 9,073	\$ (734)
Unearned Revenue	\$ 12,562	\$ 12,562	\$ -
CURRENT LIABILITIES	\$ 119,664	\$ 435,317	\$ 315,653
LONG TERM LIABILITIES			
Bonds, Notes, Loans, Leases	\$ -	\$ -	\$ -
SUBTOTAL	\$ -	\$ -	\$ -
TOTAL LIABILITIES	\$ 119,664	\$ 435,317	\$ 315,653
FUND BALANCES			
Restricted: Federal or State Funds	\$ -	\$ -	\$ -
Restricted Retirement of LT Debt	\$ -	\$ -	\$ -
Construction	\$ -	\$ -	\$ -
Other Committed Fund Balance	\$ 1,437,030	\$ 1,417,226	\$ 19,804
Unassigned Fund Balance	\$ -	\$ -	\$ -
SUBTOTAL	\$ 1,437,030	\$ 1,417,226	\$ 19,804
TOTAL LIABILITIES AND FUND BALANCE	\$ 1,556,694	\$ 1,852,544	\$ 295,849

11. Celebration of Learning

Presenter: Dr. Laurie Tinsley, Assistant Superintendent of Curriculum and Instruction



Lovejoy Independent School District Board of Trustees

Date of Meeting	February 26, 2024
Document Title	Celebration of Learning
Presented For	Board Action X Report/Review Only
Supporting Documents	None X Attached Provided Later
Administrator Responsible	Dr. Laurie Tinsley, Assistant Superintendent of Curriculum and Instruction

Executive Summary

This is an opportunity for Lovejoy ISD teachers and administrators to share and celebrate learning that is occurring in LISD schools and classrooms each day. For the month of February, we are spotlighting the use of technology and integration with teaching and learning.

Fiscal Implications

No fiscal implications.

Administrator Recommendation

No administrator recommendation.

District Priority

Priority 1: Lovejoy ISD students will live our Legacy of Excellence by learning at high levels and graduating life ready.

Priority 2: Lovejoy ISD will value employees as our greatest asset in serving students.

Priority 3: Lovejoy ISD will prioritize community, connection, and communication.

Priority 4: Lovejoy ISD will strategically plan for the safety and security of students and staff, financial sustainability, and effective operations.

CELEBRATION OF LEARNING

Dr. Laurie Tinsley

Assistant Superintendent of Curriculum and
Instruction

John Korb

Director of Technology

Dr. Diana Saylak

Instructional Technology Coordinator

February 26, 2024

Board Meeting



LOVEJOY
INDEPENDENT SCHOOL DISTRICT

EST. 1917

Lovejoy ISD

CELEBRATION OF LEARNING

Instructional Technology



2022

New Technology Application TEKS adopted and will be implemented in 2024-2025.



1 ❤️ 1 LOVEJOY

2022-2023

Foundation for Lovejoy Schools awarded over \$90,000 to provide enhancements and materials to support teachers and students.



2023-2024

T-TESS used for appraisals requires the integration of technology to enhance mastery and alignment to instructional purposes.



LOVEJOY



Teachers

Technology tools and resources were introduced to teachers during vertical teams.

Teachers are connecting the Technology Application TEKS to their content TEKS.

1♥1 LOVEJOY

Students

Students were introduced to some of the tools and resources.

Teachers partnered with librarians to share some tools with students.

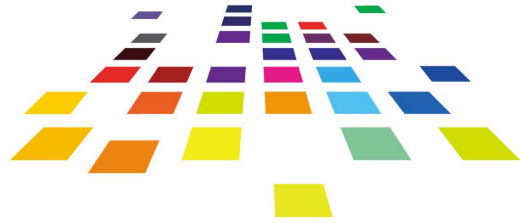
Community

Students were introduced to some of the tools and resources during STEM night at a campus, and during the STEM Festival.

WE ARE LOVEJOY



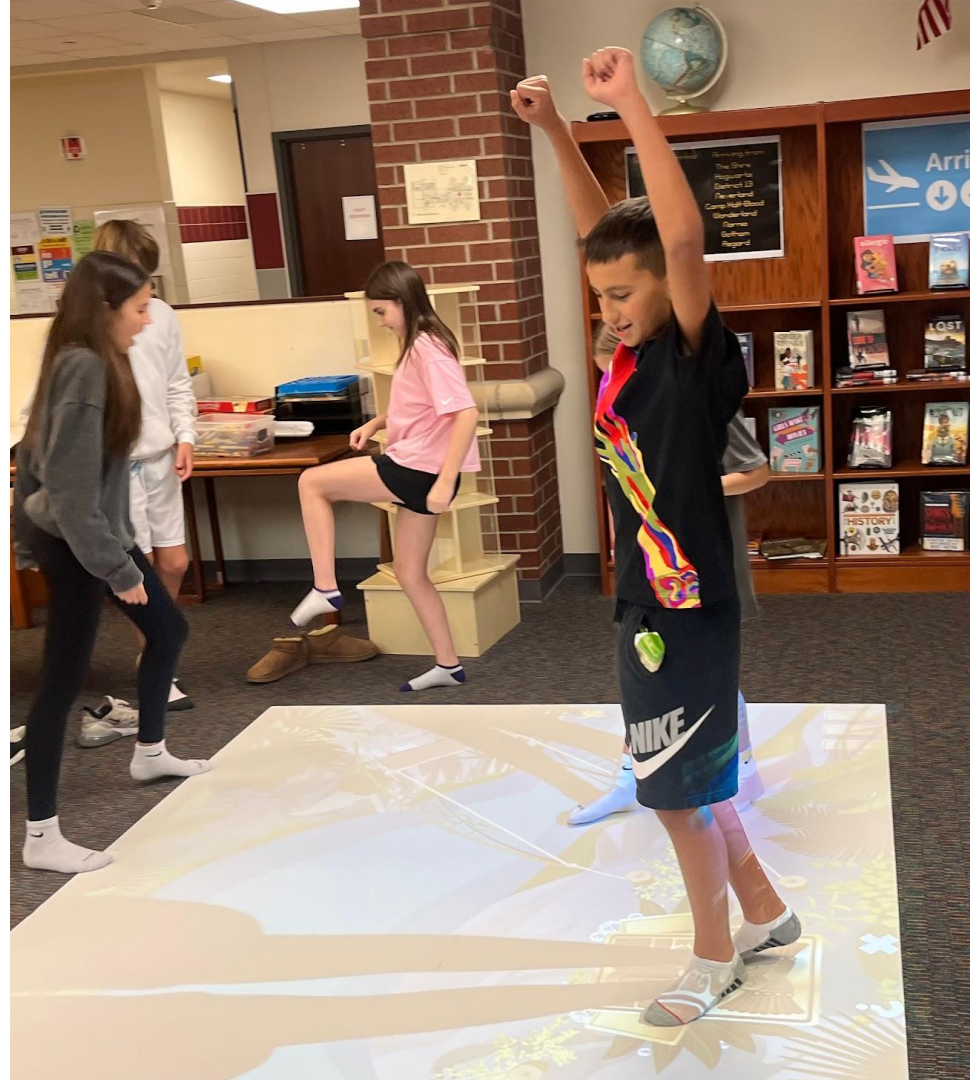




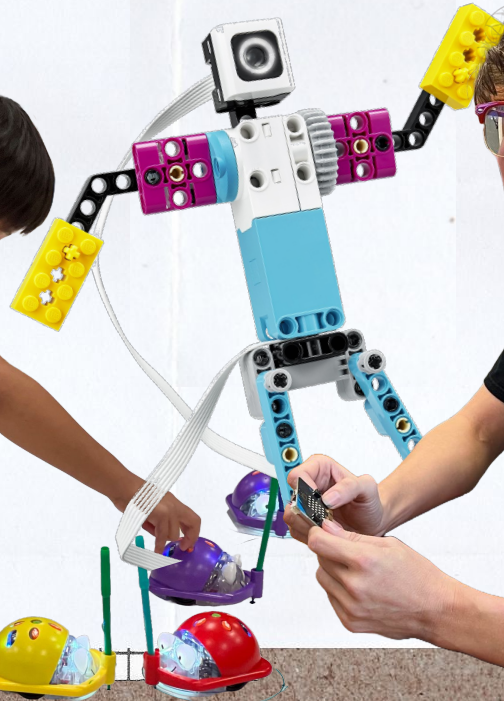
ACTIVE FLOOR

Jump 'n' Learn

Emily Peabody & Kirsten Cermak
Willow Springs Middle School



Thank You



LOVEJOY

12. Presentation: Living Lovejoy: Who We Are

Presenter: Katie Kordel, Superintendent and Anna Koenig, Executive Director of Human Resources and Communications



LOVEJOY
 INDEPENDENT SCHOOL DISTRICT
 EST. 1917

Lovejoy Independent School District Board of Trustees

Date of Meeting	February 26, 2024
Document Title	Living Lovejoy - Who We Are
Presented For	Board Action <input type="checkbox"/> Report/Review Only <input checked="" type="checkbox"/>
Supporting Documents	None Attached <input checked="" type="checkbox"/> Provided Later
Administrator Responsible	Anna Koenig, Executive Director of Human Resources and Communications



Executive Summary

Our new **Living Lovejoy-Who We Are** publication that encapsulates Lovejoy ISD’s mission, values, achievements and offerings in a concise and compelling manner will be shared. This comprehensive guide captures all things Lovejoy.

Fiscal Implications

N/A

Administrator Recommendation

Report/Review Only. No administrator recommendation.

District Priority

- Priority 1:** Lovejoy ISD students will live our Legacy of Excellence by learning at high levels and graduating life ready.
- Priority 2:** Lovejoy ISD will value employees as our greatest asset in serving students.
- Priority 3:** Lovejoy ISD will prioritize community, connection, and communication.
- Priority 4:** Lovejoy ISD will strategically plan for the safety and security of students and staff, financial sustainability, and effective operations.



13. Consider and Act on the Use of Bond Funds

Presenter: Thomas Willman, Chief Financial Officer and Kyle Pursifull, Executive Director of District Support Services



LOVEJOY
INDEPENDENT SCHOOL DISTRICT
EST. 1917

Lovejoy Independent School District Board of Trustees

Date of Meeting	February 26, 2024
Document Title	Consider and Act on the Use of Bond Funds
Presented For	X Board Action Report/Review Only
Supporting Documents	None X Attached Provided Later
Administrator Responsible	Kyle Pursifull, Executive Director of District Support Services



Executive Summary

Campus and District staff consistently review safety, security, and maintenance needs throughout the District and work to identify areas for improvement opportunities. After identifying the areas mentioned below, a scope of proposed work was developed. Quotes have been obtained from multiple vendors to provide pricing on the proposed improvements.

The replacement of 2 failed commercial hot water heaters at Lovejoy High School. This project is projected to cost \$19,000 utilizing Johnson-Burkes Supply CO., INC.

Concrete improvements at the main entrance of Puster Elementary School. This project is projected to cost \$6,100 utilizing Holley & Holley Concrete CO., INC.

Repairs to the Natatorium roof material and seams. This project is projected to cost \$31,000, utilizing Arizona Building Systems.

The addition of a security vestibule at the main entrance of the administration building. This project is projected to cost \$50,000 utilizing Sports Facilities Construction Company.

Quotes were received from multiple vendors that were available on Job Order Contracts via purchasing cooperatives.

Fiscal Implications

The total projected cost of all projects is \$106,100 and would be funded utilizing Bond funds.

Administrator Recommendation

It is the recommendation of the administration that the Board of Trustees approve the safety and security-related projects as presented in an amount not to exceed \$107,000.00 of bond funds.

District Priority

Priority 1: Lovejoy ISD students will live our Legacy of Excellence by learning at high levels and graduating life ready.

Priority 2: Lovejoy ISD will value employees as our greatest asset in serving students.

Priority 3: Lovejoy ISD will prioritize community, connection, and communication.

Priority 4: Lovejoy ISD will strategically plan for the safety and security of students and staff, financial sustainability, and effective operations.

Consider and Act on the Use of Bond Funds

Kyle Pursifull

Executive Director of District Support Services

Thomas Willman

Chief Financial Officer

February 26, 2024

Board Meeting



LOVEJOY ISD

Safety, Security &

Maintenance

Improvement

Projects

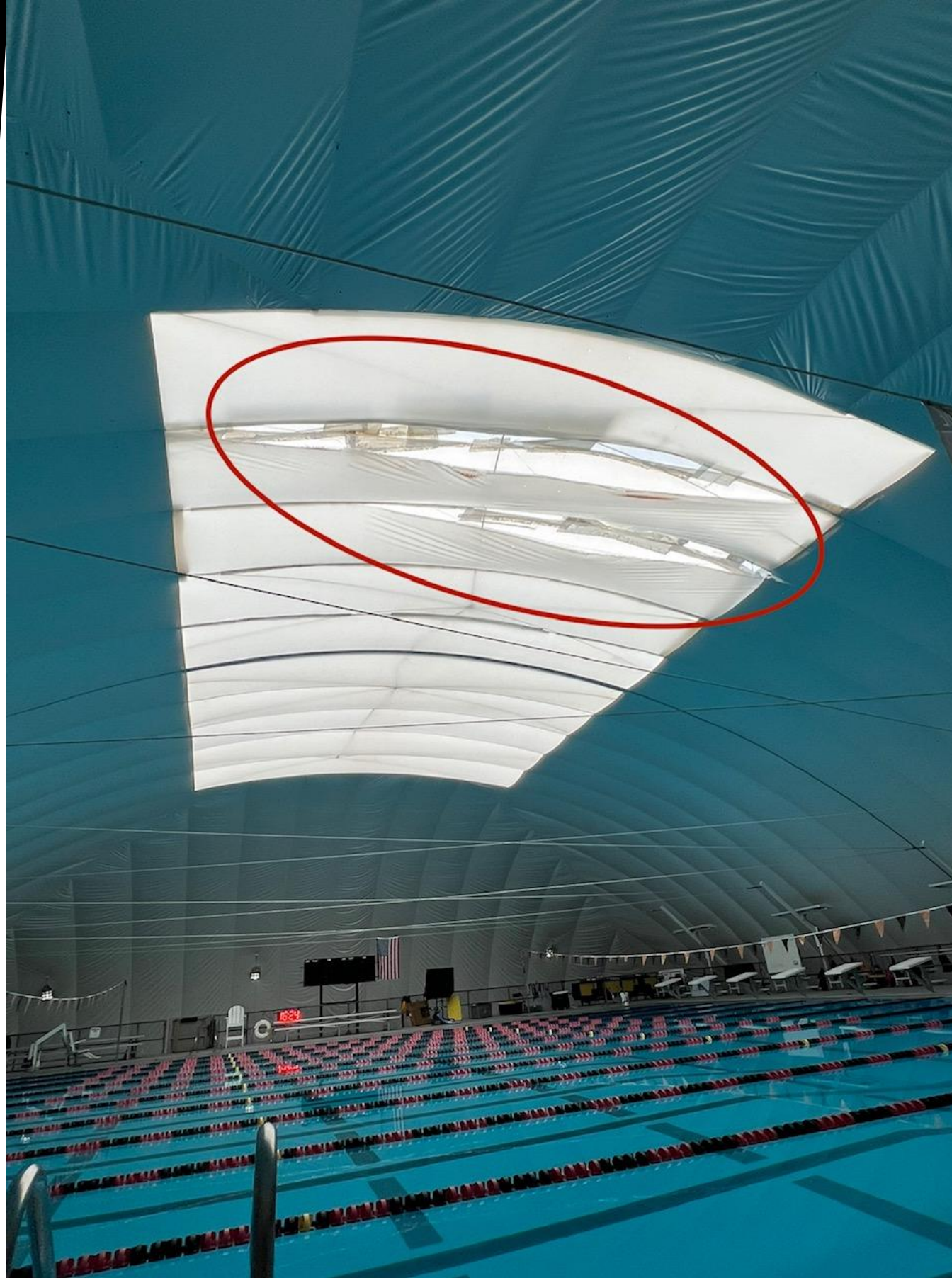
Lovejoy High School Hot Water Heater Replacement





**Puster
Elementary
Concrete
improvements
at the main
entrance**

Natatorium Roof Repairs



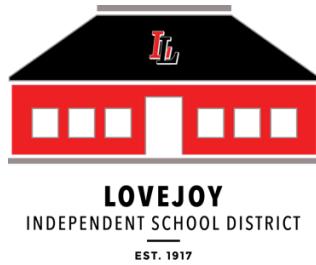


**Construction of a
Security
Vestibule at the
main entrance of
the
Administration
Building**

QUESTIONS?



14. Presentation: Bond Program Update and Plan of Finance for Final Installment of 2014
Bond Authorization
Presenter: Thomas Willman, Chief Financial Officer



Lovejoy Independent School District Board of Trustees

Date of Meeting	February 26, 2024
Document Title	Bond Program Update and Plan of Finance for Final Installment of 2014 Bond Authorization
Presented For	Board Action X Report/Review Only
Supporting Documents	None X Attached Provided Later
Administrator Responsible	Thomas Willman, Chief Financial Officer
Executive Summary	
<p>The district has \$9.5 million remaining from the 2014 bond authorization. This presentation is to provide an update on the bond program and the plan of Finance for the final installment. These funds will address needs at each of our campuses such as mechanical system replacements, security camera system upgrades, concrete repairs and improvements, and safety and security improvements.</p> <p>The district anticipates ending the year with over \$9.6 million in fund balance without paying down principal on callable bonds. Part of the finance plan is to use \$6.8 million to redeem a portion of the series 2014 bonds. The remaining fund balance needs to remain in place to ensure that enough cash is available for the district's August 2024 payment.</p>	
Fiscal Implications	
Issuance of the remaining \$9.5 million in bonds from the 2014 bond authorization.	
Administrator Recommendation	

This is the presentation only. The administration will bring forward a recommendation for the board to consider and act at the March regular meeting.

District Priority

Priority 3: Lovejoy ISD will prioritize community, connection, and communication.

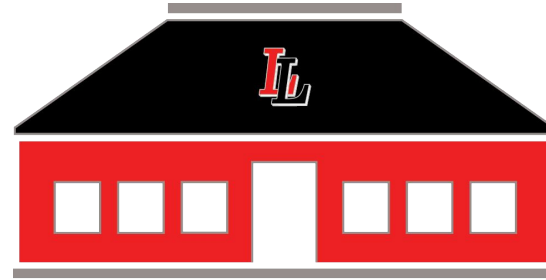
Priority 4: Lovejoy ISD will strategically plan for the safety and security of students and staff, financial sustainability, and effective operations.

Bond Program Update and Plan of Finance for Final Installment of 2014 Bond Authorization

Thomas Willman
Chief Financial Officer

Douglas Whitt

February 26, 2024



LOVEJOY
INDEPENDENT SCHOOL DISTRICT
EST. 1917

Interest and Sinking (I&S) Tax

Funds debt repayment for “big ticket” items that have more than a year of useful life:

- New building construction
- Existing building renovations
- Land purchases
- Program specific equipment (band instruments, athletic equipment, etc)
- Technology
- School Buses

**For the average citizen
this is similar to:**

- ✓ **New home purchases**
- ✓ **House renovation**
- ✓ **Land for a home**
- ✓ **New Appliances**
- ✓ **New home computer**
- ✓ **New Car**



Use of Final \$9.5 million installment of the 2014 Bonds

- **Mechanical System Replacements**
- **Security Camera System Upgrades**
- **Concrete Repairs and Improvements**
- **Safety and Security Improvements**
- **Technology Upgrades and Improvements**



LOVEJOY INDEPENDENT SCHOOL DISTRICT

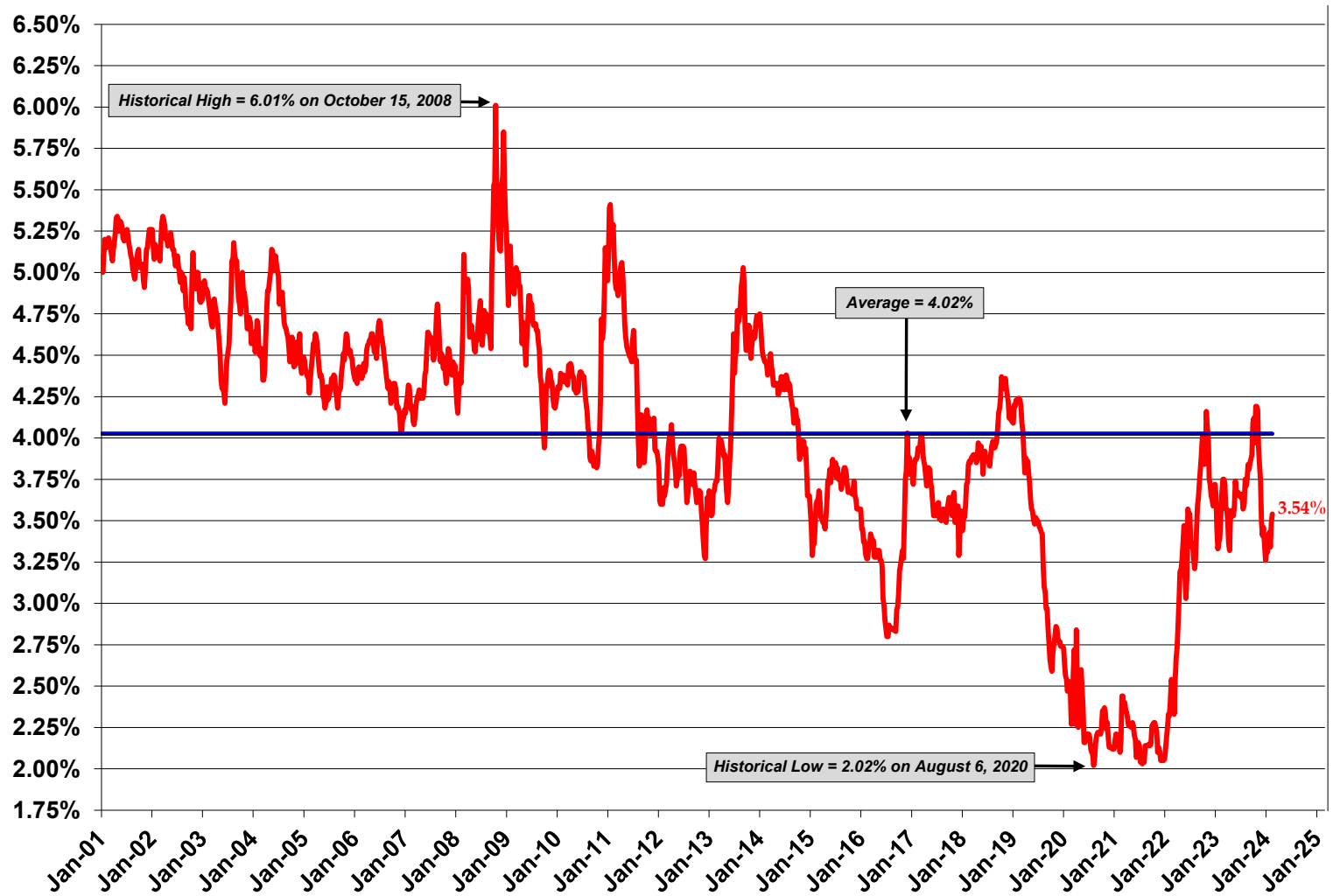
Bond Program Update and Early Redemption Plan

February 26, 2024



BOND BUYERS INDEX OF MUNICIPAL BONDS

January 2001 - February 2024



Current Bond Market Conditions

PSF – AAA Rates

Maturity Length	Coupon Rate	Yield to Call*	Yield to Maturity
5-Year	5.00%	N/A	2.70%
10-Year	5.00%	N/A	2.80%
15-Year	5.00%	3.20%	3.74%
20-Year	5.00%	3.60%	4.17%
25-Year	5.00%	3.80%	4.39%
30-Year	5.00%	3.90%	4.47%

*Assumes 10-Year Call Feature

Credit Ratings

Moody's Investors Service

- “Aaa” Based on the Permanent School Fund Guarantee
- “Aa2” Underlying Credit Rating Affirmed

S&P Global Ratings

- “AAA” Based on the Permanent School Fund Guarantee
- “AA-” Underlying Credit Rating Affirmed

Analysts Cite

- Strong Wealth and Income Indices
- Strong Tax Base Growth
- Historically Stable Financial Profile with Strong Reserves
- Moderately High Principal Outstanding to Assessed Value Ratio

Rating Category

- High Investment Grade

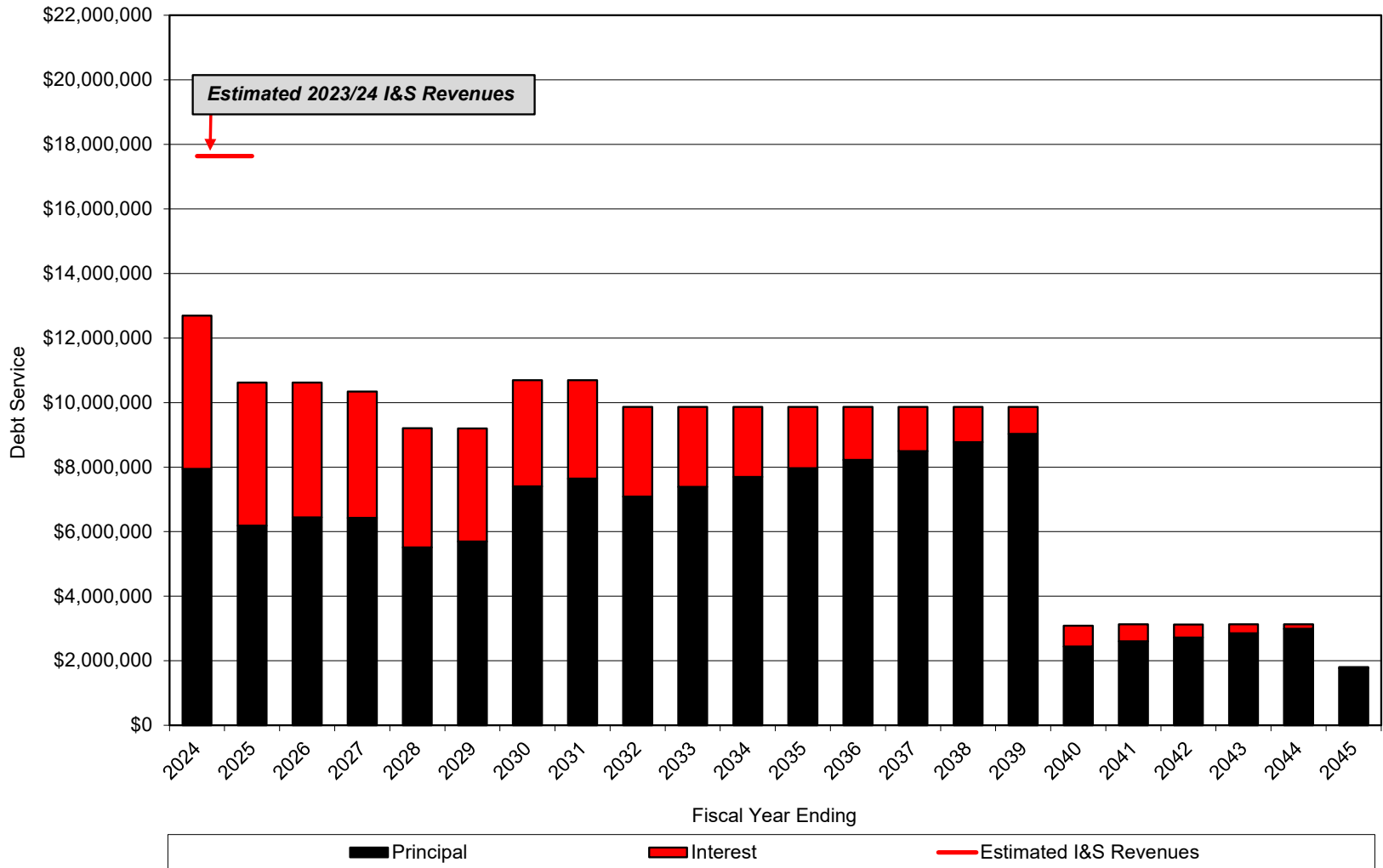
Historical Statistics

(1)	(2)	(3)	(4)	(5)	(6)	(7)
Fiscal Year	Net Taxable Value	Taxable Value Growth	M&O Tax Rate	I&S Tax Rate	Total Tax Rate	I&S Fund Balance (8/31 Basis)
2013/14	\$ 1,673,732,287		\$ 1.0600	\$ 0.4750	\$ 1.5350	\$ 1,865,200
2014/15	\$ 1,838,815,243	\$ 165,082,956	\$ 1.0600	\$ 0.5000	\$ 1.5600	\$ 2,312,211
2015/16	\$ 1,972,376,423	\$ 174,618,550	\$ 1.0600	\$ 0.5000	\$ 1.5600	\$ 2,680,729
2016/17	\$ 2,159,604,793	\$ 187,228,370	\$ 1.1700	\$ 0.5000	\$ 1.6700	\$ 2,291,666
2017/18	\$ 2,374,510,642	\$ 214,905,849	\$ 1.1700	\$ 0.5000	\$ 1.6700	\$ 1,481,452
2018/19	\$ 2,596,097,373	\$ 221,586,731	\$ 1.1700	\$ 0.5000	\$ 1.6700	\$ 2,472,464
2019/20	\$ 2,796,984,882	\$ 200,887,509	\$ 1.0684	\$ 0.5000	\$ 1.5684	\$ 2,614,717
2020/21	\$ 2,885,658,652	\$ 88,673,770	\$ 1.0547	\$ 0.5000	\$ 1.5547	\$ 1,560,512
2021/22	\$ 3,104,960,543	\$ 219,301,891	\$ 1.0050	\$ 0.5000	\$ 1.5050	\$ 1,800,227
2022/23	\$ 3,578,277,549	\$ 542,226,398	\$ 0.9429	\$ 0.5000	\$ 1.4429	\$ 2,103,611
2023/24	\$ 3,596,831,811	\$ 299,328,153	\$ 0.7575	\$ 0.5000	\$ 1.2575	

Note: The taxable value reflects the increase in the homestead exemptions, and the growth statistics reflect the change on an "apples to apples" basis.



Outstanding Principal & Interest



Outstanding Debt Service

(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)
Fiscal Year Ending (Aug 31)	Series 2013 Refunding PSF Guaranteed (Any Date)	Series 2014 Bldg & Ref PSF Guaranteed (Any Date)	Series 2015 Refunding PSF Guaranteed (2/15/2025)	Series 2015 Building PSF Guaranteed (2/15/2025)	Series 2016 Refunding PSF Guaranteed (2/15/2026)	Series 2017 Building PSF Guaranteed (2/15/2027)	Series 2018 Bldg & Ref PSF Guaranteed (2/15/2028)	Series 2019 Building PSF Guaranteed (2/15/2029)	Series 2019 Refunding PSF Guaranteed (8/15/2029)	Series 2021 Bldg & Ref PSF Guaranteed (8/15/2031)	Total Outstanding Voted Bond Debt Service
2024	\$ 1,388,718.76	\$ 638,612.50	\$ 1,821,675.00	\$ 1,001,368.76	\$ 2,556,612.50	\$ 790,250.00	\$ 232,950.00	\$ 640,700.00	\$ 180,643.76	\$ 3,441,175.00	\$ 12,692,706.28
2025	1,398,768.76	633,512.50	1,843,800.00	1,005,918.76	2,515,487.50	785,250.00	233,375.00	648,050.00	180,643.76	1,376,300.00	10,621,106.28
2026	1,405,368.76	633,337.50	1,964,050.00	1,007,518.76	2,356,612.50	784,750.00	263,200.00	649,918.75	180,643.76	1,374,800.00	10,620,200.03
2027	1,138,359.38	633,012.50	1,987,050.00	1,005,843.76	2,319,987.50	783,650.00	267,350.00	645,825.00	180,643.76	1,381,050.00	10,342,771.90
2028		637,343.75	2,095,825.00	1,001,143.76	2,175,362.50	786,850.00	295,825.00	645,750.00	180,643.76	1,384,450.00	9,203,193.77
2029		631,287.50	2,648,650.00	1,005,671.88	2,132,987.50	784,350.00	426,675.00	650,150.00	180,643.76	735,700.00	9,196,115.64
2030		639,868.75	3,931,625.00	1,004,012.50	1,991,562.50	786,150.00	774,950.00	649,025.00	180,643.76	733,050.00	10,690,887.51
2031		637,993.75	4,070,150.00	1,006,462.50	1,818,462.50	787,150.00	806,925.00	652,375.00	180,643.76	731,675.00	10,691,837.51
2032		650,425.00		732,450.00	4,647,412.50	782,450.00		369,475.00	1,554,718.76	1,128,200.00	9,865,131.26
2033		652,200.00		732,125.00	4,646,537.50	782,050.00		370,475.00	1,951,193.76	727,475.00	9,862,056.26
2034		653,625.00		726,537.50	4,646,162.50	785,750.00		371,175.00	1,948,565.63	731,000.00	9,862,815.63
2035		652,750.00		730,600.00	4,648,487.50	783,550.00		366,650.00	1,956,768.75	724,225.00	9,863,031.25
2036		654,375.00		726,750.00	4,648,750.00	785,450.00		371,825.00		2,677,450.00	9,864,600.00
2037		650,375.00		729,750.00	4,647,265.63	781,450.00		371,625.00		2,684,550.00	9,865,015.63
2038		650,750.00		731,750.00	4,646,484.38	788,125.00		366,200.00		2,682,200.00	9,865,509.38
2039		1,308,500.00		1,347,000.00		429,250.00		370,475.00		6,408,450.00	9,863,675.00
2040		1,312,625.00		1,344,750.00		428,375.00					3,085,750.00
2041		1,333,500.00		1,365,200.00		431,625.00					3,130,325.00
2042		1,331,125.00		1,363,700.00		429,000.00					3,123,825.00
2043		1,330,875.00		1,370,200.00		430,500.00					3,131,575.00
2044		1,332,500.00		1,369,600.00		431,000.00					3,133,100.00
2045				1,371,900.00		430,500.00					1,802,400.00
	<u>\$ 5,331,215.66</u>	<u>\$ 17,598,593.75</u>	<u>\$ 20,362,825.00</u>	<u>\$ 22,680,253.18</u>	<u>\$ 50,398,175.01</u>	<u>\$ 14,787,475.00</u>	<u>\$ 3,301,250.00</u>	<u>\$ 8,139,693.75</u>	<u>\$ 8,856,396.98</u>	<u>\$ 28,921,750.00</u>	<u>\$ 180,377,628.33</u>

Blue shading represents candidates for potential redemption in May 2024.

Yellow shading represents candidates for potential Redemption in 2024/25 pending a May 2025 election with New Money Debt Service to begin in 2025/26.



Authorized But Unissued

	<u>Total</u>	<u>Amount from Proposition 1</u>	<u>Amount from Proposition 2</u>
Amount of Total Bonds Authorized	\$ 75,750,000	\$ 46,250,000	\$ 29,500,000
Less: Amount Issued as Series 2014 Bonds	\$ 15,000,000	\$ 15,000,000	\$ -
Less: Amount Issued as Series 2015 Bonds	\$ 18,000,000	\$ 15,000,000	\$ 3,000,000
Less: Amount Issued as Series 2017 Bonds	\$ 15,000,000	\$ -	\$ 15,000,000
Less: Amount Issued as Series 2018 Bonds	\$ 3,500,000	\$ 2,600,000	\$ 900,000
Less: Amount Issued as Series 2019 Bonds	\$ 9,750,000	\$ 7,960,000	\$ 1,790,000
Less: Amount Issued as Series 2021 Bonds	\$ 5,000,000	\$ 600,000	\$ 4,400,000
Authorized But Unissued	\$ 9,500,000	\$ 5,090,000	\$ 4,410,000

Approaching Optional Redemption Dates

<u>Series</u>	<u>Amount</u>	<u>Maturities</u>	<u>Call Date</u>	<u>Callable Interest Rates</u>	<u>Available to Refund on Tax-Exempt Basis</u>
■ 2013 Refunding*	\$ 3,750,000	2025-2029	Any Date	2.00% - 3.75%	Any Date
■ 2014 Bldg & Ref	\$10,025,000	2025-2044	Any Date	3.00% - 5.00%	Any Date
■ 2015 Refunding	\$14,990,000	2026-2031	Feb. 15, 2025	3.00% - 5.00%	Oct. 2024
■ 2015 Building	\$13,600,000	2026-2045	Feb. 15, 2025	3.00% - 5.00%	Oct. 2024
■ 2016 Refunding	\$33,395,000	2027-2038	Feb. 15, 2026	3.00% - 5.00%	Oct. 2025

** Reflects the early cash redemption of a portion of the 2027 maturity, and the full 2028-2029 maturities in the aggregate amount of \$3,200,000 on February 15, 2023.*

Early Redemption Plan & Preliminary Bond Program Analysis

Scenario:

Issuance of \$9.5MM from the May 2014 Authorization + Early Redemption of a Portion of the Series 2014 Bonds

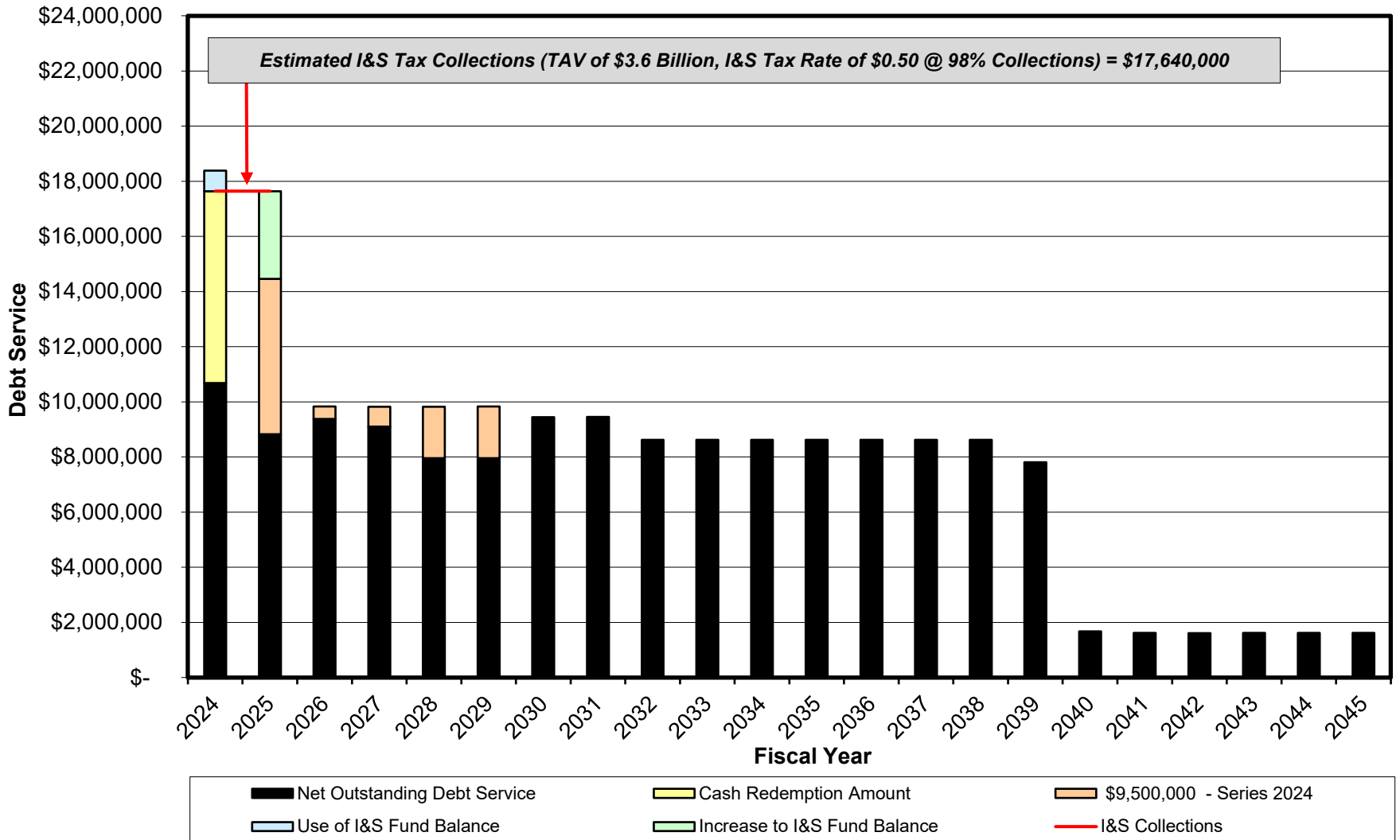
Summary of Redemption Parameters:

Redemption Date of the Bonds:	May 15, 2024
Maturities Subject to Redemption:	2025-2044
Maturities to be Redeemed:	2039-2044
Amount Subject to Redemption:	\$10,025,000
Amount to be Redeemed:	\$ 6,865,000
Interest Rate on Bonds to be Redeemed:	5.00%
Call Premium/Penalty:	None
Net Interest Cost Savings:	\$5,969,717

Summary of New Money Parameters:

Issuance Date:	Assumed to be May 2024
Amortization:	Assumed to be 5 Years (\$5,165,000 of Principal in Year 1)
Interest Rate:	Assumed to be 5.00%
Collection Percentage:	Assumed to be 98%
Taxable Value:	Assumed to be \$3.6B in 2023/24 with No Growth Thereafter
I&S Tax Rate:	Remain at 50.00¢





Preliminary Schedule of Events

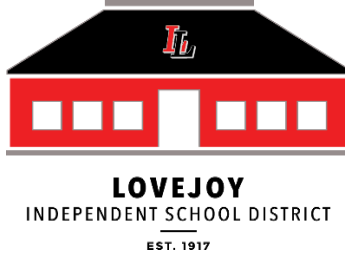
- **February 26, 2024** – Bond Program Update and Review the Plan of Finance for Final Installment of 2014 Bond Authorization
- **March 25, 2024** – Adopt an Order Authorizing the Issuance of School Building Bonds with Delegated Authority and Adopt a Resolution Calling for Early Redemption of Certain Bond Maturities
- **March 28, 2024** – Conference Calls – Rating Agency Interview & Tax Compliance
- **April 16, 2024** – Bond Sale (Lock in Interest Rate)
- **May 15, 2024** – Bond Closing (Transfer of Funds to the Construction/Acquisition Fund) & Early Redemption of Certain Maturities of the Series 2014 Bonds (Transfer of Funds from the I&S Fund)



THANK YOU

15. Presentation: Capital Planning Committee Update

Presenter: Kyle Pursifull, Executive Director District Support Services and Thomas Willman, Chief Financial Officer



Lovejoy Independent School District Board of Trustees

Date of Meeting	February 26, 2024
Document Title	Capital Planning Committee Update
Presented For	Board Action X Report/Review Only
Supporting Documents	None X Attached Provided Later
Administrator Responsible	Kyle Pursifull, Executive Director of District Support Services



Executive Summary

An update on the Capital Planning Committee will be provided. On Thursday, February 15, 2024, the Capital Planning Committee held their second meeting. The Committee visited two campuses, Hart and Puster Elementary Schools, which included thorough walkthroughs of the facilities, SWOT analysis, and strategic input. The Capital Planning Committee will continue to effectively balance the District's identified capital needs and long-term financial decision making in order to achieve Lovejoy ISD's mission and commitment to the Lovejoy experience.

Fiscal Implications

N/A

Administrator Recommendation

N/A

District Priority

Priority 1: Lovejoy ISD students will live our Legacy of Excellence by learning at high levels and graduating life ready.

Priority 2: Lovejoy ISD will value employees as our greatest asset in

serving students.

Priority 3: Lovejoy ISD will prioritize community, connection, and communication.

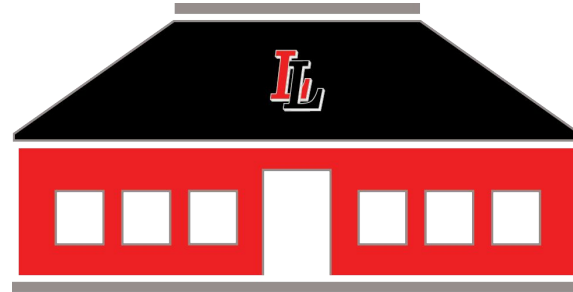
Priority 4: Lovejoy ISD will strategically plan for the safety and security of students and staff, financial sustainability, and effective operations.

Capital Planning Committee Update

Kyle Pursifull
Executive Director of District Support
Services

Thomas Wilman
Chief Financial Officer

February 26, 2024
Board Meeting



LOVEJOY
INDEPENDENT SCHOOL DISTRICT

EST. 1917

Capital Planning Committee



District Priorities for 2023-2024

01. Lovejoy ISD students will live our Legacy of Excellence by learning at high levels and graduating life ready.
02. Lovejoy ISD will value employees as our greatest asset in serving students.
03. Lovejoy ISD will prioritize community, connection, and communication.
04. Lovejoy ISD will strategically plan for the safety and security of students and staff, financial sustainability, and effective operations.

Capital Planning Committee



Purpose

Develop a clear vision for Lovejoy ISD's physical learning environments and capital assets including capital planning priorities, timeline, and financial implications. The Capital Planning Committee will study District capital needs and recommend priorities for a possible future bond election.

Capital Planning Committee

January Meeting



Capital Planning Committee



February Meeting



Capital Planning Committee



Next Steps

Committee Meetings (Spring of 2024):

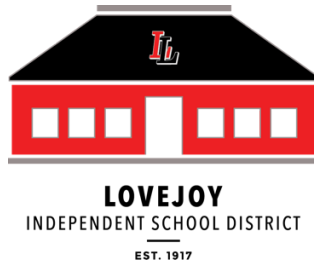
- School Finance (I&S) and Bonds
- Facilities Assessment
- Demographic Trends
- Tours of Lovejoy ISD Schools and Facilities
- Tours of Schools and Facilities in other Districts
- Vision for Physical Learning Environments
- Capital Needs
- Capital Planning Priorities



THANK YOU

16. Budget Workshop #3

Presenter: Thomas Willman, Chief Financial Officer, Dr. Laurie Tinsley, Assistant Superintendent of Curriculum and Instruction, and Anna Koenig, Executive Director of Human Resources and Communications



Lovejoy Independent School District Board of Trustees

Date of Meeting	February 26, 2024
Document Title	Budget Workshop #3
Presented For	Board Action X Report/Review Only
Supporting Documents	None X Attached Provided Later
Administrator Responsible	Thomas Willman, Chief Financial Officer



Executive Summary

The Budget Workshop is designed for review of the current year budget projections and development of the 2024-2025 budget. Budget Workshops support development of the 2024-2025 budget for Board approval in June.

Fiscal Implications

Ongoing development of 2024-2025 budget.

Administrator Recommendation

This is a presentation.

District Priority

Priority 2: Lovejoy ISD will value employees as our greatest asset in serving students.

Priority 3: Lovejoy ISD will prioritize community, connection, and communication.

Priority 4: Lovejoy ISD will strategically plan for the safety and security of students and staff, financial sustainability, and effective operations.

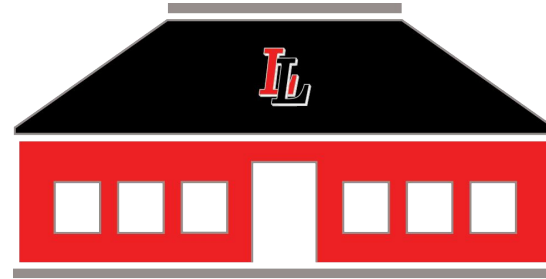
2024-2025 Budget Development Workshop #3

Thomas Willman
Chief Financial Officer

Dr. Laurie Tinsley
Assistant Superintendent of Curriculum and Instruction

Anna Koenig
Executive Director of Communications and Human Resources

February 26, 2024



LOVEJOY
INDEPENDENT SCHOOL DISTRICT

EST. 1917

AGENDA

- Critical Factors Influencing the Budget
- 2024 - 2025 Budget Discussion
- Financial Model Review





Critical Factors Influencing Budget

STATE SCHOOL FUNDING FORMULA

TIER I-BASIC FUNDING PER
STUDENT IN AVERAGE DAILY
ATTENDANCE (includes Basic
Allotment + all supplemental
state funding)

- Statewide Average = \$9,043
- Area Average = \$9,106
- Lovejoy ISD = \$7,561



The Inflation Funding Gap

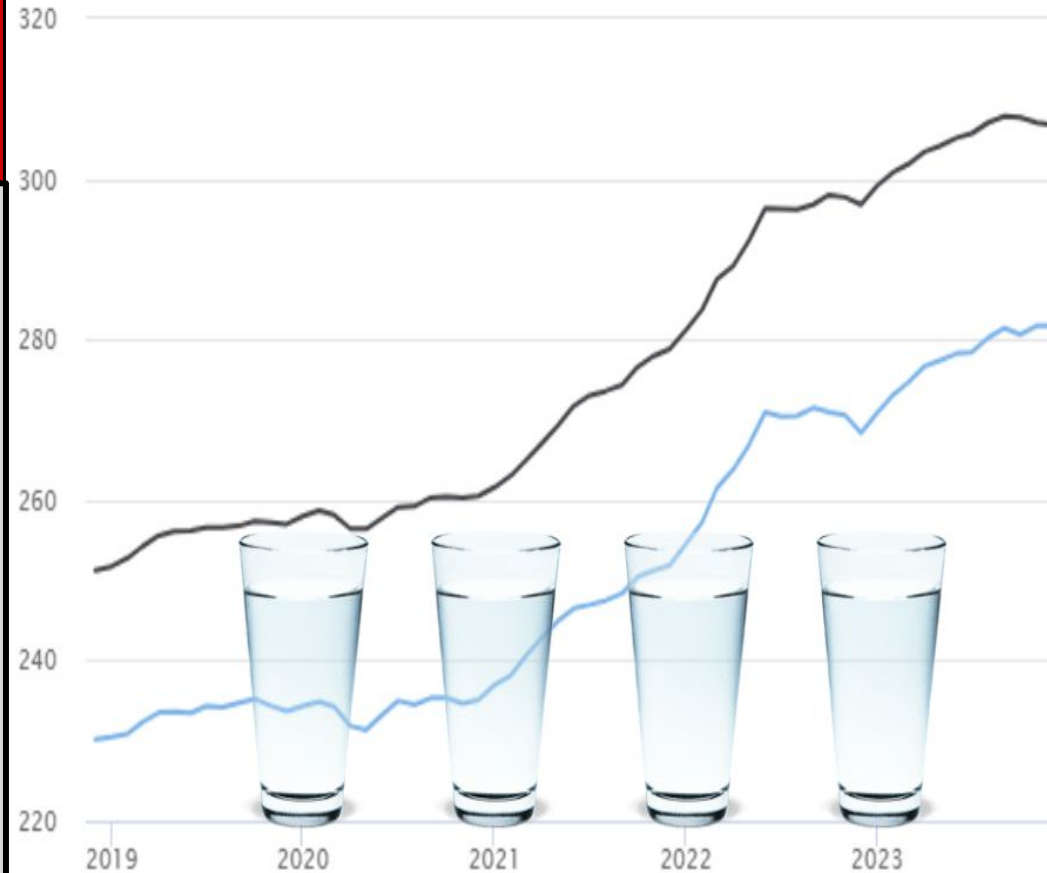
As inflation, property value, and taxes increase, school funding per student remains flat.

Since 2019, the rate of inflation has increased by 20%. 2019 is the last time Texas school funding formulas were adjusted.

An increase to the Basic Allotment for estimated inflation from 2019 is \$1,150. This would mean an estimated \$4.9 million increase.

Legend/Change from previous year:

— CPI TX: 5.0% — CPI US: 3.4%



*Excluding food and energy

Source: US Bureau of Labor Statistics and Comptroller of Public Accounts, based on data provided by Bureau of Labor Statistics



OTHER FACTORS INFLUENCING THE BUDGET



The Economy

Inflation, teacher shortage, and other economic factors like rising insurance premiums have put a strain on the operating budget.



The Texas Legislature

The state had a record surplus of \$37.2 billion, however an adjustment to the basic allotment has not been made since 2019.

OTHER FACTORS INFLUENCING THE BUDGET



Enrollment

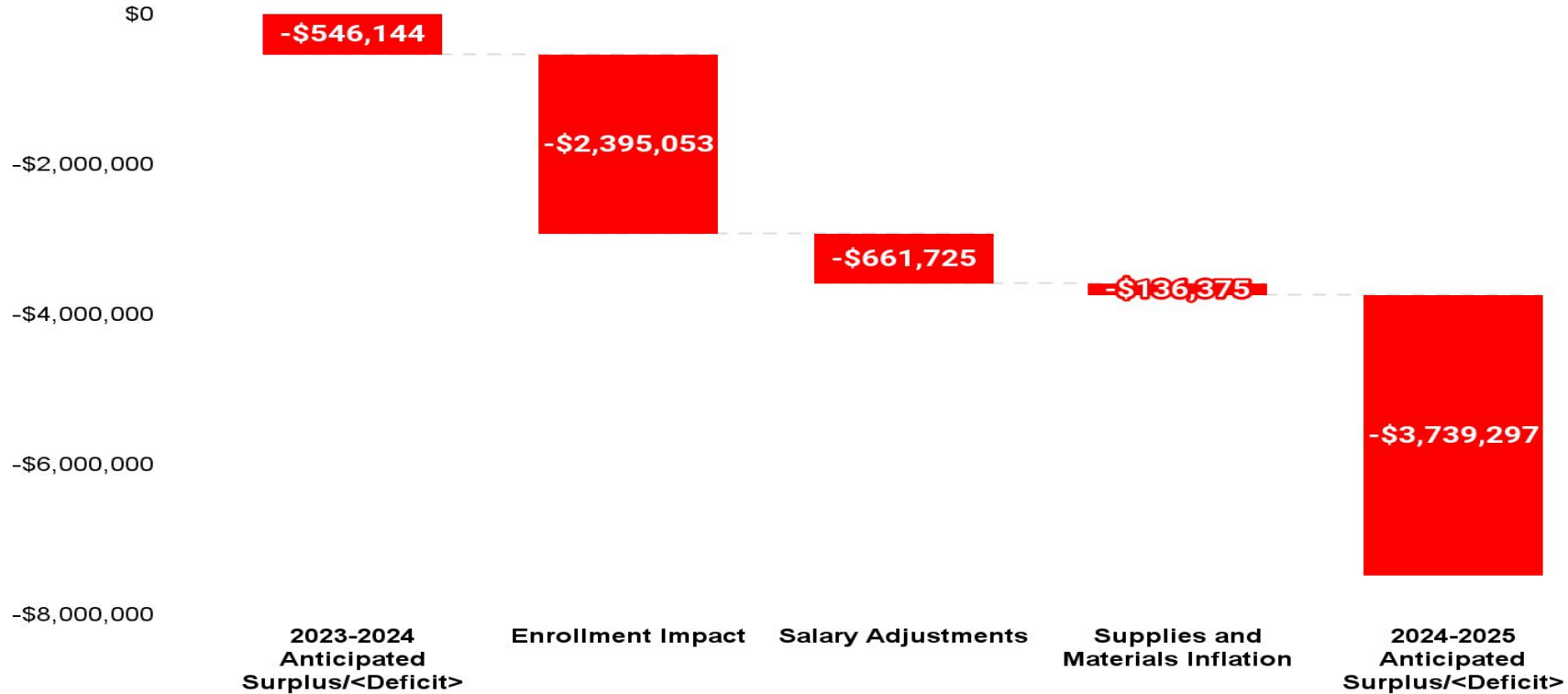
Enrollment continues to decline. Lovejoy ISD local resident enrollment has declined by more than 300 since 2020.



Attendance

Our attendance rate has decreased since COVID which is in line with the state-wide trend. State-wide the attendance rate is down more than 3%. District-wide attendance is down more than 2%.

Financial Impacts from the Factors



Strategic Actions: Financial Efficiency and Organizational Effectiveness



2020-2021

- **Ending General Fund Balance was 76 Days**
- **Return to classroom from COVID**
- **Financially, Districts held harmless for attendance drops**
- **Limited Stimulus Funds began to flow : ESSER Supplemental Only**
- **Repurposing of Lovejoy Elementary School to Childcare Development Center**
- **Reduction in Force (RIF)**

2021-2022

- Staffing Efficiency Study
- Zero-Based Budgeting
- Demographic Study
- Restored Fund balance through effective use of grants. (ESSER Supplemental, TCLAS, Etc)
- Central Office Restructuring & Reorganization
- Restored Fund Balance: surplus of \$2.4m & ending General Fund Balance of 103 Days
- Implementation of multi-year financial model
- Updated Demographer report
- Program Restructuring

2022-2023

- **Significant Increase in Inflation**
- **Zero-Based Budgeting**
- **VATRE (not approved by voters)**
- **Legislative Engagement**
- **No increase to the basic allotment after 4 special Legislative sessions**
- **Increased School Based resources**
- **Restored Fund balance: year end surplus of \$5.2m and ending General Fund Balance of 158 Days**
- **Use of Attrition to Reduce and Scale Staffing**

2023-2024

- Change to TEA's Student Attendance Accounting Handbook (Tuition)
- First year of the past three with an anticipated deficit budget
- Stimulus Funds End
- Increased School Based Resources (personnel, Instructional materials, and technology)
- Reduction in Force (RIF)
- Improved efforts in retention and recruitment through compensation increase.
- Use of Attrition to Reduce and Scale Staffing
- Demographic Study



2024 - 2025 Budget Discussion

Current Financial Model - No Changes



Projection as of 1/19/2024

	FINAL ACTUAL		PROJECTED BUDGETS	
	FY23	FY24	FY25	FY26
Student Enrollment	4,210	4,025	3,730	3,340
Increase/(Decrease)	(174)	(185)	(296)	(390)
Average Daily Attendance (ADA) (Actual, '21-'22 TPAR was 4,173)	4,020	3,850	3,567	3,195
Attendance Rate	95.5%	95.6%	95.6%	95.6%
State Certified Property Value ("T2" value) @ \$100K Exemption	\$ 3,569,852,514	\$ 3,826,754,786	\$ 4,385,837,159	\$ 5,017,600,239
% Increase Property Value	15.2%	7.2%	14.6%	14.4%
Maintenance & Operations (M&O) Tax Rate	\$ 0.9429	\$ 0.7575	\$ 0.6914	\$ 0.6893
Interest & Sinking (I&S) Tax Rate	\$ 0.5000	\$ 0.5000	\$ 0.5000	\$ 0.5000
Total Tax Rate	\$ 1.4429	\$ 1.2575	\$ 1.1914	\$ 1.1893
Excess Revenue (Recapture)	\$ 1,349,437	\$ 881,950	\$ 1,285,478	\$ 5,723,843
Total Revenue/Other Resources	\$ 44,839,836	\$ 41,525,779	\$ 39,285,931	\$ 41,099,707
Total Expenditures/Other Uses	\$ 39,596,172	\$ 42,071,923	\$ 43,025,228	\$ 48,163,374
Net Surplus/(Deficit)	\$ 5,243,665	\$ (546,144)	\$ (3,739,297)	\$ (7,063,667)
Beginning Fund Balance	\$ 10,922,454	\$ 16,166,119	\$ 15,619,975	\$ 11,880,677
Ending Fund Balance	\$ 16,166,119	\$ 15,619,975	\$ 11,880,677	\$ 4,817,010
Day of Operating Expenses in Fund Balance	158	143	106	38
Rev/Exp +/- to get to 90 Days of Op Ex in Fund Balance	\$ -	\$ -	\$ -	\$ 6,509,664
Rev Inc/Exp dec to get to 120 Days of Op Ex in Fund Balance	\$ -	\$ -	\$ 1,539,856	\$ 10,285,222

ENROLLMENT

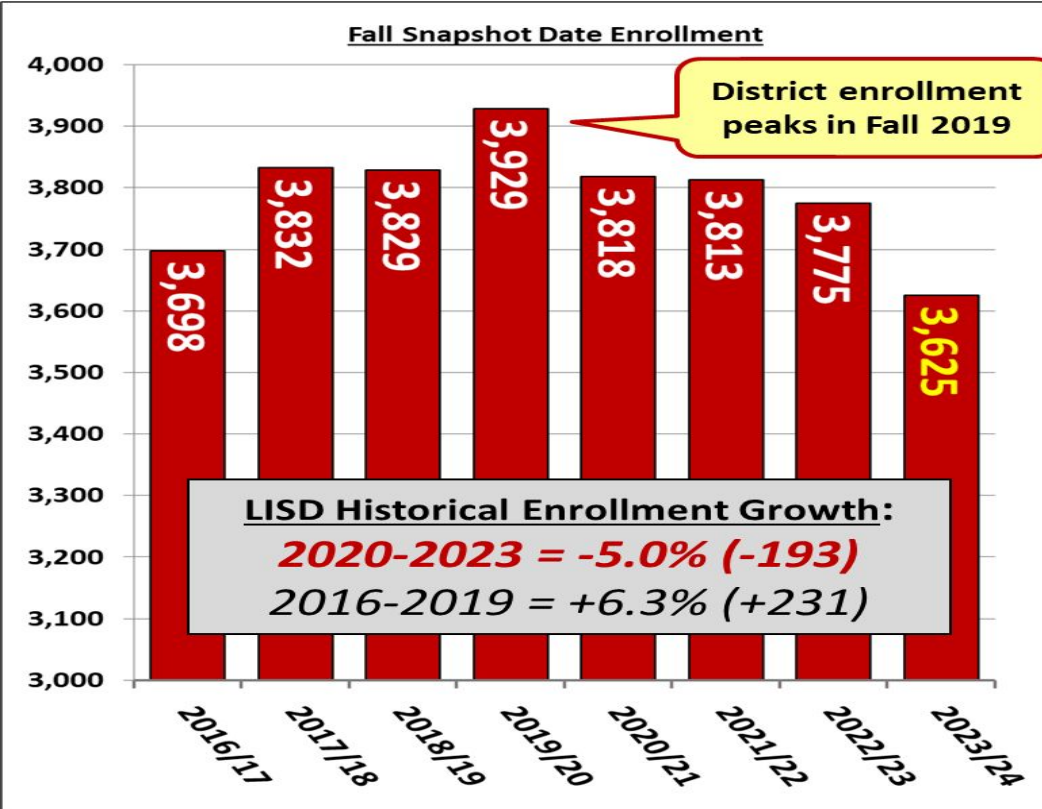




LOVEJOY ISD ENROLLMENT HISTORY (RESIDENT STUDENTS ONLY)

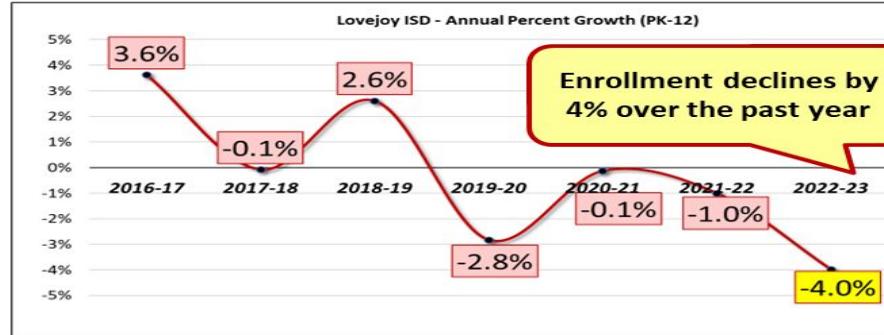


Fall Snapshot Date Enrollment

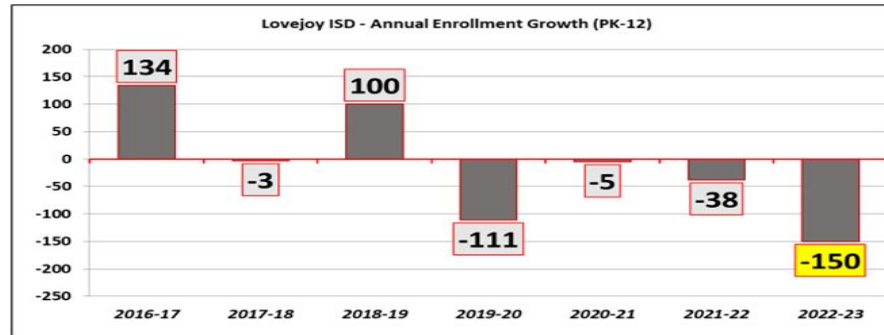


*Student totals represent true resident students only; Lovejoy Scholars and students of LISD Staff are excluded

Lovejoy ISD - Annual Percent Growth (PK-12)



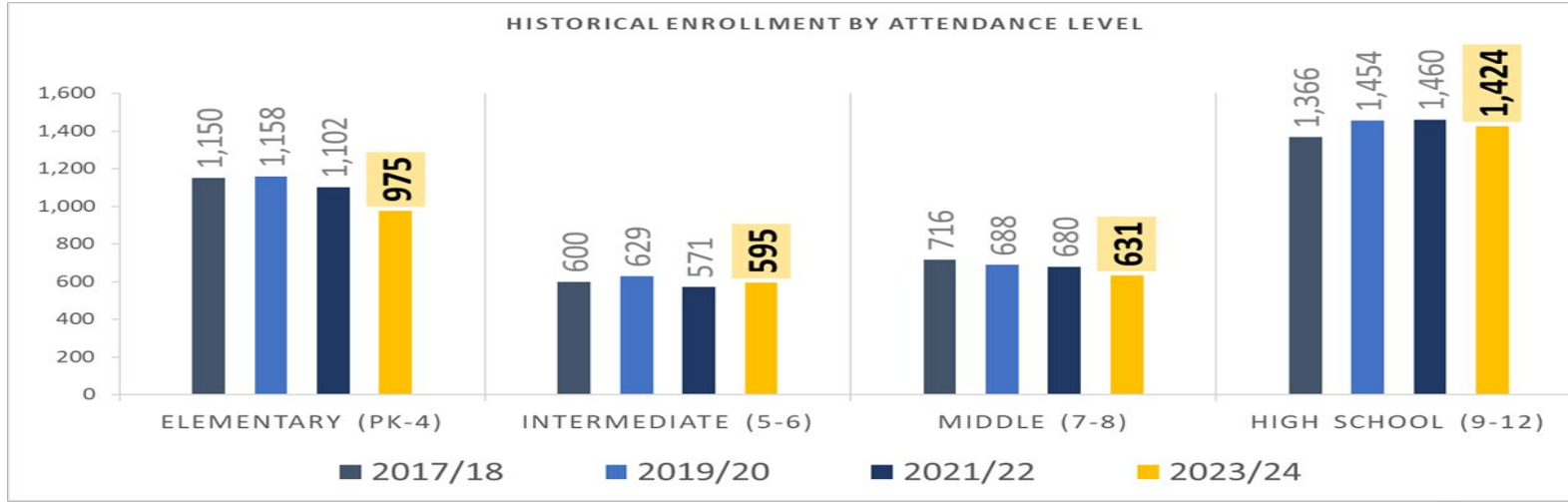
Lovejoy ISD - Annual Enrollment Growth (PK-12)



Since 2019 peak, resident enrollment is down 7.7% (-304 students)



LOVEJOY ISD ENROLLMENT HISTORY RESIDENT STUDENTS ONLY



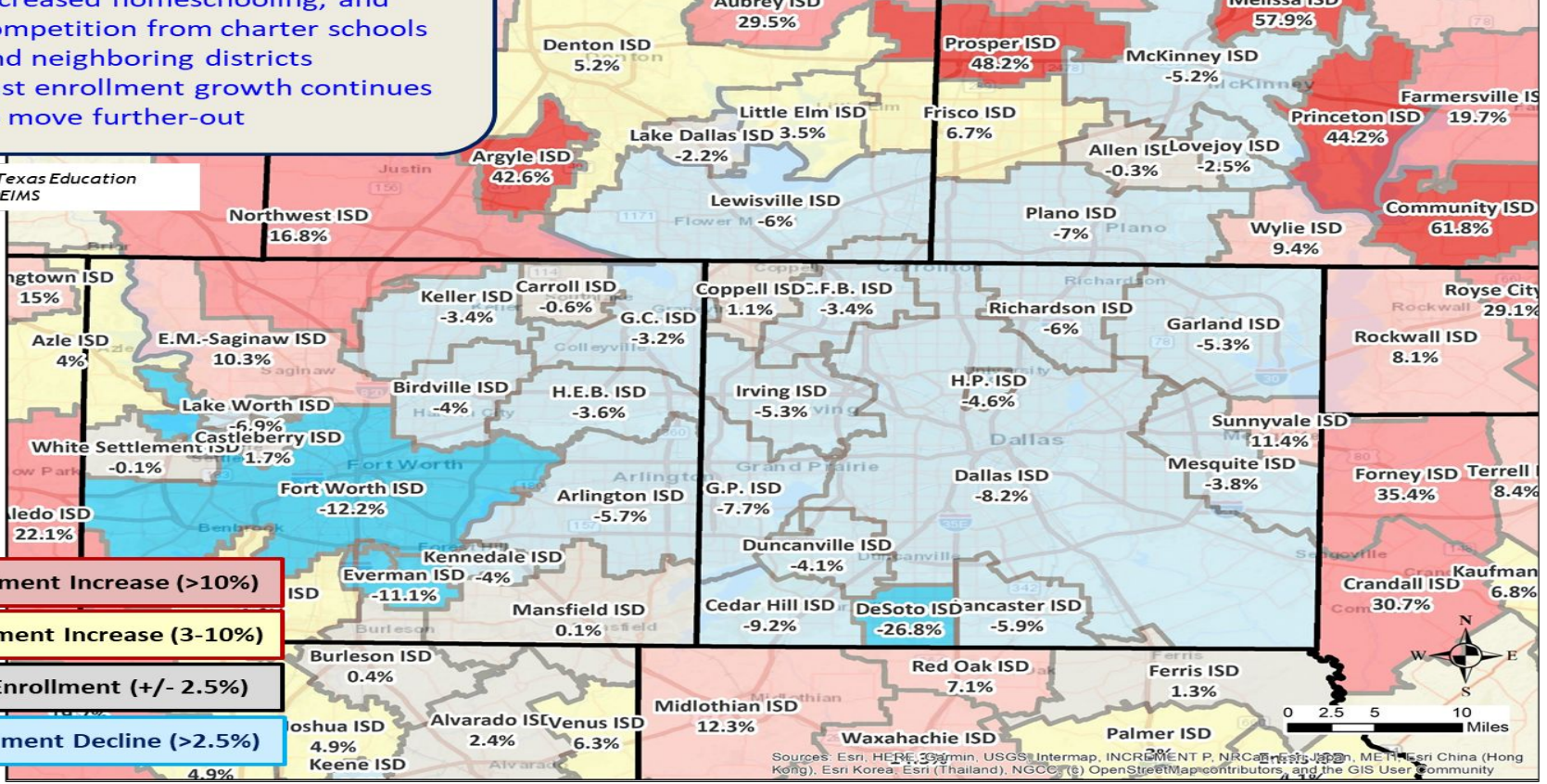
Year (Fall)	Elementary EE/PK			Elementary K-4			Intermediate 5-6			MS 7-8			High 9-12			District		
	Total Enrollment	Annual Growth	Percent Change	Total Enrollment	Annual Growth	Percent Change	Total Enrollment	Annual Growth	Percent Change	Total Enrollment	Annual Growth	Percent Change	Total Enrollment	Annual Growth	Percent Change	Total Enrollment EE-12	Annual Growth	Percent Change
2016	20			1,110			580			664			1,324			3,698		
2017	15	-5	-25.0%	1,135	25	2.3%	600	20	3.4%	716	52	7.8%	1,366	42	3.2%	3,832	134	3.6%
2018	19	4	26.7%	1,136	1	0.1%	629	29	4.8%	663	-53	-7.4%	1,382	16	1.2%	3,829	-3	-0.1%
2019	22	3	15.8%	1,136	0	0.0%	629	0	0.0%	688	25	3.8%	1,454	72	5.2%	3,929	100	2.6%
2020	17	-5	-22.7%	1,070	-66	-5.8%	603	-26	-4.1%	710	22	3.2%	1,418	-36	-2.5%	3,818	-111	-2.8%
2021	11	-6	-35.3%	1,091	21	2.0%	571	-32	-5.3%	680	-30	-4.2%	1,460	42	3.0%	3,813	-5	-0.1%
2022	13	2	18.2%	1,051	-40	-3.7%	589	18	3.2%	664	-16	-2.4%	1,458	-2	-0.1%	3,775	-38	-1.0%
2033	14	1	7.7%	961	-90	-8.6%	595	6	1.0%	631	-33	-5.0%	1,424	-34	-2.3%	3,625	-150	-4.0%

*Student totals represent true resident students only

and competition from charter schools and neighboring districts
 ➤ Fast enrollment growth continues to move further-out

Source: Texas Education Agency PEIMS

- Enrollment Increase (>10%)
- Enrollment Increase (3-10%)
- Flat Enrollment (+/- 2.5%)
- Enrollment Decline (>2.5%)



Sources: Esri, HERE, DeLorme, USGS, Intermap, INCREMENT P, NRCan, Esri Japan, METI, Esri China (Hong Kong), Esri Korea, Esri (Thailand), NGCC, (c) OpenStreetMap contributors, and the GIS User Community

LOVEJOY ISD: 2023/24 UPDATE

- 2020 Census age cohort data released in 3Q23
- From 2010-2020 the district's population under age 18 increased by 17% (+630)
- 2023 Estimates indicate that the younger population in the district has declined over the past 3 years, retreating to near 2010 levels
- 2020 Census results also showed that LISD residents are getting older with the Age 65 & Older population increasing nearly 50% from 2010-2020
- 2023 estimates for the district continue to show an aging population

Age Cohorts	2010 Census	2020 Census	2023 Estimate
Total Under Age 18	3,652	4,282	3,610
Share of Overall Lovejoy ISD Population	28.7%	27.2%	22.1%

Total Residents	2010 Census	2020 Census	2023 Estimate
Age 65 & Older	2,150	3,196	3,675
Share of Overall Lovejoy ISD Population	17.3%	20.3%	22.5%

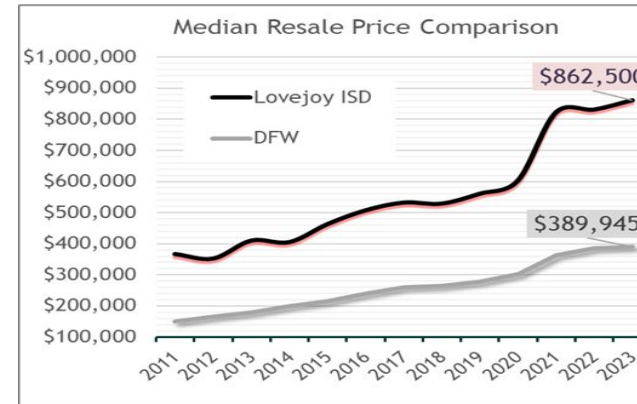
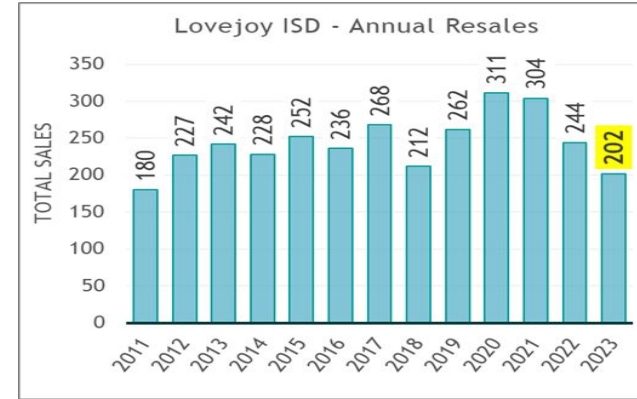
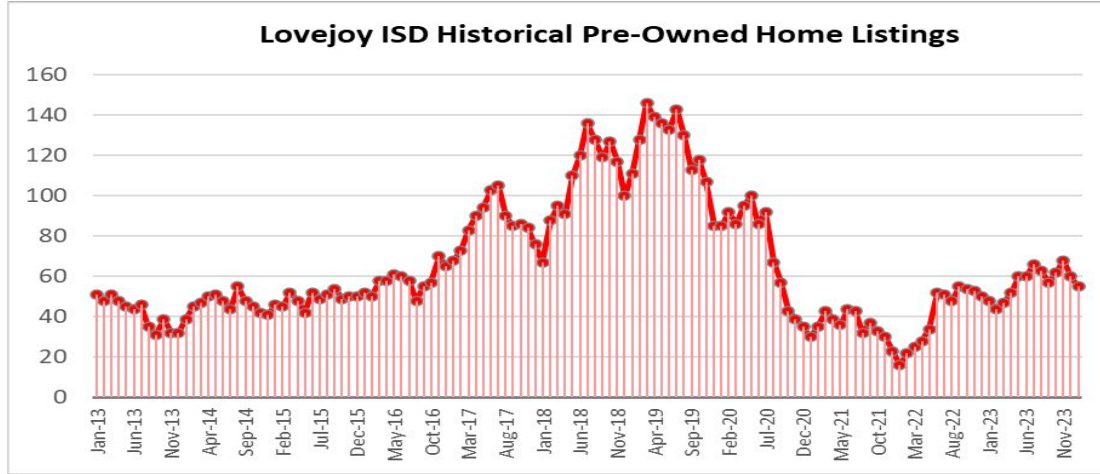


Source: US Census Bureau and Esri





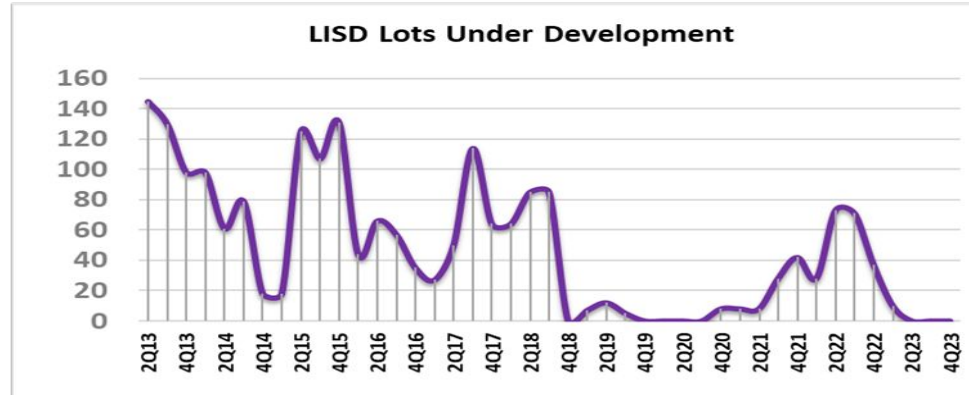
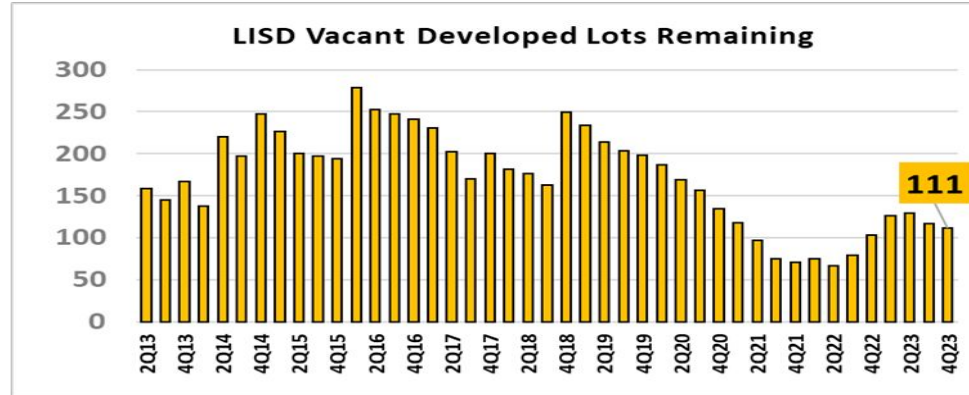
LOVEJOY ISD PRE-OWNED HOME MARKET





LOVEJOY ISD NEW HOME LOT INVENTORY

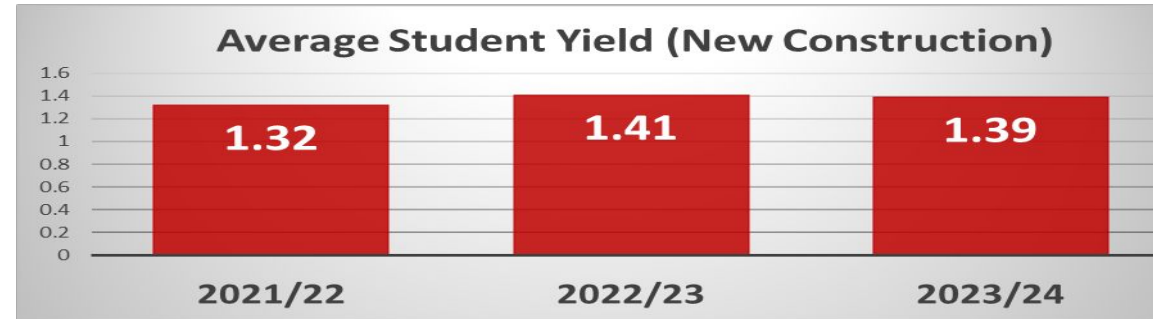
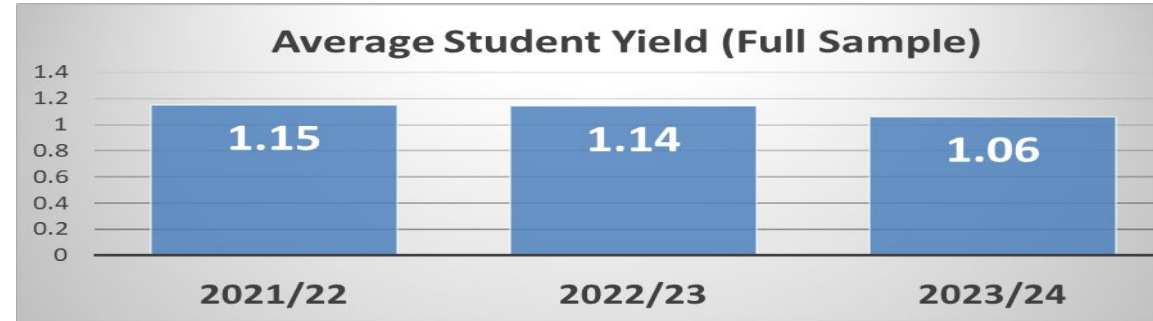
- 42 homes in-process at YE 2023 (under construction, finished vacant, or models)
- 111 vacant developed lots remaining as of Dec. 2023
- No new lots are currently under development
- Only 24 future lots are currently platted



LOVEJOY ISD STUDENTS YIELDS



- In 2023/24, single-family homes in the district are yielding an average of **1.06** students per home, down from 1.14 last year
- The decline is another reflection of fewer elementary students in the more mature subdivisions of the district
- However, new construction continues produce strong yields as large families continue to seek out Lovejoy ISD schools
- The student yield from currently active new construction subdivisions remains very high, at an average at 1.39 enrolled students per home
- Lovejoy ISD's yield from new homes remains well above what other DFW districts are seeing

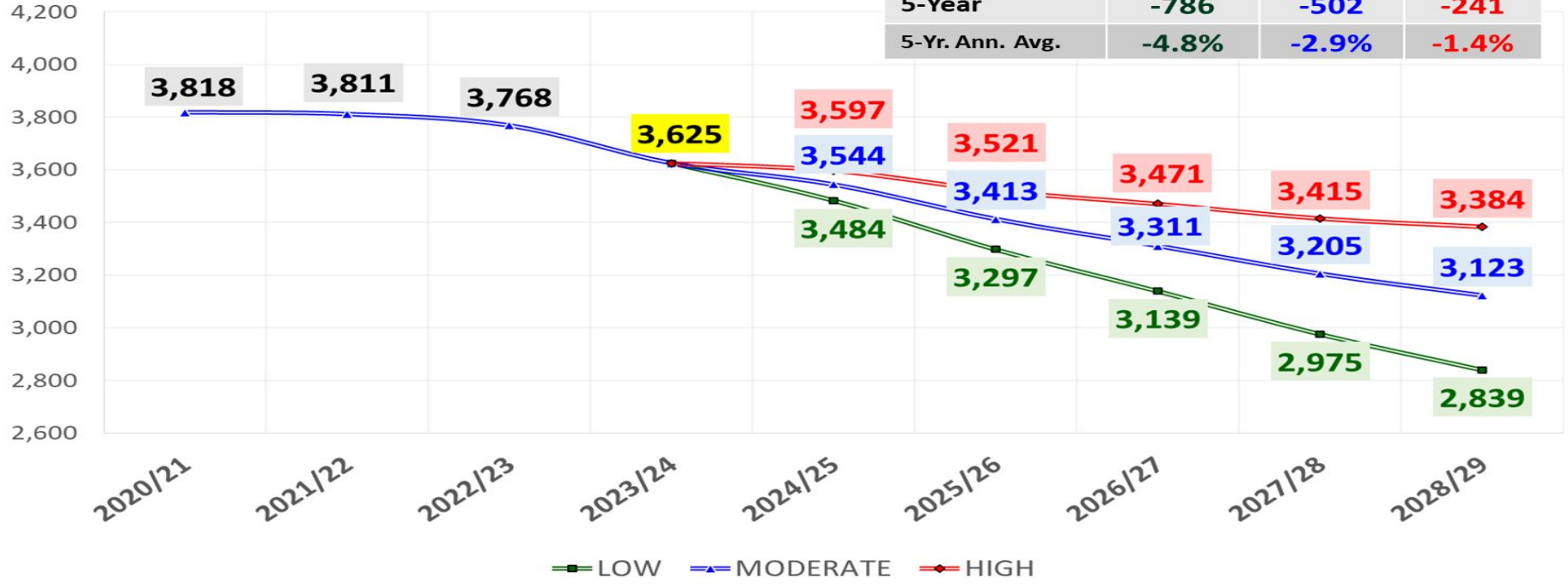


- Typical SF Yield in other DFW districts:
Wylie = 0.80, Allen = 0.61, Garland = 0.50,
Celina = 0.66, Grapevine-Colleyville = 0.43,
Midlothian = 0.67



DISTRICT ENROLLMENT PROJECTIONS: RESIDENT STUDENTS ONLY

Projected Net Growth	Low Scenario	Moderate Scenario	High Scenario
3-Year	-486	-314	-154
5-Year	-786	-502	-241
5-Yr. Ann. Avg.	-4.8%	-2.9%	-1.4%



PATHWAY TO BUDGET DEVELOPMENT



- Class Size and Scaling for Enrollment (Staff Attrition)
- Program Model Adjustment
- Master Schedule Change
- Reduction in Force - Central Administration
- Lovejoy Scholars
- Extracurricular Fees

CLASS SIZE AND SCALING FOR ENROLLMENT (STAFF ATTRITION)



- Decrease in elementary and intermediate school enrollment resulting in grade level teacher position reductions
- Increase class sizes at all grade levels

Elementary	21-24 students
Intermediate	24-27 students
Secondary	26-28 students

- Approximate Savings: \$472,000

Program Model Adjustment

- **Gifted and Talented**

- Shift stand alone GT classes at WSMS to clustering students to maximize schedule efficiencies. Students will continue to receive services from certified GT teachers. Current average GT class size at WSMS is approximately 20 students.
- Modified pull out programming for grades K-3.

- **Special Education**

- Staffing responsibilities adjustments
- Will continue to meet Maintenance of Efforts requirements

Approximate Savings: \$300,000



Master Schedule Changes

- **Master Schedule Changes**
 - 7 Period Day (LHS, WSMS)
 - 5th Grade Reflects Elementary Schedule (SCIS)
 - 6th Grade Modified Middle School (SCIS)
- **7 Period Master Schedule Impact**
 - Savings of FTEs
 - Believe the campus staff reductions in FTEs can be achieved through staff attrition
 - Adjustment in student elective/opportunities (option of 3 electives verses 4 electives)
Students will continue to have the option to participate in both athletics and fine arts.
 - Class periods extended by 5 minutes (45 to 50 minutes and LHS and WSMS)
 - Increase of class period minutes meets CTE minimum minutes requirement
 - Decrease of 1 Teacher Daily Planning from 2 Daily Planning Periods (LHS, WSMS)
- **Increase class sizes K-12**
- **Approximate Savings: \$844,000**



Master Schedule Changes

Response to Minimize Student and Staff Impact of 6 of 7 Period Day from 6 of 8 Period Day

- Consideration of options for teachers to gain additional planning time through creative scheduling of Leopard Time (LHS, WSMS)
- Considerations under review to continue to offer opportunities for LHS students to explore areas of interest, acquire additional credits/courses, and participation in extracurricular activities that an 8 period schedule offers compared to a 7 period schedule:
 - Offer summer courses
 - Offer online courses
 - Exploration of increasing practicum opportunities for students
 - Enhancing senior project for students to explore high interest areas, post secondary pathways and career pathways (integration into current courses beginning the 9th grade year)



REDUCTION IN FORCE - CENTRAL ADMINISTRATION

- Review current programming at the central administration level to identify positions that can become more efficient with fewer staff members and then reallocating funds to maximizing student opportunities.



Summary of Cost Savings

- Class Size and Scaling = \$680,000
- Program Model Adjustment = \$300,000
- Master Schedules = \$844,000
- Reduction in Force = approximately \$ 200,000
- **Approximate Total = \$1,764,000**





Financial Model Review

Financial Model - Update for Change



Projection as of 2/26/2024

	FINAL ACTUAL		PROJECTED		PROJECTED BUDGETS	
	FY23	FY24	FY25	FY26	FY25	FY26
Student Enrollment	4,210	4,025	3,781	3,502		
Increase/(Decrease)	(174)	(185)	(245)	(279)		
Average Daily Attendance (ADA) (Actual, '21-'22 TPAR was 4,17	4,020	3,850	3,616	3,349		
Attendance Rate	95.5%	95.6%	95.6%	95.6%		
State Certified Property Value ("T2" value) @ \$40K Exemption	\$ 3,569,852,514	\$ 3,588,978,916	\$ 4,385,837,159	\$ 5,017,600,239		
% Increase Property Value	15.2%	0.5%	22.2%	14.4%		
Maintenance & Operations (M&O) Tax Rate	\$ 0.9429	\$ 0.7575	\$ 0.7552	\$ 0.7530		
Interest & Sinking (I&S) Tax Rate	\$ 0.5000	\$ 0.5000	\$ 0.5000	\$ 0.5000		
Total Tax Rate	\$ 1.4429	\$ 1.2575	\$ 1.2552	\$ 1.2530		
Excess Revenue (Recapture)	\$ 1,349,437	\$ 743,326	\$ 2,135,360	\$ 7,863,366		
Total Revenue/Other Resources	\$ 44,839,836	\$ 41,525,779	\$ 40,530,332	\$ 44,422,996		
Total Expenditures/Other Uses	\$ 39,596,172	\$ 42,071,923	\$ 42,724,514	\$ 48,887,401		
Net Surplus/(Deficit)	\$ 5,243,665	\$ (546,144)	\$ (2,194,181)	\$ (4,464,405)		
Beginning Fund Balance	\$ 10,922,454	\$ 16,166,119	\$ 15,619,975	\$ 13,425,793		
Ending Fund Balance	\$ 16,166,119	\$ 15,619,975	\$ 13,425,793	\$ 8,961,388		
Day of Operating Expenses in Fund Balance	158	143	121	70		
Rev/Exp +/- to get to 90 Days of Op Ex in Fund Balance	\$ -	\$ -	\$ -	\$ 2,541,094		
Rev Inc/Exp dec to get to 120 Days of Op Ex in Fund Balance	\$ -	\$ -	\$ -	\$ 6,375,254		

Enrollment: Lovejoy Scholars



	ENROLLMENT FINANCIAL TOTAL			FINANCIAL IMPACT	
	2023-2024	2024-2025	2025-2026	2024-2025	2025-2026
Residents Only	3,587	3,412	3,182		
Staff	216	196	182		
Returning Scholars	222	173	138		
SUBTOTAL	4,025	3,781	3,502		
Current Surplus/<Deficit> Day of Operating Expenses in Fund Balance	\$ (546,144) 143	\$ (2,198,501) 121	\$ (4,464,405) 70		
New Scholars up to 220		3,828	3,537	47	35
Current Surplus/<Deficit> Day of Operating Expenses in Fund Balance	\$ (546,144) 143	\$ (1,875,742) 125	\$ (3,896,338) 78	\$ 322,759 4	\$ 568,067 8
New Scholars up to 300		3,908	3,664	127	162
Current Surplus/<Deficit> Day of Operating Expenses in Fund Balance	\$ (546,144) 143	\$ (1,328,555) 131	\$ (2,786,017) 93	\$ 869,947 10	\$ 1,678,388 23

Extra-Curricular Activities Fee



	SURPLUS/<DEFICIT>			EXTRA CURRICULAR FEE IMPACT	
	2023-2024	2024-2025	2025-2026	2024-2025	2025-2026
Current Surplus/<Deficit> Day of Operating Expenses in Fund Balance	\$ (546,144) 143	\$ (2,198,501) 121	\$ (4,464,405) 70		
Current Surplus/<Deficit> Day of Operating Expenses in Fund Balance	\$ (546,144) 143	\$ (1,593,124) 126	\$ (3,884,507) 79	\$ 605,378 5	\$ 579,898 9

*Districts may only charge fees for extracurricular activities for fine arts and athletics. The above chart reflects the financial benefit of charging a \$350 fee for extracurricular activities.

Big Picture Timeline



❑ February 2024

- ❑ Budget Workshop #3
- ❑ Expense/Cost Assumptions
 - ❑ Program Assessment and Cost
 - ❑ Operational Efficiencies
- ❑ Finalize Enrollment Projections

❑ March 2024

- ❑ Budget Workshop #4
- ❑ Finalize Revenue Assumptions
 - ❑ Fee assumptions
 - ❑ Lovejoy Scholars
 - ❑ Other Considerations
- ❑ First Round of Contracts

❑ April 2024

- ❑ Budget Workshop #5
- ❑ Compensation Consideration
- ❑ Second Round of Contracts

❑ May 2024

- ❑ Final Cabinet Review of Departmental Budgets
- ❑ Budget Workshop #6

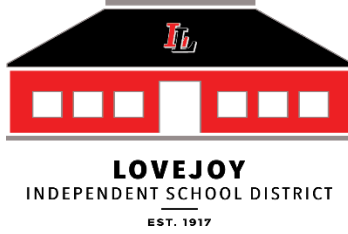
❑ June 2024

- ❑ 2024-2025 Budget Adoption
- ❑ Adoption of Tax Rate
- ❑ Adoption of Compensation Plan



THANK YOU

17. Consider and Take Possible Action to Declare the Need for a Reduction in Force Program Change in Accordance with Board Policy DFFB (LOCAL)
Presenter: Katie Kordel, Superintendent and Anna Koenig, Executive Director of Human Resources and Communications



Lovejoy Independent School District Board of Trustees

Date of Meeting	February 26, 2024
Document Title	Reduction in Force: Program Change-Central Administration Level (Board Policy DFFB LOCAL)
Presented For	X Board Action Report/Review Only
Supporting Documents	None Attached X Provided Later
Administrator Responsible	Anna Koenig, Executive Director of Human Resources and Communications



Executive Summary

The administration is recommending a Reduction in Force: Program Change (Board Policy DFFB (LOCAL)). The programmatic changes would be directly related to **central administration** positions that can become more efficient with fewer staff members. The program changes would not be related to individual employees. When determining impacted areas the board would follow Board Policy DFFB (LOCAL) These changes would allow the district to reallocate funds while maximizing student opportunities. We anticipate less than 5 positions would be impacted by the RIF: Program Change.

Fiscal Implications

Depending on the identified program changes and the positions at the central administration level, there could be a possible savings of \$200,000 or more.

Administrator Recommendation

At this time, the Superintendent and myself as the Superintendent's designee recommend declaring a reduction in force due to the necessary programmatic changes identified across the District.

District Priority

Priority 1: Lovejoy ISD students will live our Legacy of Excellence by learning at high levels and graduating life ready.

Priority 2: Lovejoy ISD will value employees as our greatest asset in serving students.

Priority 3: Lovejoy ISD will prioritize community, connection, and communication.

Priority 4: Lovejoy ISD will strategically plan for the safety and security of students and staff, financial sustainability, and effective operations.

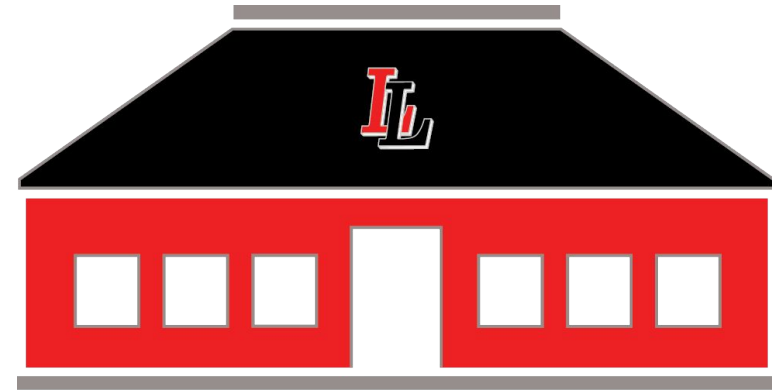
Reduction in Force: Program Change

ANNA KOENIG

Executive Director of Human Resources and
Communications

February 26, 2024

Board Meeting



LOVEJOY
INDEPENDENT SCHOOL DISTRICT

EST. 1917

LOVEJOY 2030

Strategic Plan

	Financial Sustainability	
Strategic Target 7.2	Lovejoy ISD will develop and implement intentional staffing efficiencies.	
	Strategy	Key Indicators
Strategy 7.2.1	Utilize staffing guidelines in staffing determinations and development of master schedules.	Development of staffing guidelines Review master schedules to determine alignment with staffing guidelines
Strategy 7.2.2	Review contract days, job descriptions, and compensation before filling vacant positions.	Establish and implement a standard position review process Review staffing and compensation against comparison districts
Strategy 7.2.3	Review master schedules for each campuses and departments and consider all options including, but not limited to firm class registration deadlines, travel times, balance teacher workloads, block scheduling, class size, etc.	Analysis of master schedules to determine implementation of staffing guidelines vs actual results

FACTORS INFLUENCING THE BUDGET



The Economy

Inflation, teacher shortage, and other economic factors like rising insurance premiums have put a strain on the operating budget.



The Texas Legislature

The state has enough money to help with a record surplus of \$37.2 billion, but the \$4 billion appropriated for schools and has yet to be spent.

OTHER FACTORS INFLUENCING THE BUDGET



Enrollment

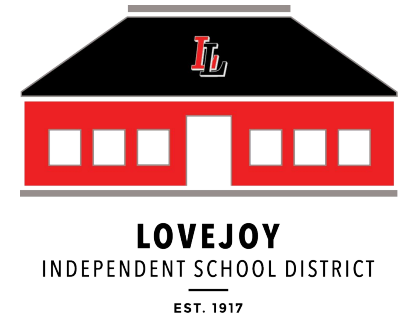
Enrollment continues to decline. Lovejoy ISD local resident enrollment has declined by more than 300 since 2020.



Attendance

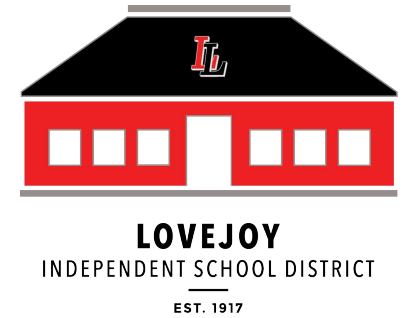
Our attendance rate has decreased since COVID which is in line with the state-wide trend. State-wide the attendance rate is down more than 3%. District-wide attendance is down more than 2%.

BOARD POLICY DFFB (LOCAL)



This policy shall apply when a reduction in force due to a program change requires the nonrenewal of a term contract. A program change may be due to, for example, a redirection of resources; efforts to improve efficiency; a change in enrollment; a lack of student response to particular course offerings; legislative revisions to programs; or a reorganization or consolidation of two or more individual schools, departments, or school districts.

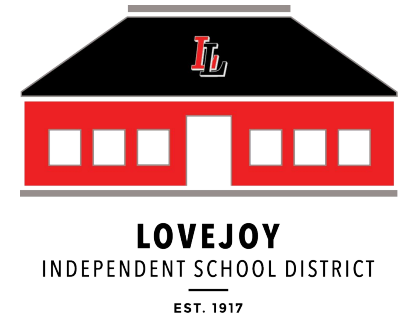
BOARD POLICY DFFB (LOCAL)



Definitions used in this policy are as follows:

- "Program change" shall mean any elimination, curtailment, or reorganization of a program, department, school operation, or curriculum offering, including, for example, a change in curriculum objectives; a modification of the master schedule; the restructuring of an instructional delivery method; or a modification or reorganization of staffing patterns in a department, on a particular campus, or District-wide.
- "Nonrenewal" shall mean the termination of a term contract at the end of the contract period.

BOARD POLICY DFFB (LOCAL)



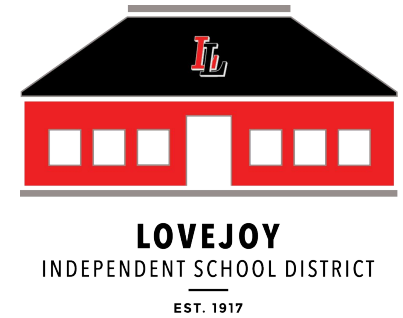
The Superintendent or designee shall apply the following criteria to the employees within an affected employment area when a program change will not result in the nonrenewal of all staff in the employment area. **The criteria are listed in the order of importance and shall be applied sequentially to the extent necessary to identify the employees who least satisfy the criteria and therefore are subject to the reduction in force.** For example, if all necessary reductions can be accomplished by applying the first criterion, it is not necessary to apply the second criterion, and so forth.

1. Qualifications for Current or Projected Assignment: Certification, multiple or composite certifications, bilingual certification, licensure, endorsement, and/or specialized or advanced content-specific training or skills for the current or projected assignment.
2. Performance: Effectiveness, as reflected by:
 - The most recent formal appraisal and, if available, consecutive formal appraisals from more than one year [see DNA]; and
 - Any other written evaluative information, including disciplinary information, from the last 36 months.

If the Superintendent or designee at his or her discretion decides that the documented performance differences between two or more employees are too insubstantial to rely upon, he or she may proceed to apply the remaining criteria in the order listed below.

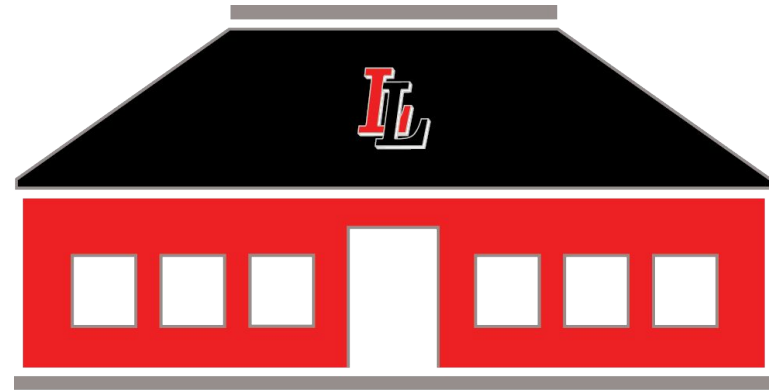
1. Extra Duties: Currently performing an extra-duty assignment, such as department or grade-level chair, band director, athletic coach, or activity sponsor.
2. Professional Background: Professional education and work experience related to the current or projected assignment.
3. Seniority: Length of service in the District, as measured from the employee's most recent date of hire.

BOARD POLICY DFFB (LOCAL)



An employee who has received notice of proposed nonrenewal may apply for available positions for which he or she wishes to be considered. The employee is responsible for reviewing posted vacancies, submitting an application, and otherwise complying with District procedures.

Recommendation:
Reduction in
Force: Program
Change - Central
Administration



LOVEJOY
INDEPENDENT SCHOOL DISTRICT

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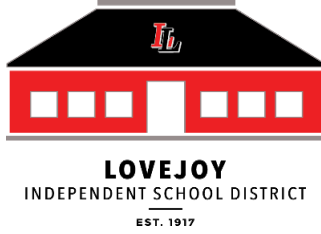
Thank You



LOVEJOY
INDEPENDENT SCHOOL DISTRICT

EST. 1917

18. Presentation: Board Legislative Subcommittee Update
Presenter: Barrett Owens, President



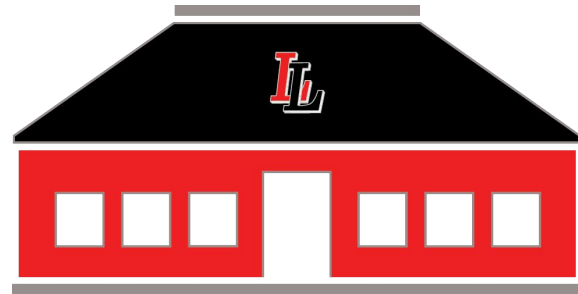
Lovejoy Independent School District Board of Trustees

Date of Meeting	February 26, 2024
Document Title	Board Legislative Subcommittee Update
Presented For	Board Action X Report/Review Only
Supporting Documents	None Attached X Provided Later
Administrator Responsible	Barrett Owens, Board President
Executive Summary	
The Board Legislative Subcommittee will provide a legislative update.	
Fiscal Implications	
N/A	
Administrator Recommendation	
Information only. No administrator recommendation.	
District Priority	
<p>Priority 1: Lovejoy ISD students will live our Legacy of Excellence by learning at high levels and graduating life ready.</p> <p>Priority 2: Lovejoy ISD will value employees as our greatest asset in serving students.</p> <p>Priority 3: Lovejoy ISD will prioritize community, connection, and communication.</p> <p>Priority 4: Lovejoy ISD will strategically plan for the safety and security of students and staff, financial sustainability, and effective operations.</p>	

Board Legislative Subcommittee Update

February 26, 2024

February Regular Board Meeting



LOVEJOY
INDEPENDENT SCHOOL DISTRICT

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Legislative Discussion Topic: Registering to Vote

- **Next Election: Primary on Tuesday, March 5th**
 - Register to vote in person or by mail by Monday, February 5th.
 - If needed, the Primary Runoff will be on Tuesday, May 28th. Register to vote by Monday, April 29th.
- **Next General Election: Saturday, May 4th**
 - Register to vote by Thursday, April 4th.
- Resources available on Vote411.org

Texas State Board of Education (SBOE), District 12

About This Race

Member, State Board of Education: Four-year term. The fifteen-member board decides curriculum, standards, student testing, special education programs, and textbooks for Texas public schools. It also oversees the Permanent School Fund. Current annual salary: Members of the Board do not receive pay, but are reimbursed for expenses to attend meetings.

More information can be found here: [SBOE — State Board of Education | Texas Education Agency](#)

Republican and Democratic Primary Data Report

According to Ryan Data & Research, turnout for the 2024 Republican Primary in Texas currently stands at 1.2%. At this point in 2022, turnout was at 0.9%. 90.2% of votes so far have been cast in person (vs. by mail). Voters ages 70 and up currently comprise 46.8% of the vote, voters ages 50-69 comprise 39.6%, and voters ages 30 to 49 comprise 11.3%.

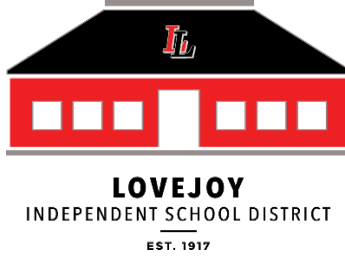
For the Texas Democratic Primary, Ryan Data & Research found a turnout rate of 0.6% at this point in early voting. At this point in 2022, turnout was also at 0.6%. 78.4% votes so far have been cast in person (vs. by mail). Voters ages 70 and up currently comprise 47.8% of the vote, voters ages 50-69 comprise 35.9%, and voters ages 30 to 49 comprise 12.2%.



THANK YOU

19. Consideration and Possible Action to Approve the Updated Resolution Governing School Marshals

Presenter: Kyle Pursifull, Executive Director of District Support Services



Lovejoy Independent School District Board of Trustees

Date of Meeting	February 26, 2024
Document Title	Updated School Marshal Resolution
Presented For	X Board Action Report/Review Only
Supporting Documents	None X Attached Provided Later
Administrator Responsible	Kyle Pursifull, Executive Director of District Support Services



Executive Summary

The Administration recommends consideration be given to act on the Updated School Marshal Resolution.

Fiscal Implications

N/A

Administrator Recommendation

Recommend approval of the following Motion:

“I move to approve the adoption of the attached updated resolution regarding school marshals as written.”

District Priority

Priority 1: Lovejoy ISD students will live our Legacy of Excellence by learning at high levels and graduating life ready.

Priority 2: Lovejoy ISD will value employees as our greatest asset in serving students.

Priority 3: Lovejoy ISD will prioritize community, connection, and communication.

Priority 4: Lovejoy ISD will strategically plan for the safety and security of

students and staff, financial sustainability, and effective operations.

RESOLUTION

Authorization Pursuant to CKC (LOCAL) Policy

WHEREAS, the Lovejoy ISD Board of Trustees has adopted policy CKC (LOCAL), related to emergency plans and security measures; and

WHEREAS, policy CKC (LOCAL) requires the Board of Trustees to take specific action to authorize school administrators/employees to possess certain firearms on school property, at school-sponsored or -sanctioned events, and at school board meetings; and

WHEREAS, (name)_____ has demonstrated to the Board of Trustees that he/she has met all training and licensing requirements established by the State of Texas and policy CKC (LOCAL) to carry a concealed/open carry (duty belt) handgun in accordance with state law; now

THEREFORE, BE IT RESOLVED

THAT, by virtue of this Resolution, (name)_____ is specifically authorized to be in possession of a concealed/open carry (duty belt) handgun on school property, at school-sponsored or -sanctioned events, and at school board meetings; and be it further RESOLVED

THAT (name)_____ is authorized to use this weapon in his/her best judgment and discretion for the purpose of protecting students, staff, and others lawfully on school property in emergency situations at school or school events, including invasion of the schools by an armed outsider, hostage situations, students who are armed and posing a direct threat of physical harm to themselves or to others, acts of terrorism and related criminal activity, and similar circumstances; and be it further RESOLVED

THAT this Resolution be filed and maintained with the official records of Lovejoy ISD and a true and correct copy of this Resolution also be maintained in the personnel records of the authorized individual and that (name)_____ maintain a true and correct copy of this Resolution in his/her possession and on his/her person at all times that he/she is in possession of a concealed/open carry handgun on school property, at school-sponsored or -sanctioned events, and at school board meetings.

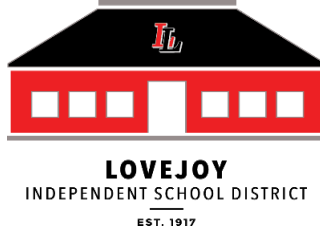
APPROVED BY A VOTE OF __ TO __ ON _____, 2024.

Board President

Board Secretary

20. Consider and Act on the Order to Cancel the May 4th Trustee Election

Presenter: Rodricka Taylor, Coordinator for the Superintendent and Board Services



Lovejoy Independent School District Board of Trustees

Date of Meeting	February 26, 2024
Document Title	Order to Cancel the May 4th Trustee Election
Presented For	X Board Action Report/Review Only
Supporting Documents	None X Attached Provided Later
Administrator Responsible	Rodricka Taylor, Coordinator for the Superintendent and Board Services

Executive Summary

At the January 22, 2024 Board Meeting, the Board of Trustees approved the Order Calling a School Trustee General Election to be held on Saturday, May 4, 2024 for Place 6 and Place 7.

The incumbents (Place 6 and Place 7) of the May 4, 2024 Trustee Election were uncontested as of Tuesday, February 20, 2024. The Administration recommends the Lovejoy ISD (“District”) Board of Trustees cancel the May 4, 2024 Trustee Election as the District would not have contested candidates on the ballot.

Fiscal Implications

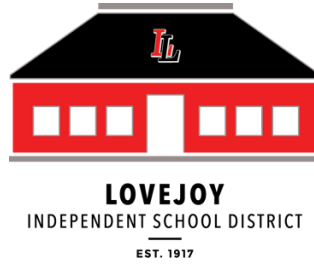
No fiscal implications.

Administrator Recommendation

It is the recommendation of the Administration that the Board of Trustees moves to cancel the May 4, 2024 Trustee Election.

District Priority

Priority 3: Lovejoy ISD will prioritize community, connection, and communication.



**CERTIFICATION OF UNOPPOSED CANDIDATES FOR OTHER
POLITICAL SUBDIVISIONS (NOT COUNTY) CERTIFICACIÓN DE
CANDIDATOS ÚNICOS
PARA OTRAS SUBDIVISIONES POLITICAS (NO EL CONDADO)**

To: Presiding Officer of Governing Body
Al: Presidente de la entidad gobernante

As the authority responsible for having the official ballot prepared, I hereby certify that the following candidates are unopposed for election to office for the election scheduled to be held on May 4, 2024.

Como autoridad a cargo de la preparación de la boleta de votación oficial, por la presente certifico que los siguientes candidatos son candidatos únicos para elección para un cargo en la elección que se llevará a cabo el el 4 de mayo de 2024.

List offices and names of candidates:
Lista de cargos y nombres de los candidatos:

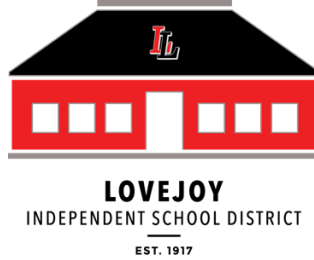
Office(s) Cargo(s)	Candidate(s) Candidato(s)
Jason Jaynes	Position 6
Barrett Owens	Position 7

Signature (Firma)

Printed name (Nombre en letra de molde)

(Seal) (sello) Title (Puesto)

Date of signing *(Fecha de firma)*



ORDER OF CANCELLATION
EJEMPLO DE ORDEN DE CANCELACIÓN

The Lovejoy Independent School District hereby cancels the election scheduled to be held on May 4, 2024 in accordance with Section 2.053(a) of the Texas Election Code. The following candidates have been certified as unopposed and are hereby elected as follows:

El Lovejoy Independent School District por la presente cancela la elección que, de lo contrario, se hubiera celebrado el 4 de mayo de 2024 de conformidad con la Sección 2.053(a) del Código de Elecciones de Texas. Los siguientes candidatos han sido certificados como candidatos únicos y por la presente quedan elegidos como se haya indicado a continuación:

Candidate (Candidato)	Office Sought (Cargo al que presenta candidatura)
Jason Jaynes	Position 6
Barrett Owens	Position 7

A copy of this order will be posted on Election Day at each polling place that would have been used in the election.

El Día de las Elecciones se exhibirá una copia de esta orden en todas las mesas electorales que se hubieran utilizado en la elección.

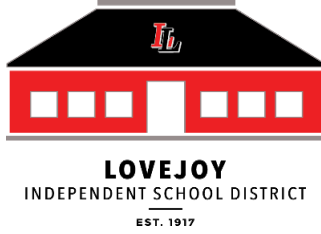
President (*Presidente*)

Secretary (*Secretario*)

(seal) (*sello*)

Date of adoption (*Fecha de adopción*)

21. Consider and Act on the Superintendent's Contract
Presenter: Barrett Owens, President



Lovejoy Independent School District Board of Trustees

Date of Meeting	February 26, 2024
Document Title	Superintendent's Contract
Presented For	X Board Action Report/Review Only
Supporting Documents	None Attached X Provided Later
Administrator Responsible	Barrett Owens, Board President
Executive Summary	
The Board of Trustees will consider extension and amendment of the Superintendent's Contract.	
Fiscal Implications	
N/A	
Administrator Recommendation	
The Board of Trustees (the "Board") of the LOVEJOY INDEPENDENT SCHOOL DISTRICT considers extension and amendment of the Superintendent's Contract entered into between the Board and the Superintendent on the 26th day of February 2024.	
District Priority	
Priority 1: Lovejoy ISD students will live our Legacy of Excellence by learning at high levels and graduating life ready.	
Priority 2: Lovejoy ISD will value employees as our greatest asset in serving students.	
Priority 3: Lovejoy ISD will prioritize community, connection, and communication.	
Priority 4: Lovejoy ISD will strategically plan for the safety and security of students and staff, financial sustainability, and effective operations.	

22. Cabinet Reports

Presenter: Executive Cabinet Members

22.A. Curriculum and Instruction - K-12 Instructional Materials, Science TEKS and Revisions Update

Presenter: Dr. Laurie Tinsley, Assistant Superintendent of Curriculum and Instruction

Curriculum and Instruction Cabinet Report

Dr. Laurie Tinsley

Assistant Superintendent of Curriculum and Instruction

February 26, 2024

Board Meeting



LOVEJOY
INDEPENDENT SCHOOL DISTRICT

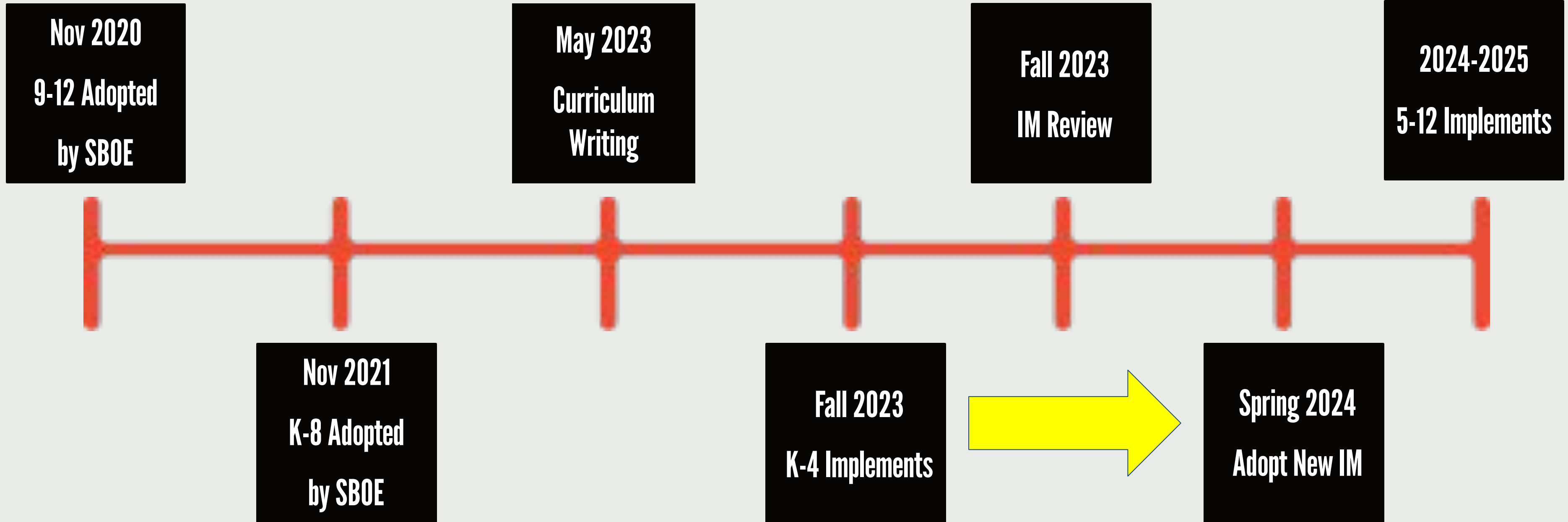
EST. 1917



INSTRUCTIONAL MATERIALS

Curriculum Standards	Curriculum Documents	Instructional Resources
<ul style="list-style-type: none">● Texas Essential Knowledge and Skills (TEKS)● State standards for what students should know and be able to do● The scope of what is taught● Establishes timelines and important milestones (ie., grade levels)● Testing requirements● Mandated by the State Board of Education● Roadmap for Learning	<ul style="list-style-type: none">● Outlines when and the depth in which standards are taught throughout the year● Customized to district needs● Includes pacing guide, scope and sequence, clarifications, priority TEKS, assessment and learning plans● Designed and revised based on data and standards● Incorporates programs and instructional resources	<ul style="list-style-type: none">● Suggested resources such as textbooks, digital resources, etc., that are aligned to the TEKS for the content area● Provides tools, materials and resources to implement the curriculum● Can be changed and adjusted with minimal to no change to curriculum and practices● Must be changed if significant changes to curriculum standards





TIMELINE K-12 Science TEKS and Revisions





TIMELINE

September

Adoption committee formed and initial meeting held to review needs assessment survey provided to all K-12 science teachers. Finalize a rubric to use evaluate instructional materials.

October - November

Adoption committee members attend vendor presentations and begin to review instructional materials. Members narrow the number of viable instructional material resources based on rubric results.

December - February

Publishers provide samples to committee members for review and use in the classroom. Members evaluate materials again using a second rubric. Materials made available for all K-12 Science teachers to review.





TIMELINE

February - March

Window open for community members to view and comment on instructional materials.

Committee members make recommendations based on rubrics results and feedback from teachers and community members.

March Board Meeting

C & I Instructional Material Director will put forth items for board approval of selected titles and purchase.

April

Approved instructional material resources are submitted for purchase through the state purchasing system, with expectations of delivery during May.

Resources processed through the inventory system and distribution to campuses.





LOVEJOY
INDEPENDENT SCHOOL DISTRICT
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QUESTIONS?



22.B. Finance - Tax Collections Update

Presenter: Thomas Willman, Chief Financial Officer

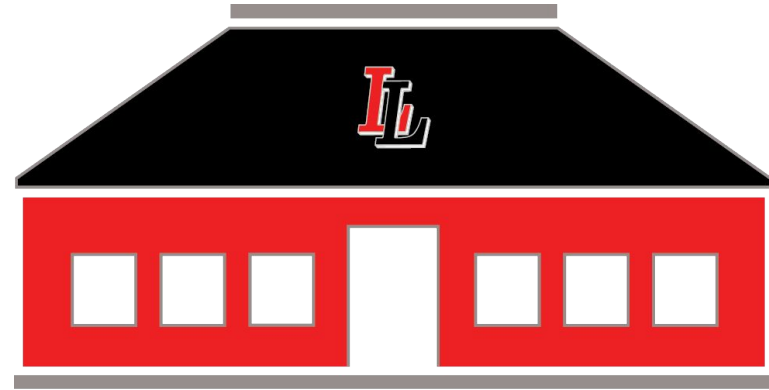
Finance Cabinet Report

THOMAS WILLMAN

Chief Financial Officer

February 26, 2024

Board Meeting



LOVEJOY
INDEPENDENT SCHOOL DISTRICT

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Finance Updates

- ❑ ~\$8.2 million in base tax collections in December for the General Fund and earned ~\$105K in interest revenue for the month.
- ❑ ~\$5.4 million in base tax collections in December for the Debt Service Fund and earned ~\$60K in interest revenue for the month.
- ❑ At the end of January we have 236 days cash on hand in the General Fund.
- ❑ The Comptroller's Property Tax Assistance Division (PTAD) released their preliminary school district property value study (SDPVS) Wednesday, January 31, 2024. We are happy to report that **THE PTAD FOUND LOVEJOY ISD'S LOCAL VALUE TO BE VALID AS A RESULT OF THE SDPVS, AND LOCAL VALUE WAS CERTIFIED.**

2023 TAX COLLECTIONS as of 01/31/2024

	Current Year	% Collections	Prior Year	% Collections
Base M&O + I&S	\$ 37,332,407	75.77%	\$ 40,897,079	79.79%
Original 2023 Tax levy	\$ 49,273,163			
Supplements/Adjustments	\$ <4,277,934>			
Revised Tax Levy	\$ 44,995,229			
Remaining Levy	\$ 7,662,822			
January 2024 Collections	\$ 13,605,919			



THANK YOU

22.C. Human Resources and Communications - Enrollment Update and Attendance Update

Presenter: Anna Koenig, Executive Director of Human Resources and Communications

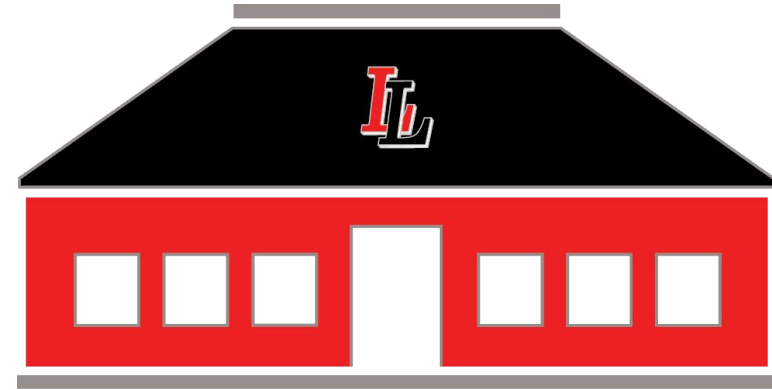
Human Resources and Communications Cabinet Report

ANNA KOENIG

Executive Director of Human Resources and
Communications

February 26, 2024

Board Meeting



LOVEJOY
INDEPENDENT SCHOOL DISTRICT

EST. 1917

Enrollment & Attendance Update

2023-2024 School Year	Enrollment	Yearly Average Daily Attendance (ADA)
August 10, 2023 (Second Day of School)	3979	99.30%
September 5, 2023 (Day after Labor Day)	4027.5	96.33%
October 6, 2023 (Day before Fall Break)	4030	96.93%
November 15, 2023 (Day before Thanksgiving Break)	4039.5	96.80%
January 4, 2024 (First Day of Second Semester)	4046.5	96.65%
February 21, 2024	4023	95.90%

Financial Impact as of February 21, 2024 = \$801,315.00



THANK YOU

22.D. District Support Services - Custodial, Maintenance/Grounds, Safety/Security, and Transportation Update

Presenter: Kyle Pursifull, Executive Director of District Support Services

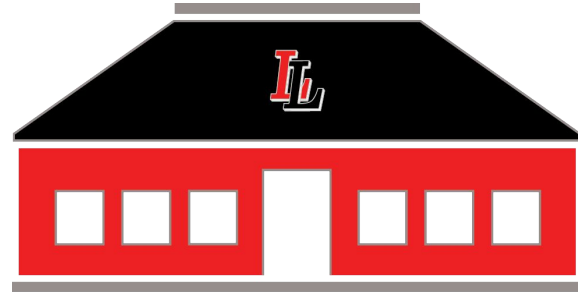
District Support Services Cabinet Report

Kyle Pursifull

Executive Director of District Support Services

February 26, 2024

Board Meeting



LOVEJOY
INDEPENDENT SCHOOL DISTRICT

EST. 1917

District Support Services Team Update

- **Transportation**
 - Spring Sports and Student Activities
- **Safety and Security**
 - Arrival & Dismissal Practices
- **Maintenance & Grounds**
 - HVAC and Grounds Prep for Spring
- **Custodial**
 - Spring Events and Banquets



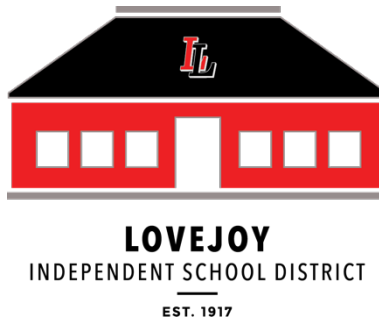
THANK YOU

23. Superintendent's Report

Presenter: Katie Kordel, Superintendent

24. Public Comments Related to Non-Agenda Items

Presenter: Rodricka Taylor, Coordinator for the Superintendent and Board Services



Public Comment Procedures

Regular Meetings

Submitting for Public Comment

Any individual seeking to speak during the public comment session of a regular board meeting must complete and submit the public comment card by no later than 15 minutes prior to the designated start time provided on the meeting notice.

Public comment cards must be completed in their entirety with accurate and truthful information and must designate whether the speaker is speaking on a specific agenda item. Failure to designate an agenda item relevant to the speaker's comments will result in the classification of the public comment as a non-agenda item comment, to be heard at a later time in the meeting.

The Board will provide speakers that submit a public comment card on an agenda item the opportunity to speak prior to the Board's consideration of the item in the order in which they were received.

Public comment cards are only applicable to the meeting in which they are completed and submitted by the established deadline.

Each individual gets one opportunity per meeting to share their comments with the Board of Trustees, not multiple opportunities per individual agenda items.

If a speaker is not present when his/her name is called, the speaker forfeits the opportunity to speak at that meeting.

The comments made by speakers at public comment reflect the opinions solely of the speaker and not the Board of Trustees as a governing body or the District.

Order of Agenda and Limitations

The Board reserves the right to change the order of the agenda items on the notice of meeting and / or defer agenda items until a later date.

Each speaker will be provided up to three minutes to address the Board of Trustees unless more than 10 speakers sign up to speak, in which case, the presiding officer reserves the right to reduce the time allotted to each speaker to no less than one minute per speaker. (Board Policy BED (LOCAL)).

If at any time, in the opinion of the presiding officer, the individual speaker is attempting to address a non-agenda item in the agenda item public comment period, the presiding officer or designee may stop the speaker and defer the speaker's comments to the appropriate portion of the meeting.

Public comments relating to non-agenda items will be deferred until the end of the meeting if time permits, unless otherwise noted by the Board of Trustees.

Disruptive Behavior

Disruptive behavior will not be tolerated in the meeting. If after the provision of a single warning, the disruptive behavior continues, the disruptive individual may be escorted out of the meeting by District officials and/or law enforcement.

It is a criminal offense for a person, with intent to prevent or disrupt a lawful meeting, to substantially obstruct or interfere with the ordinary conduct of a meeting by physical action or verbal utterance.

Conduct defined by Texas Penal Code §42.01 and Board Policies BED (LEGAL) and BED (LOCAL).

Failure to yield the podium at the conclusion of the time allotted to a speaker at public comment constitutes a disruption and will be addressed accordingly.

Comments made to the Board of Trustees by meeting attendees and/or speakers outside of the designated public comment periods during a meeting constitute a disruption.

Board's Response to Public Comment

Specific factual information or recitation of existing policy may be furnished in response to inquiries, but the Board shall not deliberate or decide regarding any subject that is not included on the agenda posted with notice of the meeting. The Board may also refer a speaker to a staff member in authority over the issue.

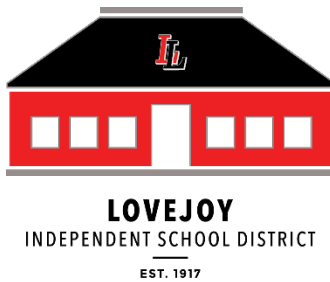
For specific complaints or concerns, speakers are encouraged to utilize the District's appropriate grievance procedures and policies set forth in Board Policies FNG (LOCAL), DGBA (LOCAL), and GF (LOCAL).

Special Meetings

The procedures outlined herein apply to special called Board meetings. However, comments at special called Board meetings are limited to agenda items only.

Statement of Non-Discrimination

The Board does not discriminate against speech on the basis of viewpoint.



School Board Public Comments Sign In February 26, 2024

The Board of Trustees encourages public comment. All public comment at a meeting other than a regularly scheduled meeting should be limited to agenda items posted for the meeting. By signing up to provide public comment at a Board meeting, you are acknowledging and accepting the procedures for public comment available online at lovejoyisd.net.

Any individual seeking to speak during the public comment session of a regular board meeting must complete and submit the public comment card by no later than 15 minutes prior to the designated start time provided on the meeting notice. Public comment cards must be completed in their entirety with accurate and truthful information and must designate whether the speaker is speaking on a specific agenda item. Failure to designate an agenda item relevant to the speaker's comments will result in the classification of the public comment as a non-agenda item comment, to be heard at a later time in the meeting. Public comment cards are only applicable to the meeting in which they are completed and submitted by the established deadline.

Each individual will have one opportunity per meeting to share their comments with the Board of Trustees, not multiple opportunities per individual agenda items. If a speaker is not present when his/her name is called, the speaker forfeits the opportunity to speak at that meeting. All speakers will be limited to no more than three minutes. The presiding officer reserves the right to reduce the number of minutes per speaker to no less than one minute per speaker in order to maintain effective meeting management. The speakers will be recognized in the order in which each person signs up. If there are more speakers than time allotted for public comment, the amount of time per speaker may be reduced, as determined appropriate by the Board of Trustees. If time does not allow for you to speak at public comment, the Board of Trustees may allot additional time for public comment or defer specific agenda items for review at a subsequent meeting in an effort to allow more public comment, as determined necessary by the Board. This public comment card will not be maintained from one meeting to the next and is only applicable to the meeting on the date in which it was submitted.

If you have a specific concern related to an employee of the District or a specific student issue, you are encouraged to utilize the District's grievance procedures provided in Board Policies DGBA (LOCAL), FNG (LOCAL), and GF (LOCAL) or applicable grievance process. Each grievance procedure allows for an individual to redress grievances with the Board of Trustees. All relevant policies are available online at lovejoyisd.net.

Disruptive behavior will not be tolerated in the meeting. If after the provision of a single warning, the disruptive behavior continues, the disruptive individual may be escorted out of the meeting by District officials and/or law enforcement. It is a criminal offense for a person, with intent to prevent or disrupt a lawful meeting, to substantially obstruct or interfere with the ordinary conduct of a meeting by physical action or verbal utterance.

The Board of Trustees appreciates your active participation in the school district.

***I wish to address the Board about a non-agenda item on the February 26, 2024 agenda.**

I wish to speak about agenda item # _____ which is titled:

***I wish to participate in the open forum by speaking about the following topic:**

First and Last Name:

Address:

Phone:

Organization and Campus(es) your student(s) attend (if applicable):

Printed Name & Signature (Acknowledging you have read the procedures above)

Print:

Signature:

Date:

25. Announcements

Presenter: Barrett Owens, President

26. Adjournment

Presenter: Barrett Owens, President