



## Regular Board Meeting Agenda

**Tuesday, July 8, 2025 | 6:00 PM | District Office Board Room, 8176 N. Westover, Joseph City, AZ 86032**

*Items on the regular meeting agenda may be discussed in executive session related to employment matters, for the purpose of obtaining legal advice thereon or other matters pursuant to A.R.S. 38-431.03(A). The Governing Board may change the order of agenda items, pursuant to Governing Board Policy BEDB. The meeting room will be open to the public fifteen minutes prior to the beginning of the meeting.*

### **1. PUBLIC HEARING**

#### **1.A. FY 2025-26 Proposed Budget**

Individuals may comment on the proposed budget. A complete copy of the proposed budget may be viewed at the Joseph City School District Office and online at <https://meetings.boardbook.org/Public/Organization/894> in ACTION ITEMS section of this agenda.

### **2. OPENING ITEMS**

#### **2.A. Call to Order**

#### **2.B. Roll Call**

#### **2.C. Pledge of Allegiance**

#### **2.D. Invocation**

### **3. APPROVE AGENDA**

### **4. APPROVE MINUTES**

**June 10, 2025 Regular Board Meeting**



**Minutes of Regular Board Meeting of the Governing Board  
Joseph City Unified School District  
District Office Board Room, 8176 N. Westover, Joseph City, AZ 86032  
Tuesday, June 10, 2025**

**Members present**

Dayton Flake, Clerk; Karsten Flake, Cat Hansen, Lexi Nelson

**Administrators present**

Bryan Fields, Superintendent; Steven Mills, Business Manager; Eric Miller, JH/HS Principal; Darrel Mosier, Elementary Principal

**Others present**

3 community members

**1. OPENING ITEMS**

**1.A. Call to Order**

Motion to call the meeting to order by Karsten Flake.

Time: 6:00 p.m.

**1.B. Roll Call**

**1.C. Pledge of Allegiance**

**1.D. Invocation**

**2. APPROVE AGENDA**

Motion to approve the agenda by Karsten Flake.

**3. APPROVE MINUTES**

Motion by Dayton Flake to approve May 13, 2025 board meeting minutes; second by Karsten Flake.

Final Resolution: Motion passed.

Yes: Dayton Flake, Karsten Flake, Cat Hansen, Lexi Nelson

**4. SUPERINTENDENT'S REPORT**

**5. REQUESTS TO SPEAK TO THE GOVERNING BOARD**

None

**6. CONSENT AGENDA**

Motion by Karsten Flake to approve the Consent Agenda 6.A – 6.M.; second by Cat Hansen.

Final Resolution: Motion passed.

Yes: Dayton Flake, Karsten Flake, Cat Hansen, Lexi Nelson

**6.A. Approve Expense Vouchers**

Action to ratify district vouchers for the period 5/1/25 through 5/30/25.

**General and Special Funds:** #23 \$173,721.63; #24 \$180,774.74; #25 \$378,505.86; #26 \$90,511.53; #1040 \$63,337.04; #1041 \$62,887.90; #1042 \$38,484.18

**Auxiliary Operations Funds:** #1087 \$254.05; #1091 \$560.57; 1094 \$1,431.21; #1098 \$567.12

**Student Activities Fund:** #1086 \$3,605.15; #1092 \$307.00; #1093 \$1,600.00; #1095 \$71.36; #1099 \$2,165.35

**6.B. Student Activities Fund Report**

Revenues, expenditures and charges in the Student Activities Fund Report; period of 5/1/25 through 5/31/25.

**6.C. Approve Lease Agreement with T-Mobile West LLC**

For placement of cell phone antenna and supporting infrastructure on school property

**6.D. Approve Project Development Agreement with Trane U.S. Inc.**

For consulting services regarding HVAC and lighting upgrades

**6.E. Approval of Governing Board Procedural Rules of Order**

**6.F. Appoint Student Activities Treasurer**

Approve annual appointment of Student Activities Treasurer and Assistant Student Activities Treasurer

**6.G. Authorization to Operate Revolving Funds**

Approval of continuing the operation of the District's revolving accounts for the coming year.

**6.H. Resolution to Approve Voucher Ratification**

Approve continuing resolution to authorize voucher certification between Governing Board meetings.

**6.I. Delegation of Authority to Hire**

Approve the delegation of limited authority to the Superintendent to hire temporary, student, and event workers and other critical staff between Governing Board meetings.

**6.J. Approve Authorized Bank Account, Purchasing and Contract Signers**

Renew and approve authorized signers for bank accounts, purchasing and contracts on behalf of the District.

**6.K. Approve Sole Source Vendors for FY 2025-26**

**6.L. Reimbursements for Vehicle Use**

Approval of vehicle use reimbursements for employees who use personal vehicles for authorized school business.

**6.M. Disposal of Surplus Property**

Approve the disposal of unused surplus furniture, equipment, and other items in compliance with Arizona statutes and administrative code via our online auction web service.

**7. POSSIBLE EXECUTIVE SESSION**

None.

**8. ACTION ITEMS**

**8.A. Personnel Requests**

| Name               | Assignment   | Action      |
|--------------------|--|-------------|
| See attached list  | Coaches  | Renewal     |
| See attached list  | Volunteers   | Acceptance  |
| See attached list  | HS/JH Extra Duty                                   | Assignments |
| Birk, Kate         | Teacher  | Appointment |
| Bowler, Alexandrya | Asst. Pool Manager                                 | Appointment |
| Bowler, Felicia    | Tutor-Noncertified (Summer School)                 | Assignment  |
| Brawley, Micah     | Tutor-Certified (Summer School)                    | Assignment  |
| Bushman, Peter     | Tutor-Certified (Summer School)                    | Assignment  |
| Case, Greg         | Tutor-Certified (Summer School)                    | Assignment  |
| Castellano, Kori   | Tutor-Certified (Summer School)                    | Assignment  |
| Fields, Julie      | Project Coordinator - Grant Management (Part-Time) | Appointment |
| Fischer, Brad      | Tutor-Certified (Summer School)                    | Assignment  |

| Name              | Assignment   | Action      |
|-------------------|--|-------------|
| Fischer, Brad     | Wrestling Tournament Coordinator                   | Renewal     |
| Fischer, Jennifer | Tutor-Certified (Summer School)                    | Assignment  |
| Gayer, Michael    | Tutor-Certified (Summer School)                    | Appointment |
| Hancock, Natalie  | Special Education Director (additional assignment) | Appointment |
| Hardy, Kimberlin  | Seasonal Worker                                    | Renewal     |
| Hardy, Redic      | Bus Driver   | Appointment |
| Hardy, Redic      | Seasonal Worker                                    | Appointment |
| Hansen, Ruth      | Tutor-Certified (Summer School)                    | Assignment  |
| Hayes, Sarah      | Tutor-Noncertified (Summer School)                 | Assignment  |
| Hutchens, Jorja   | Seasonal Worker                                    | Appointment |
| Johnstun, Aaron   | Seasonal Worker                                    | Renewal     |
| Larsen, Eldon     | Volunteer Coach                                    | Renewal     |
| Metzger, Kelly    | Tutor-Certified (Summer School)                    | Assignment  |
| Miller, Amy       | Tutor-Certified (Summer School)                    | Assignment  |
| Miller, Cody      | Coach - JH Wrestling Head                          | Appointment |
| Miller, Jareon    | Seasonal Worker                                    | Appointment |
| Powers, Madyson   | Seasonal Worker                                    | Appointment |
| Powers, Zach      | Seasonal Worker                                    | Appointment |
| Whetten, Anthony  | Tutor-Certified (Summer School)                    | Appointment |

Motion by Karsten Flake to approve the personnel requests as presented; second by Cat Hansen.

Final Resolution: Motion passes.

Yes: Karsten Flake, Dayton Flake, Cat Hansen, Lexi Nelson

**8.B. Approve the Proposed FY 2025-26 Budget**

Overview of the Joseph City Schools budget will be presented. If approved, the proposed budget will be advertised online for public review and a budget hearing will occur on July 8, 2025 at 6:00 p.m. in the District Office Board Room, to allow the public to comment on the budget.

Motion by Karsten Flake to approve the proposed FY 2025-26 Budget; second by Lexi Nelson.

Final Resolution: Motion passes.

Yes: Karsten Flake, Dayton Flake, Cat Hansen, Lexi Nelson

**9. INFORMATION ITEMS**

**9.A. Review of Possible Policy Changes to be Considered for Adoption at a Future Meeting**

See the attached Policy Advisory for policy changes to be considered. See the Link section of this agenda item to view the current policy manual. No policy changes will be adopted at this meeting. Policies affected:

***Policy Advisories 876-905***

DA - Fiscal Management Goals / Priority Objectives

DB; DB-R - Annual Budget

DBC; DBC-R - Budget Planning, Preparation, and Schedules

DBF - Budget Hearings and Reviews / Adoption Process

DBI - Budget Implementation

DBJ - Budget Transfers

DD; DD-E - Funding Proposals, Grants, and Special Projects

DDA - Funding Sources Outside the School System

DEC - Funding from Federal Tax Sources  
DFA - Revenues fro Investments  
DFB - Revenues from School-Owned Real Estate  
DFD - Gate Receipts and Admissions  
DFF - Income from School Sales and Services  
DG - Banking Services  
DGA - Authorized Signatures  
DGD - Credit Cards  
DI - Fiscal Accounting and Reporting  
DIA - Accounting System  
DIB - Types of Funds / Revolving Funds  
DIC - Financial Reports and Statements  
DICA - Budget Format  
DID; DID-R - Inventories  
DIE; DIE-R - Audits / Financial Monitoring  
DJ - Purchasing  
DJE; DJE-R - Bidding / Purchasing Procedures  
DJG; DJG-R - Vendor / Contractor Relations  
DJGA/ DJGA-R - Sales Calls and Demonstrations  
DK; DK-EA; DK-EB - Payment Procedures  
DKA; DKA-E - Payroll Procedures / Schedules  
DN - School Properties Disposition

***Policy Advisories 906-908***

IJNDB; IJNDB-R - Use of Technology Resources in Instruction  
JLF - Reporting Child Abuse / Child Protection  
JR; JR-R - Student Records

**Requests for Future Agenda Items**

Possible addition of additional Wrestling Coach for Girls Wrestling

**9.B. Upcoming Meetings and Events Calendar**

- Next Regular Board Meeting - July 8, 2025; 6:00 p.m.

**10. ADJOURNMENT**

Motion by Karsten Flake to adjourn the meeting; second by Cat Hansen  
Final Resolution: Motion passed.  
Yes: Karsten Flake, Dayton Flake, Cat Hansen, Lexi Nelson  
Meeting adjourned at 6:31 p.m.

APPROVED:

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Board Clerk or President

# Employee Assignments

2025-26

*Recommended for approval 6/10/2025*

| <b>JH/HS Staff Assignments</b> |                                       |
|--------------------------------|---------------------------------------|
| <b>Name</b>                    | <b>Assignment</b>                     |
| Bowler, Laurie                 | Club Sponsor - Chess                  |
| Bowler, Laurie                 | Club Sponsor - National Honor Society |
| Bowler, Laurie                 | School Improvement Chairperson        |
| Brawley, Micah                 | Club Sponsor - Skills USA             |
| Bushman, Jess                  | Class Sponsor                         |
| Edwards, jeri                  | Class Sponsor                         |
| Fischer, Brad                  | Class Sponsor                         |
| Gayer, Michael                 | Class Sponsor                         |
| Gayer, Michael                 | Club Sponsor - Chess                  |
| Hancock, Roland                | Class Sponsor                         |
| Hancock, Roland                | Club Sponsor - FBLA                   |
| Hansen, Marijoe                | Class Sponsor                         |
| Hansen, Marijoe                | Club Sponsor - FFA                    |
| Isaacson, Taura                | Class Sponsor                         |
| Johnstun, Aaron                | Class Sponsor                         |
| Miller, Kyie                   | Class Sponsor                         |
| Neal, Lillian                  | Class Sponsor                         |
| Peterson, Amy                  | Class Sponsor                         |
| Peterson, Amy                  | Red Ribbon Coordinator                |
| Rush, kay                      | Class Sponsor                         |
| Rush, Kay                      | JH Student Council Advisor            |
| Smith, Tyson                   | Class Sponsor                         |
| Smith, Tyson                   | Club Sponsor - Hot Rod                |
| Smith, Tyson                   | Club Sponsor - Skills USA             |
| Westover, Jennifer             | HS Student Council Advisor            |
| Whetten, Anthony               | Class Sponsor                         |

# Employment Renewals

2025-26

*Recommended for approval 6/10/2025*

| <b>Coaches/Athletics</b> |  |
|--------------------------|--|
| <b>Name</b>              | <b>Assignment</b>                      |
| Beatty, D.J.             | 8th Grade Boys Basketball Head Coach   |
| Beatty, Kristen          | HS Volleyball Assistant II Coach       |
| Brawley, Lyndzi          | HS Track Assistant II Coach            |
| Brawley, Micah           | HS Girls Basketball Assistant II Coach |
| Brawley, Micah           | HS Track Head Coach                    |
| Bushman, Dan             | HS Girls Basketball Head Coach         |
| Fischer, Brad            | HS Wrestling Head Coach                |
| Fish, Dustin             | HS Boys Basketball Assistant II Coach  |
| Fish, T.C.               | HS Baseball Head Coach                 |
| Gayer, Lisa              | HS Wrestling Assistant II Coach        |
| Kelley, Dana             | 8th Grade Girls Basketball Head Coach  |
| Miller, Charlsye         | HS Volleyball Head Coach               |
| Miller, Eric             | HS Boys Basketball Head Coach          |
| Murphy, Tyler            | HS Baseball Assistant II Coach         |
| Peterson, Amy            | JH Track Head Coach                    |
| Rice, Erik               | HS Football Assistant II Coach         |
| Spurlock, Mary           | 8th Grade Softball Head Coach          |
| Spurlock, Mary           | HS Softball Assistant II Coach         |
| Westover, Jennifer       | Cheer Sponsor (Football)               |
| Whetten, Anthony         | Drama Assistant Coach                  |
| Whetten, Jason           | Drama Head Coach                       |

# Volunteer Renewals

2025-26

*Recommended for approval 6/10/2025*

| <b>Coaches/Athletics</b> |                   |
|--------------------------|-------------------|
| <b>Name</b>              | <b>Assignment</b> |
| Baldwin, Cameron         | Volunteer         |
| Bushman, Jessi           | Volunteer         |
| DeWitt, Lexi             | Volunteer         |
| Fish, Kevin              | Volunteer         |
| Frost, Katie             | Volunteer         |
| Hutchens, Daniel         | Volunteer         |
| Hutchens, Seth           | Volunteer         |
| Isaacson, Taura          | Volunteer         |
| Johnson Zane             | Volunteer         |
| Kelley, Dayna            | Volunteer         |
| Miller, Charlsye         | Volunteer         |
| Miller, Cody             | Volunteer         |
| Miller, Layne            | Volunteer         |
| Neill, Aaron             | Volunteer         |
| Penrod, Tyler            | Volunteer         |
| Sander, Jorge            | Volunteer         |

**5. SUPERINTENDENT'S REPORT**  
Report

## Joseph City Unified Governing Board Meeting Report

July 8<sup>th</sup>, 2025

### Updates and Current Events

Prepared by: B. Fields

- The team that uses our campus for their summer FB Camp will be here starting on Monday, July 7<sup>th</sup>, and it looks like we will be ready for them. We have purchased a robot field lining machine which should be beneficial for the maintenance department. It arrived last week.
- The summer programs are going well and some of them have already ended. Our KinderCare program ended with a spectacular “Bridging Over to Kindergarten” celebration on June 19<sup>th</sup>. It was fantastic and I’ve heard many compliments about these programs and I would like to offer my sincere gratitude for the Elementary staff who help with these and other similar programs.
- The trip to Bearizona for the Elementary summer school students was an incentive and concluded without a hitch.
- Our testing scores are in but they did not add the “Student Growth Percentiles” until recently, which impacts scores and categories. I plan on having a summary for you in August. The Principals and I have reviewed the patterns that we can identify and the areas connected to the standards that students scored low in to develop some interventions and strategies that will address the low performance at some of the grade levels and in some of the respective content areas.
- The Player family had asked to address the Board at this meeting, however, I have recently been notified that they no longer need to meet with me or the school board.
- As an effort to support the new statutory requirements about electronic devices we are planning to implement the cell phone plan that I’ve attached to this report. This plan is for our Junior High-High School Campus. Some minor changes may be made to it prior to the start of the year. If you would like to provide any input or feedback on this plan feel free to do so. We are willing to consider any suggestions.
- The revised grading plan set up for the teachers at the Junior High and High School will also be attached to this report for your review. We are making these changes to address concerns with improving communication between the school and home, and consistency between students, and classes.
- The athletic coaches’ handbook has been reviewed and updated. We would like the new AD to have the opportunity to provide feedback before it is officially published online and to staff. I will see if I can get a draft copy of where we are at with it attached to this report for your review. We are also working on updating the New Employee Handbook, and General Employee Handbook for all staff finalized before the start of school.
- I would like to offer a big thank you and recognition to the summer staff who continue to keep the school campuses operational, and summer programs as relevant and viable for our students and community.

## **Joseph City Jr.-Sr. High School Cellphone Plan for the Upcoming 2025-26 School Year**

Students should not possess a cell phone or other personal device, such as a watch with internet access, in any class during the instructional day.

Students will begin each semester with 50 Cell Phone points in each class.

Parents will be contacted by the High School Office after 25 points have been deducted from the student's grade in any one class for the semester in order to address the student's defiant attitude, and subsequent consequences that will be forthcoming.

### **Bonus Points For A Limited Time Only!**

Every student starts with 50 Cell Phone points towards their grade in each class at the Junior-Senior High School. These points will be directly counted into each students' semester grade.

If a student never possesses a cell device in class they will not have any deduction taken from their 50 points, and these points will be added/included into the student's overall course grade.

25 points will be deducted from these 50 points if a teacher identifies that a student possesses a cellular device (e.g. phone or watch) during instructional time.

Example: A student has a cell phone that rings or the teacher makes direct visual contact with. The teacher asks the student to put the phone away, student complies, and then the teacher makes a note to themselves to enter, as a deduction, of 25 points for that student's semester Cell Phone grade points (total of 50 per student). The teacher should notify the Principal when any student is down to 25 Cell Phone points, so that the Principal can start to make preparations to contact the parents for a conference.

### **Principal's Conference with Parents/Students**

- Request from the parent an opportunity to explain why this has occurred, or why it is reoccurring in regards to their student.
- Consider any comment the student would like to make, or has made, in the presence of his or her parents at the meeting with school administration.
- Ask if the parents have a plan to help prevent this from continuing to happen.
- Assess the level of cooperation that we can expect from them and their child in regards to the new state law and try to determine if the parents seem willing to support us in changing their child's behavior, or if they are supporting the illegal and defiant attitude of their child.
- Proceed with appropriate actions, which shall proceed as follows:
  1. At zero cell phone points, the student receives 4 days of after school detention or Friday tutoring. Decided by the Principal
  2. Short-term Off-Campus Suspension. Days to be determined by the Principal.
  3. Long-term Suspension or Expulsion, decided by the Principal.

Parents and students should be aware that by not complying with the new cell phone policy it will impact their grades. This will occur as they originally lose points directly for their behavior, and continue to lose points as they miss valuable class time through suspensions, attendance and participation points.

DRAFT

## Joseph City Schools

### Grading Procedures 2025 – 2026

#### Student Grades Plan Implementation Goals

- Develop students' understanding of the appropriate curriculum to the 'proficiency' level, and to quantify and document student skills and understanding as accurately as we can.
- Accurately reflect the students' understanding of curriculum concepts, participation and engagement, as well as their consistent work efforts throughout the time span of the course.

#### **Terminology:**

**W.S.:** Work sheet, hand-out, or a form that the student would complete on a computer.

**Participation:** This term is used in addressing how we are measuring and reflection of students' willingness, as well as their appropriate participation or engagement level as well as how they interact with others.

**Higher-order Thinking:** Higher-order thinking refers to cognitive processes that go beyond basic recall and comprehension, involving more complex skills like critical thinking, problem-solving, and creativity. These skills are essential for understanding and applying knowledge in new contexts and for developing innovative solutions.

**Assessments:** Any test, quiz, summative, or formative tool that is used to determine students' background knowledge, skill, knowledge, or ability to communicate understanding of student learning objectives.

**Assignments:** Assignments include anything that students complete in a class that is being quantified and is not an assessment.

**Homework:** Term is in reference to work that the student didn't complete in class, or reviewing on their own for an upcoming assessment, or an assignment that has been given to complete outside of class. Homework that presents new material that hasn't been taught yet should be limited.

**Prompt Engineering:** the practice of crafting effective prompts to get desired outputs from AI models, especially large language models (LLMs). This helps to clearly convey intent, context, and format to the AI, enabling it to generate more accurate, relevant, and safe responses.

**LLM:** Large Language Model commonly referred to as AI.

**Coursework:** Any effort that students put into a course which is documented by the teacher.

## **Knowing What Your Assessments and Assignments Scores Are Reflecting**

### **Higher-order Thinking Skills:**

Unwrapping/Analytical review; pattern-recognition; critical analysis; categorizing; compare and contrast; creative writing; self and peer awareness and reflection; application of math and science-based processes; cross curricular activities; evidenced-based research; inductive and deductive reasoning; and the application of basic skills.

### **Basic Skills:**

Reading; memorization; comprehension; writing; standard mathematics applications; vocabulary; spelling; communicating; collaboration; work ethic; participation; practice; drills and frequent repetition.

The "**Coursework**" and "**Assessment**" in every gradebook should be quantifiable and balanced.

Select '*Coursework*' or '*Assessment*' on everything that you enter into the gradebook.

**"Coursework"** or **"Assessment"**

If "**Coursework**" is selected, you then choose one of the following as a subcategory:

- '**Participation**' (10pts);
- '**HW**' (5pts);
- '**Basic Skills**' (10pts);
- '**Higher-order**' (10pts).

If you select the option of "**Assessments**", you then choose one of these two options:

- '**Formative**' (20pts)
- '**Summative**' (100pts)

The teacher then enters a written note on what they've selected and what the student earned on the "*coursework*" or the "*assessment*".

**Reflective Questions:**

1. What do I expect my students to come to class prepared to do?
2. How clearly do I communicate what students are doing in my class?
3. Which basic and higher-order skills am I providing throughout my course, and why?
4. What should I include the in the assignment notes?
5. How clear is the documentation in my grade book to someone who has no context for what your coursework and assessment grades display?

**Teacher Expectations:**

No more than 2 participation 'coursework' grades per week.

At least 1 higher-order level 'coursework' grade per week.

'Coursework' scores will be designated and auto filled as:

|                      |              |
|----------------------|--------------|
| <i>Participation</i> | <i>10pts</i> |
| <i>Higher-order</i>  | <i>10pts</i> |
| <i>Basic Skills</i>  | <i>10pts</i> |
| <i>HW</i>            | <i>5pts</i>  |

Each documented 'coursework' or 'assessment' should include clarifying notes from the teacher of what the student score represents.

A minimum of 1 'assessment' score entered every 3 weeks that is designated as some type of 'assessment'.

'Assessment' scores will be designated and auto filled as:

|                  |               |
|------------------|---------------|
| <i>Formative</i> | <i>20pts</i>  |
| <i>Summative</i> | <i>100pts</i> |

### Sample Listing for 1 week of Grading

| <b>Title</b>             | <b>Category</b>      | <b>Notes</b>   | <b>Points (auto filled)</b> |
|--------------------------|----------------------|--|-----------------------------|
| <b>Coursework</b>        | <i>Basic Skills</i>  | Chap 7, sect 1&2;<br>Review Ques 1-7 and 1-6                               | 10pts                       |
| <b>Coursework</b>        | <i>Participation</i> | Lecture w/notetaking   | 10pts                       |
| <b>Coursework</b>        | <i>Higher-order</i>  | Compare & Contrast<br>Industrial Revolution                                | 10pts                       |
| <b>Assessment</b>        | <i>Formative</i>     | Kings of Industry  | 20pts                       |
| <b><u>(Homework)</u></b> |                      |  |                             |
| <b>Coursework</b>        | <i>HW</i>            | Ch. 7 Review Test Study Guide<br>w/notes returned prior to taking the test | 5pts                        |

In this sample the student received a score every day in class, for a total of 35 pts possible for 'coursework', and 20 'assessment' points for the week. A total of 55 points for the week.

If a teacher followed this sample every week they could end the semester with all 'coursework' approximately at 600 points. The amount of about 1 -2 'assessments' every three weeks could easily be approximated at 600 points. This would total 1200 points for your course for 1 semester.

## **Problems and Risks of Technological Advancements and Cell Phones in Schools**

Students become distracted in classrooms during instructional time.

Looking for “cheat codes” to replace the appropriate learning process which build intellectual abilities and experiences.

Doesn't facility us in teaching focus, deep-thinking, sleeping well, ability to read and learn from books, self-esteem, patience, how to interact appropriately in-person, conscientiousness, and the cost of lost opportunities.

Impairing cognitive development.

By providing our children with access to everything, is that now everything also has access to our children. Our children are still in a very formative time in their lives and much more susceptible to indoctrination, fraud, propaganda, and misinformation.

Mental illness and self-harming has spiked with access to smart phones. It appears that more children have less confidence because of screen time and social media. We should build confidence in children.

A dopamine ignition is available to our children on an at-will basis.

Various safety concerns, screen addiction, and social media addiction.

Experts have made it clear that research shows that children should not have more than 1-2 hours of screen time per day.

Teachers should focus on human skills such as reading, empathy, concentration, creative expression, eloquent and humorous discussions, coping, managing and overcoming stress, critical thinking, deep thought, foster imagination, and understanding of the overall human condition.

Handwriting installs learning into the brain more effectively than cutting, copying, pasting, and typing.

Friction and struggle are a necessary part of the learning process and growth.

# JOSEPH CITY

## Jr/Sr High School



# Activities Handbook 2025-26

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# NATIONAL CODE OF ETHICS

FOR

## HIGH SCHOOL ACTIVITIES SPONSORS

### AS A PROFESSIONAL EDUCATOR I WILL:

- Exemplify the highest moral character, behavior, and leadership.
- Respect the integrity and personality of the individual athlete.
- Abide by the rules of the game in letter and spirit.
- Respect the integrity and judgment of sports officials.
- Demonstrate a mastery of continuing interest in coaching principles and techniques through professional improvement.
- Encourage a respect for all activities and their values.
- Display modesty in victory and graciousness in defeat.
- Promote ethical relationships among coaches and colleagues.
- Fulfill responsibilities to provide health services and an environment free of safety hazards.
- Encourage the highest standards of conduct and scholastic achievement among activity students.
- Seek to include good health habits (the establishing of sound training rules).
- Strive to develop in each student the qualities of leadership, initiative, and good judgment.

THE NATIONAL COUNCIL OF STATE HIGH SCHOOL COACHES ASSOCIATIONS,  
AMERICAN ASSOCIATION FOR HEALTH, PHYSICAL EDUCATION, AND  
RECREATION --- NEA

## PHILOSOPHY

**At Joseph City Junior/Senior High School we believe extracurricular activities are an integral part of a student's life.** Extracurricular activities are to enhance the learning opportunities for the students. Winning the contest and performing well are of great importance and the goal is to give your best to win the contest or perform to the best of your ability. As important as winning and producing a flawless performance are, they do not replace all other goals. The program should not sacrifice an ethical-like quality. The main purpose of sports at Joseph City Junior/Senior High School is to promote the physical, mental, moral, social and emotional well-being of the student-athletes through aspects of contests and performances.

**Extracurricular activities are an extension of the classroom; thus they should work to assist academic achievement.** Extracurricular activities should also promote citizenship in both the school and community. Student-athletes, performers, directors, sponsors, and coaches are constantly observed. The goal of our program is that our students be role models both on and off the field or stage, within the school and the community. Extracurricular activities are an opportunity to practice principles of life, such as subjecting oneself to authority, working together as members of a team or cast, and controlling the emotions that arise in competition and performances. It is important in life to learn to live with both success and adversity.

**Coaches, directors, teachers, and administrators are role models for the students. The best way to lead is to lead by example.** The coach and director (hereinafter referred to as coach) performs a critical role in the development of the student's desire to reach his or her fullest potential. Coaches should always be enthusiastic and prepared each day for practices, performances, and games and have a schedule of events to help all students reach their fullest potential. Students may feel cheated by a coach, or official. This is when the coach should be in control and display leadership. The coach is in control of the team or cast during all circumstances relating to competition or performance and the school. The students are responsible each day to be prepared to work towards their fullest potential, respect others, and follow their coaches' directions.

**The goal and motivation for each student should be to perform at his or her personal best to help the team or cast achieve its goals.** Students should strive

to achieve goals through competition and performances. However, they should pursue individual goals through the team concept. The student should not be pressured to perform for friends or family.

## **DUTIES OF ACTIVITY PERSONNEL**

Coaches, directors, and sponsors are reminded that we operate under four sets of rules and regulations, each supplementing the other. They are: **1)** The A.I.A. Handbook, **2)** The 1A North/Central Region constitution and by-laws, **3)** the NFHS rulebooks, and **4)** The District Board Policy Handbook including the following duties:

### **Program**

1. To develop major responsibilities and specific program objectives for his/her activity.
2. To supervise practices with particular emphasis on safety.
3. To supervise locker rooms, facilities, and buses.
4. To be the last one to leave practice/competition areas after practice sessions and games.
5. To attend coaches' meetings.
6. To carry out duties in harmony with all policies of the school district.
7. To handle all injuries with care and to report serious injuries to the Athletic Director, principal, and doctor **and to fill out an accident form and document the incident and turn in the accident report by the end of the next school day.**
8. To recommend letter awards. This recommendation is to be submitted by email and should contain adequate information for the school's records. It is to be submitted to the activities secretary.
9. To turn into the A.D. a summary of the activity coached. It should include a schedule of performances or games, name of coach and assistants, any special recognition to team or individuals, and available summaries of statistics, and any special recognition given to the team or individuals on the team (i.e. all-section awards, etc.).
10. Each athletic coach needs to enter the team roster, scores, and statistics to MaxPreps.com.
11. It is the duty of the head coach to assist all levels with regard to coordination of teaching methods for that particular activity.
12. To report scores and summaries of contests to the A.D. and newspapers.
13. To recommend non-league opponents.

14. To emphasize performing and winning with honor and to teach players that when a loss occurs it must be accepted gracefully. Any act of unsportsmanlike conduct reflects on the entire Joseph City Activities program. All coaches and activity sponsors should set the example necessary to insure good sportsmanship.
15. Coaches should not emphasize one extracurricular activity at the expense of other activities.
16. All coaches must demonstrate loyalty to each other in public.
17. All coaches should encourage students to go out for the activity of their choice.
18. All coaches and activity sponsors should support the principal and assist all faculty with special student problems.
19. All coaches should encourage their squads to support other Joseph City teams.
20. All coaches and activity sponsors' main concern should be the health and welfare of the students.
21. **ALL COACHES SHOULD BE AWARE OF THE ADVANTAGES OF GOOD RELATIONS WITH:** school personnel, students, community and opponents.
22. All coaches verify that all equipment is properly secured.

### **Equipment**

1. All Coaches must assume responsibility for all equipment furnished by the school in the activity assignment.
2. Head coaches issue equipment, take care to store equipment after each activity, and maintain an inventory of equipment. At the end of each season a copy of these inventories will be turned in to the A.D.
3. All coaches should verify that equipment is not being misused or misplaced.
4. Head coaches should prepare requisitions for replacement of and additions to inventoried items and submit these requisitions to the A.D.

### **Facilities**

1. Head coaches initiate work orders necessary for proper game and practice conditions.
2. Head coaches should make recommendations to the activity director concerning new facilities and improvements to existing facilities.
3. All coaches help in the maintenance of clean and orderly facilities.
4. The A.D., coaches, and custodians are responsible for securing facilities at the conclusion of an activity, including turning lights off and locking up.

### **Training Room and Supplies**

1. All coaches should keep the supply room locked when not in use.
2. All coaches see that students are not left unattended in the supply room.

3. All coaches **must** see that **no student** uses the whirl-pool without proper supervision.
4. All coaches should keep things in their proper order, scissors, tape, cutters, tools, first aid kits, etc....Supplies are costly. Take care not to use them excessively.

**Trip Preparation: (Transportation, meals, and lodging)**

1. The school only provides meals and lodging for trips during state tournament play. Meals and lodging will be coordinated through the activities director.
2. Estimated team meal expenditures will be calculated based on the total number of students and adults participating in the trip. The following rules apply:
  - a. The first meal for each trip will be provided by the student.
  - b. Dollar cost of meals will not exceed the authorized amount specified in Board Policy (Students may supplement meal costs at their expense.).
  - c. Special requests for meals will be considered when unusual circumstances occur.
3. Head coaches should check with the A.D. to assure that meal money has been requested at least one week in advance of any trip. Head coaches should pick up meal money from the District Office. Coaches must bring back receipts for all expenditures (District Policies concerning these procedures can be obtained through the district business manager.). All receipts and unused money are to be returned to the high school office within one day after returning.
4. Activity sponsors must turn in a list of all players, managers, coaches and anyone else making the trips at the beginning of the season. This list must be kept current and turned into the athletics secretary at the high school office.  
**The activity sponsor/coach is discouraged from taking their own children or anyone who is not directly connected to the activity and who might distract from the assigned duties and responsibilities.**
5. Coaches should meet with the A.D. to determine departure and return times. If there is a problem with this estimated release and leave time, suggested adjustments need to be made at the beginning of the season.
6. Activities sponsors/coaches are to travel with their teams and maintain order on the bus, at the scheduled area of participation, and in all areas at all times.

**Administrative Regulation**

**Trips**

1. All students participating in an activity must ride on the bus to and from each activity except in the case of the following exceptions:
  - a. A student may return home from an event with a **parent** only, if the student is signed out by said parent.
  - b. A student may travel home with someone other than their parent if the parent has completed the proper paperwork and received approval from the high school office 24 hours prior to the trip.
  - c. The student may travel to and from an event with a parent if approved by administration.
2. Students participating in an activity trip shall complete the trip under school jurisdiction unless excused by the administration or sponsor/coach upon proper notification by a parent or guardian.
3. Any variation from the above must be arranged through the administration prior to leaving for the activity.
4. A coach from each team must remain awake during the trip, check on students frequently, and be able to hear.

### **Booster Clubs**

These are organizations of parents and interested community members whose function is to provide support for school activities. All requests for assistance from a booster club must be coordinated through the Activities Director.

### **No Pass/No Play: Extracurricular Participation**

In order to emphasize academics and maintain a proper perspective relative to extracurricular activities, we at JCUSD will adhere to the following procedure concerning academic eligibility.

Participants shall maintain a passing grade in all their classes and be progressing toward graduation.

Student progress will be reported at the end of three week monitoring periods.

Only students earning passing marks (60% or above) in all classes will remain eligible.

- Any class change may affect the student eligibility. Check with the office before finalizing any class changes.
- Unique individual circumstances may be reviewed by the administration.

### **Academic Monitoring Program**

- All students' grades will be monitored every three weeks and students who are failing will be notified. The teacher will issue failing notices or report cards. Parents and coaches/sponsors will be notified.
- Academic assistance will be available. Students should check with their individual teachers.

- If failing at a three week check a student will become ineligible for a minimum period of one week, normally beginning the following Monday and ending Sunday. This includes all extracurricular events. A grade brought up to passing will allow the student to become eligible after this one-week period.
- If a student is failing for two consecutive three-week grade checks in the same course, that student will be declared ineligible for the remainder of the current season.
- Failing a class at the semester check will result in one week of ineligibility at the beginning of the second semester
- Failing a class for the spring semester will result in the student being ineligible for one contact in the fall activity.
- To be declared eligible, the student must have the teacher(s) sign a note verifying passing status. This note must then be turned in to the athletic director who will issue clearance. The student will then take the clearance note to the coach/sponsor.
- A student who is losing credit due to excessive absences may not practice or play until the circumstances have been resolved.
- Grades will be submitted by teachers on Wednesday to the attendance secretary.
- Grades will be determined on a cumulative basis, from the beginning of instruction to the recording of a final semester grade.

### **Remediation**

Students experiencing academic difficulty may receive assistance through a variety of resources which include, but are not limited to the following:

1. Faculty tutor programs.
2. Individual assistance from teachers.
3. Guidance services.

### **Coaches' Responsibility**

1. Students interested in participating in an activity must obtain an athletic clearance from the high school secretary and athletic director. The student must complete the following steps:
  - a. Parental permission and signatures on required documents
  - b. Physical examination
  - c. Birth certificate on file
  - d. Proof of insurance
  - e. Academic eligibility
  - f. Pay participation fee

2. Coaches are required to verify that each athlete has met the eligibility requirements. This will be done by signing in to Final Forms and checking each athlete's status.
3. **No student may participate in practice or competition without the coach having verified his/her eligibility on the Final Forms app.**
4. At the beginning of each season the head coach of each sport will be required to fill out a roster.
5. This roster is to be turned into the athletics secretary at least ten days before the first scheduled contest. This roster may include player's number, height, weight, grade and position. This roster must also be entered into Maxpreps.com for the varsity team.
6. All additions to the roster must follow the same procedure as above.
7. Meet with the AD within 2 weeks of the end of their season of sport.

## **Students' Responsibility**

Prospective students must meet the following eligibility requirements before they can start practice.

1. Have permission of parents or guardians to participate and complete registration through Final Forms.
2. Have a physical examination by a physician (sports only). Physical exam forms must be filled in and signed by the Physician and by one of the athlete's parents or guardians.
3. Have school insurance, or family insurance.

### **Insurance:**

All students participating in interscholastic athletic activities are required to have insurance protection. Students are encouraged to purchase insurance provided by the school in the event they are not covered by family insurance.

### **Waiver:**

Students may meet the insurance requirement by filing an insurance waiver signed by their parents or legal guardians. The waiver must include the insurance company name and policy number.

4. Meet the academic requirements of Joseph City Schools and AIA policy.
5. Have a birth certificate on file in the high school office before participating.
6. Injuries:  
The student should notify the coach before going to a doctor for an injury received during practice or competition. School insurance will only cover the student in this situation.

## **Training Regulations for Activity Students**

### Attendance

Students must be in school all day on the day of an activity. Any exception to this rule must be cleared through the principal's office or with the activities director. It is the students' responsibility to get the clearance.

### Practice Policy

Practices shall end by 9:00pm.

Regarding fall and spring sports/activities, practices from Monday through Friday shall end by 6:30pm.

The day before a game, using good judgment a team may decide to practice late during this time frame: 5:30pm-8:45pm.

No practices shall be longer than 2 ½ hours.

These rules exclude games, performances and dress rehearsals.

### Practice Attendance

Students should not miss practice without good reason. **Excused absences must be cleared in advance.** Any student who misses practice without good reason may be subject to dismissal from the squad.

### Open Facilities

Joseph City High School may conduct open facilities during the school year. The open facilities will follow the guidelines outlined in the Arizona Interscholastic Association Constitution and Bylaws. In addition to these guidelines Joseph City High School will also include these rules:

1. The open facility will begin after the first week of the sport in-season and will end at the official start date of the next season.
2. All students will be allowed to participate in the open facilities program (although high school and junior high students must have separate events- they cannot participate in open facilities together during the school year). A coach of the sport in season can restrict his/her players from participating in the open facilities program.
3. If a student quits or is dismissed from a sport, they shall not participate in open facilities during the season of that sport.
4. Open facilities will be limited to two days a week per sport.
5. Facilities will be available for no more than 1½ hours per night.
6. Coordination of facility use will be done through the Athletic Director's Office.
7. Sport in-season will have priority over any use of facilities.

### Release from an Activity

Any student who is dismissed from or quits an activity **will not** be permitted to go out for another activity until the activity he/she was dismissed from is completed. (Exceptions: Coaches or sponsors may release the student if the reason(s) are

appropriate and do not involve misconduct, rule or regulation violations, and is within the first two weeks of practice.) Any dismissal should be discussed with the athletic director before it occurs.

### **Concurrent Participation:**

Students who meet the following criteria may participate in more than one activity concurrently.

1. Meet all eligibility requirements
2. Meet with the Athletic Director to discuss the following:
  - a. The commitment that it will take to participate in two sports.
  - b. Declare a primary activity and assuring the primary activity takes precedence when conflicts occur with the secondary activity. The student has two weeks from the first day of practice to declare a primary activity.
  - c. Understand that dismissal or quitting for disciplinary reasons from either activity will result in the student being eliminated from further participation for the remainder of the season of both activities.
3. Receive permission from coaches for their concurrent participation.
4. Obtain a clearance card for each activity.

### **Tobacco, Alcohol and Drugs**

Any student using, possessing or providing tobacco, alcohol or illicit drugs during the season of competition will be subject to dismissal from the activity. This includes all forms of tobacco. This rule must be enforced equally in all sports and by all coaches. Repeat violators will be eliminated from participation for the following two activity seasons. Coaches please remind students that they must take caution to avoid even being in the same car as drugs or alcohol as this will be a violation of school policy.

### **Team Rules**

It is important that rules and regulations be spelled out and made known to the athletes and their parents prior to student participation. A copy of all rules and policies will be given to the activities director at the beginning of the season for review and approval. A copy of all rules and policies will be given to each participant to be taken home and signed by a parent or guardian and returned to the coach for documentation. Documentation must be kept on file by each coach.

### **Discipline of Participants**

All school rules apply during extracurricular activities.

If an unsportsmanlike, technical foul, or similar violation is called by the official of the game to a student, the following shall occur:

1. The student is taken out of the game immediately.
2. The coach or sponsor may hear the student out when time allows and when the coach is prepared to listen.

3. The coach/sponsor shall hear the side of the student, use questions to see if the student has his/her mental, emotional, and self-awareness under control. This can happen during, or after a game or competition event, and scheduled at the coach's or sponsor's discretion.
4. The coach will then proceed to administer further discipline, or not, based on his or her own judgement. A summary of the incident and subsequent actions should be presented to the athletic/activities director in a written summary within 2 days of the incident.
5. Further student discipline for these types of violations are:
  - Suspension from games or practices
  - Meeting with the students and his/her parent/guardian
  - Placed on probationary status
  - Return to participation as usual

When anticipating disciplinary action, the following should be considered:

1. Seriousness of the offense
2. Circumstances
3. Length of time since students last infraction
4. School's past action in similar cases

### **Written Report**

A written report of any serious action taken must be submitted to the activities director within one working day of the occurrence of the incident. Examples of serious actions would be dismissal from teams or unsportsmanlike conduct.

### **Student Due Process/Grievance Procedures**

If a student or parent has a complaint or problem concerning activities, the following steps will be followed:

1. Student goes to the coach or sponsor of the activity.
2. Student goes to parent.
3. Student and Parent/Guardian goes to coach.
4. Student and Parent/Guardian goes to the activity director.
5. Student and Parent/Guardian goes to the principal.
6. Student and Parent/Guardian goes to the superintendent.
7. Student and Parent/Guardian goes to the governing board.

### **Chain of Command for Solving Problems**

Below is the organizational order that should be followed and honored by all parties involved:

1. Student Participant
2. Coach or Sponsor

3. Activities Director or Designee
4. Principal
5. Superintendent
6. Governing Board Members (Collectively)

### **Awards and Policies**

1. Varsity letter to those participants who meet the requirements of the individual sports. Letters will be awarded according to an established criterion.
2. An activities participant will receive one athletic chenille during their high school career.
  - a. Each subsequent award for lettering will be a certificate.
  - b. A student may earn an academic and/or music chenille in addition to an athletic chenille when the student has met the academic and/or music criteria.
3. Any student athlete who participates, but does not earn a letter, will receive a participation certificate (This may include junior varsity awards).
4. Special awards (for team members) may be awarded to championship teams, or runner up at the state level only.
5. These awards will be presented at athletic socials or banquets following the season of participation.
6. Student participants who meet the AIA standards will be eligible for the AIA scholastic individual and/or team awards.
7. Monies for plaques, trophies, and other awards will be budgeted. All awards which are purchased out of the activities funds must be approved by the activities director.

### **Athletic/Activity Socials/Award Banquets**

#### **Blue and Gold Banquet:**

1. At the end of the school year the athletic department will host the Blue and Gold Banquet to recognize all high school athletes.
2. Each coach will be required to attend the banquet and will be responsible for presenting all awards/plaques/letters for his/her team.
3. Male and female athletes of the year will be presented at the Blue and Gold Banquet.
4. Each athlete will be given a ticket to the banquet and will be able to bring two guests.
5. The banquet will be a semi-formal event (No shorts. No sandals. Shirt with a collar).
6. Dinner will be provided by the cafeteria.

#### **Other Awards Ceremonies**

1. All other socials will be in honor of participants in music, academic decathlon, academics, etc. and will be scheduled at a time appropriate to the conclusion of the activity.
2. Additional ceremonies must be cleared and scheduled through the activities director.
3. Planning, organization and implementing these socials will be the mutual responsibility of the coaches and sponsors under the supervision of the activities director.
4. All dates, times, and places must be scheduled through the activities director and approved by the principal.
5. School funds will not be used to pay for the social unless funds have been raised by clubs specifically for that purpose.
6. The purchase of awards must be approved by the activities director and the principal prior to ordering.
7. A total of 4 plaques/awards may be given to varsity only.

## **Special Awards**

These awards may be presented at the Blue and Gold Banquet.

### **Athletes of the Year**

These awards are given at the end of every school year by the Joseph City Activities Department to the outstanding boy and girl athlete for that year. This award will be an individual plaque for each winner.

The criteria for nominations are as follows:

Preference will be given to athletes who have –

1. been in three varsity sports
2. been a major contributor in all sports
3. a good attitude and show respect for all school personnel, people in general, rules and policies
4. a good work ethic on and off the field

Joseph City High School coaches and activities personnel will nominate athletes for these awards and make final selections.



**Summary of Financial Operations (Unaudited)**  
**June 30, 2025**

| Fund         |   | Budget               | YTD Expenses        | Encumbrances      | Budget Balance      |
|--------------|---|----------------------|---------------------|-------------------|---------------------|
| 001          | Maintenance & Operation                           | \$5,366,034          | \$5,223,148         | \$ 109,050        | \$ 33,836           |
| 010          | Classroom Site Fund                               | \$1,378,054          | \$ 638,855          | \$ 7,452          | \$ 731,747          |
| 020          | Instructional Improvement                         | \$ 158,272           | \$ 79,672           | \$ -              | \$ 78,600           |
| 100-130      | Title I   | \$ 214,812           | \$ 179,477          | \$ 280            | \$ 35,055           |
| 140-150      | Title II - Profesional Development                | \$ 72,555            | \$ 7,238            | \$ -              | \$ 65,317           |
| 200-209      | Title VII - Indian Education                      | \$ 12,000            | \$ 11,122           | \$ -              | \$ 878              |
| 220-229      | IDEA/Special Education Grants                     | \$ 228,701           | \$ 126,870          | \$ 283            | \$ 101,548          |
| 230          | Johnson-O'Malley (JOM) - Indian Ed.               | \$ 4,500             | \$ -                | \$ -              | \$ 4,500            |
| 260-270      | Career & Technical Ed (CTE) - Federal             | \$ 18,825            | \$ 12,020           | \$ -              | \$ 6,805            |
| 290-291      | Medicare Reimbursement (Spec Ed services)         | \$ 155,036           | \$ 109,621          | \$ -              | \$ 45,415           |
| 301          | Az School Nurse Access Program                    | \$ 341               | \$ 250              | \$ 91             | \$ -                |
| 326-346      | ESSER   | \$ 333,815           | \$ 291,656          | \$ -              | \$ 42,159           |
| 374          | E-Rate  | \$ 75,000            | \$ -                | \$ -              | \$ 75,000           |
| 390          | REAP (Federal rural assistance grant)             | \$ 67,000            | \$ 60,534           | \$ 5,489          | \$ 977              |
| 400          | Career & Technical Ed (CTE) - State               | \$ 5,809             | \$ 4,717            | \$ -              | \$ 1,092            |
| 500          | School Plant (Proceeds from surplus equip sales)  | \$ 20,000            | \$ 3,209            | \$ -              | \$ 16,791           |
| 510          | Food Service                                      | \$ 378,000           | \$ 317,928          | \$ 58,363         | \$ 1,709            |
| 515          | Civic Center (Swimming pool community use)        | \$ 80,000            | \$ 38,880           | \$ 2,536          | \$ 38,584           |
| 520          | Preschool Tuition                                 | \$ 35,000            | \$ 4,880            | \$ 18             | \$ 30,102           |
| 525          | Auxiliary Operations (Bookstore, athletics, fees) | \$ 140,000           | \$ 126,533          | \$ 1,102          | \$ 12,364           |
| 526          | Extracurricular Activities Tax Credit             | \$ 50,000            | \$ 12,366           | \$ 253            | \$ 37,380           |
| 530          | Gifts & Donations                                 | \$ 550,000           | \$ 64,049           | \$ 570            | \$ 485,381          |
| 535-539      | CTE & Vocational Education Projects               | \$ 30,000            | \$ 13,501           | \$ -              | \$ 16,499           |
| 550          | Insurance Proceeds (from claims)                  | \$ 75,000            | \$ 7,295            | \$ -              | \$ 67,705           |
| 565          | Litigation Recovery                               | \$ 30,000            | \$ -                | \$ -              | \$ 30,000           |
| 570          | Indirect Costs (Grant administration costs)       | \$ 163,185           | \$ 139,846          | \$ 17,639         | \$ 5,700            |
| 585          | Insurance Refunds (premium discounts)             | \$ 39,000            | \$ -                | \$ -              | \$ 39,000           |
| 596          | NAVIT   | \$ 270,000           | \$ 238,285          | \$ 16             | \$ 31,699           |
| 610          | Capital Outlay                                    | \$ 317,554           | \$ 286,190          | \$ 5,588          | \$ 25,776           |
| 620          | Adjacent Ways                                     | \$ 196,084           | \$ 7,746            | \$ -              | \$ 188,338          |
| 665          | Energy and Water Savings                          | \$ 180,000           | \$ 138,901          | \$ -              | \$ 41,099           |
| 686          | SFB Emergency Deficiency Correction               | \$ 60,000            | \$ -                | \$ -              | \$ 60,000           |
| 691          | SFB Building Renewal Grant                        | \$2,000,000          | \$ -                | \$ -              | \$2,000,000         |
| 850          | Student Activities (clubs and classes)            | \$ 60,000            | \$ 42,664           | \$ -              | \$ 17,336           |
| <b>TOTAL</b> |   | <b>\$ 12,764,577</b> | <b>\$ 8,187,454</b> | <b>\$ 208,731</b> | <b>\$ 4,368,392</b> |

## **6. REQUESTS TO SPEAK TO THE GOVERNING BOARD**

The procedure for addressing the Board in a public meeting may be viewed here: <https://josephcityaz.sites.thrillshare.com/page/public-comments>

## **7. CONSENT AGENDA**

Vote on Consent Agenda. All items listed will be considered as a group and will be approved with one motion unless a Board Member requests an item be removed from the consent agenda and considered as a separate item.

### **7.A. Approve Expense Vouchers**

Action to ratify district vouchers for the period 6/1/25 through 6/30/25.

**General and Special Funds:** ##27 \$63,857.28; #28 \$76,857.61; #29 \$104,227.89; #1043 \$80,818.43; #1044 \$88,248.34; #1045 \$53,008.04; #1046 \$62,626.89

**Auxiliary Operations Funds:** #1102 \$5,440.47; #1104 \$1,425.57; #1106 \$173.37; #1108 \$45,012.47

**Student Activities Fund:** #1103 \$3,049.21; #1105 \$350.00; #1107 \$8,293.30; #1109 \$800.00

### **7.B. Student Activities Fund Report**

Revenues, expenditures and charges in the Student Activities Fund Report; period of 6/1/25 through 6/30/25.

## Joseph City USD External Funds

### Student Activities Summary Report

Fiscal Year: 2024-2025

From: 6/1/2025

To: 6/30/2025

Print Detail

Page Break by Activity

Exclude Encumbrances

Reverse Signs

Subtotal By Journal

|  | Range Beg.<br>Balance | Range<br>Revenue | Range<br>Expenditures | Balance  | Encumbrances | Available Balance |
|--|-----------------------|------------------|-----------------------|----------|--------------|-------------------|
| 850.000.0000.0330.000.000 Unreserved Fund Balance            | .00                   | .00              | .00                   | .00      | .00          | .00               |
| 850.000.0000.0330.102.610 JH STUDENT COUNCIL Fund Balance    | 697.73                | .00              | (530.38)              | 167.35   | 530.38       | 697.73            |
| 850.000.0000.0330.102.612 JH SOFTBALL Fund Balance           | (11.39)               | .00              | .00                   | (11.39)  | .00          | (11.39)           |
| 850.000.0000.0330.102.619 JH VOLLEYBALL Fund Balance         | 507.27                | .00              | .00                   | 507.27   | .00          | 507.27            |
| 850.000.0000.0330.102.629 JH TRACK Fund Balance              | 260.11                | .00              | .00                   | 260.11   | .00          | 260.11            |
| 850.000.0000.0330.102.637 CLASS OF 2024 Fund Balance         | .00                   | .00              | .00                   | .00      | .00          | .00               |
| 850.000.0000.0330.102.638 CLASS OF 2025 Fund Balance         | .00                   | .00              | .00                   | .00      | .00          | .00               |
| 850.000.0000.0330.102.639 CLASS OF 2026 Fund Balance         | 2,533.94              | .00              | .00                   | 2,533.94 | .00          | 2,533.94          |
| 850.000.0000.0330.102.640 CLASS OF 2027 Fund Balance         | 1,657.52              | .00              | .00                   | 1,657.52 | .00          | 1,657.52          |
| 850.000.0000.0330.102.641 CLASS OF 2028 Fund Balance         | 499.64                | .00              | .00                   | 499.64   | .00          | 499.64            |
| 850.000.0000.0330.102.642 CLASS OF 2029 Fund Balance         | 2,138.74              | .00              | .00                   | 2,138.74 | .00          | 2,138.74          |
| 850.000.0000.0330.102.643 CLASS OF 2030 Fund Balance         | 445.66                | .00              | .00                   | 445.66   | .00          | 445.66            |
| 850.000.0000.0330.102.644 CLASS OF 2031 Fund Balance         | 1,313.00              | .00              | .00                   | 1,313.00 | .00          | 1,313.00          |
| 850.000.0000.0330.203.601 HS BAND Fund Balance               | 218.26                | .00              | .00                   | 218.26   | .00          | 218.26            |
| 850.000.0000.0330.203.602 HS BASEBALL Fund Balance           | 936.94                | .00              | .00                   | 936.94   | .00          | 936.94            |
| 850.000.0000.0330.203.604 HS DISC GOLF CLUB Fund Balance     | 473.52                | .00              | .00                   | 473.52   | .00          | 473.52            |
| 850.000.0000.0330.203.605 HS CHESS CLUB Fund Balance         | .00                   | .00              | .00                   | .00      | .00          | .00               |
| 850.000.0000.0330.203.606 HS CARD AND GAME CLUB Fund Balance | 146.14                | .00              | .00                   | 146.14   | .00          | 146.14            |

## Joseph City USD External Funds

### Student Activities Summary Report

Fiscal Year: 2024-2025

From: 6/1/2025

To: 6/30/2025

Print Detail

Page Break by Activity

Exclude Encumbrances

Reverse Signs

Subtotal By Journal

|   | Range Beg.<br>Balance | Range<br>Revenue | Range<br>Expenditures | Balance  | Encumbrances | Available Balance |
|---|-----------------------|------------------|-----------------------|----------|--------------|-------------------|
| 850.000.0000.0330.203.607 HS DRAMA Fund Balance                         | 725.11                | .00              | .00                   | 725.11   | .00          | 725.11            |
| 850.000.0000.0330.203.608 HS FUTURE BUS LEADERS OF AMERICA Fund Balance | 137.80                | .00              | .00                   | 137.80   | .00          | 137.80            |
| 850.000.0000.0330.203.609 HS GIRLS BASKETBALL Fund Balance              | 761.74                | .00              | .00                   | 761.74   | .00          | 761.74            |
| 850.000.0000.0330.203.610 HS STUDENT COUNCIL Fund Balance               | 6,987.62              | .00              | (1,503.79)            | 5,483.83 | 2,000.00     | 7,483.83          |
| 850.000.0000.0330.203.611 HS NATIONAL HONOR SOCIETY Fund Balance        | 477.97                | .00              | .00                   | 477.97   | .00          | 477.97            |
| 850.000.0000.0330.203.612 HS SOFTBALL Fund Balance                      | 1,541.37              | .00              | .00                   | 1,541.37 | .00          | 1,541.37          |
| 850.000.0000.0330.203.613 HS MOMENTUM CLUB/AUDITION CHOIR Fund Balance  | 1,419.15              | .00              | .00                   | 1,419.15 | .00          | 1,419.15          |
| 850.000.0000.0330.203.614 HS WRESTLING Fund Balance                     | 5,241.99              | .00              | .00                   | 5,241.99 | .00          | 5,241.99          |
| 850.000.0000.0330.203.615 HS CHEERLEADERS Fund Balance                  | 516.91                | .00              | .00                   | 516.91   | .00          | 516.91            |
| 850.000.0000.0330.203.616 HS WELDING Fund Balance                       | 136.33                | .00              | .00                   | 136.33   | .00          | 136.33            |
| 850.000.0000.0330.203.617 HS WOODS Fund Balance                         | 104.72                | .00              | .00                   | 104.72   | .00          | 104.72            |
| 850.000.0000.0330.203.618 HS BOYS BASKETBALL Fund Balance               | 1,414.77              | .00              | .00                   | 1,414.77 | .00          | 1,414.77          |
| 850.000.0000.0330.203.619 HS VOLLEYBALL Fund Balance                    | 12,892.19             | 889.95           | (6,789.71)            | 6,992.43 | .00          | 6,992.43          |
| 850.000.0000.0330.203.620 HS FACS Fund Balance                          | 35.74                 | .00              | .00                   | 35.74    | .00          | 35.74             |
| 850.000.0000.0330.203.621 HS HOTROD Fund Balance                        | (239.96)              | .00              | .00                   | (239.96) | .00          | (239.96)          |
| 850.000.0000.0330.203.624 HS BASKETBALL CHEERLEADERS Fund Balance       | .00                   | .00              | .00                   | .00      | .00          | .00               |
| 850.000.0000.0330.203.625 HS FFA Fund Balance                           | 939.07                | .00              | (193.69)              | 745.38   | 800.00       | 1,545.38          |
| 850.000.0000.0330.203.626 HS HAPPY CLUB Fund Balance                    | 880.07                | .00              | .00                   | 880.07   | .00          | 880.07            |

## Joseph City USD External Funds

### Student Activities Summary Report

Fiscal Year: 2024-2025

From: 6/1/2025

To: 6/30/2025

Print Detail

Page Break by Activity

Exclude Encumbrances

Reverse Signs

Subtotal By Journal

|  | Range Beg.<br>Balance | Range<br>Revenue | Range<br>Expenditures | Balance  | Encumbrances | Available Balance |
|--|-----------------------|------------------|-----------------------|----------|--------------|-------------------|
| 850.000.0000.0330.203.627 HS ROBOTICS CLUB Fund Balance      | 359.85                | .00              | .00                   | 359.85   | .00          | 359.85            |
| 850.000.0000.0330.203.628 HS CROSS COUNTRY Fund Balance      | 220.60                | .00              | .00                   | 220.60   | .00          | 220.60            |
| 850.000.0000.0330.203.629 HS TRACK Fund Balance              | 321.04                | .00              | .00                   | 321.04   | .00          | 321.04            |
| 850.000.0000.0330.203.630 HS FOOTBALL Fund Balance           | (65.42)               | .00              | .00                   | (65.42)  | .00          | (65.42)           |
| 850.000.0000.0330.203.631 HS TECHNOLOGY CLUB Fund Balance    | 109.95                | .00              | .00                   | 109.95   | .00          | 109.95            |
| 850.000.0000.0330.203.632 CLASS OF 2019 Fund Balance         | .00                   | .00              | .00                   | .00      | .00          | .00               |
| 850.000.0000.0330.203.633 CLASS OF 2020 Fund Balance         | .00                   | .00              | .00                   | .00      | .00          | .00               |
| 850.000.0000.0330.203.634 CLASS OF 2021 Fund Balance         | .00                   | .00              | .00                   | .00      | .00          | .00               |
| 850.000.0000.0330.203.635 CLASS OF 2022 Fund Balance         | 137.03                | .00              | .00                   | 137.03   | .00          | 137.03            |
| 850.000.0000.0330.203.636 CLASS OF 2023 Fund Balance         | 780.48                | .00              | .00                   | 780.48   | .00          | 780.48            |
| 850.000.0000.0330.203.637 CLASS OF 2024 Fund Balance         | 200.00                | .00              | .00                   | 200.00   | .00          | 200.00            |
| 850.000.0000.0330.203.638 CLASS OF 2025 Fund Balance         | 2,867.56              | .00              | (2,699.14)            | 168.42   | 2,580.14     | 2,748.56          |
| 850.000.0000.0330.203.639 CLASS OF 2026 Fund Balance         | 2,226.12              | .00              | .00                   | 2,226.12 | .00          | 2,226.12          |
| 850.000.0000.0330.203.640 CLASS OF 2027 Fund Balance         | .00                   | .00              | .00                   | .00      | .00          | .00               |
| 850.000.0000.0330.203.641 CLASS OF 2028 Fund Balance         | 683.76                | .00              | (426.00)              | 257.76   | 449.86       | 707.62            |
| 850.000.0000.0330.500.300 UNDESIGNATED DISTRICT Fund Balance | .00                   | .00              | .00                   | .00      | .00          | .00               |
| 850.000.0000.0330.500.600 Undesignated                       | (20.95)               | .41              | (5.98)                | (26.52)  | .00          | (26.52)           |

## Joseph City USD External Funds

### Student Activities Summary Report

Fiscal Year: 2024-2025

From: 6/1/2025

To: 6/30/2025

Print Detail

Page Break by Activity

Exclude Encumbrances

Reverse Signs

Subtotal By Journal

|                     | Range Beg.<br>Balance | Range<br>Revenue | Range<br>Expenditures | Balance   | Encumbrances | Available Balance |
|---------------------|-----------------------|------------------|-----------------------|-----------|--------------|-------------------|
| <b>GRAND TOTALS</b> | 53,609.69             | 890.36           | (12,148.69)           | 42,351.36 | 6,360.38     | 48,711.74         |

End of Report

**7.C. Intergovernmental Agreement with Yavapai County Education Service Agency**

E-Rate consulting services

**7.D. Gifts & Donations**

| Donor               | Item                              | School/Program   | Purpose   | Amount               |
|---------------------|-----------------------------------|------------------|---|----------------------|
| APS                 | Electric vehicle charging station | Transportation   | Transfers ownership of previously installed system to JCUSD (funded by grant) | \$46,972 (estimated) |
| Oxendale Auto Group | Donation                          | HS Softball Team | In honor of winning state championship  | \$500                |

**8. POSSIBLE EXECUTIVE SESSION (\*)**

For any agenda item indicated with an asterisk (\*), the Board may vote to convene in Executive Session pursuant to A.R.S. 38-431.03 (A) (1) for personnel matters when notified; (2) discussion or consideration of records exempt by law from public inspection; (3) for consultation with attorney; (4) for consultation with attorney when in pending or contemplated litigation. Discussion or consideration of personnel matters may include employment, assignment, appointment, promotion, demotion, dismissal, salaries, disciplining or resignation of a public officer, appointee or employee.

**9. ACTION ITEMS**

**9.A. Personnel Requests (\*)**

| Name                 | Assignment                       | Action      |
|----------------------|----------------------------------|-------------|
| Bushman, Ashlee      | Seasonal Worker                  | Appointment |
| Castellano, Kory     | Certified Tutor                  | Assignment  |
| Chairez, Sharnell    | Instructional Aide               | Appointment |
| Fischer, Rosemary    | Student Worker                   | Appointment |
| Fish, Raylee         | Student Worker                   | Appointment |
| Grant, Ashley        | Instructional Aide               | Appointment |
| Hardy, Desiree       | 7th Grade Girls Basketball Coach | Renewal     |
| Hutchens, Daniel III | Bus Driver                       | Appointment |
| Hutchens, Hailee     | Substitute Teacher               | Appointment |
| Hutchens, Jorga      | Substitute Custodian             | Appointment |
| Johnstun, Bannon     | Substitute Custodian             | Appointment |
| Miller, Ammon        | Student Worker                   | Renewal     |
| Miller, Amy          | Teacher                          | Resignation |
| Miller, Landon       | Student Worker                   | Renewal     |
| Miller, Mariah       | Student Worker                   | Renewal     |
| Miller, Sonja        | Instructional Aide               | Appointment |
| Murphy, Tyler        | Athletics & Activities Director  | Appointment |
| Powers, Maddy        | Substitute Custodian             | Appointment |
| Rael, Synali         | Student Worker                   | Renewal     |
| Randles, Chaylene    | Instructional Aide               | Resignation |
| Ramey, Jennifer      | Instructional Aide               | Appointment |
| Redfearn, Bryce      | Student Worker                   | Appointment |
| Rindlisbacher, John  | Bus Monitor; Seasonal Worker     | Resignation |
| Young, Ledra (Lake)  | Substitute Teacher               | Appointment |

**9.B. Discussion and Possible Approval of Additional Wrestling Coach Position**

**9.C. Discussion and Possible Approval of Adding Elementary Yearbook Coordinator as a New Extra Duty Position**

An **Elementary School Yearbook Coordinator** is responsible for overseeing the creation of the school's yearbook, ensuring that it reflects the spirit and memories of the students, faculty, and staff. Here are the typical job duties of an elementary school yearbook coordinator:

- Be the contact for JCES and the Yearbook Company.
- Work closely with teachers and school staff to encourage them to submit pictures of the activities that they do with their students.
- Spread the word about yearbook sales ordering flyers, posters, and other avenues. Online Ordering is a possibility.
- Organizing and uploading pictures into the design software in order to create the yearbook pages.
- Decide on the overall design and theme of the yearbook, making it age-appropriate for elementary students. Coordinate the student voting for yearbook cover and announce the winning cover.
- Use yearbook design software to create and arrange pages.
- Check each page for accuracy, ensuring that photos, captions, and student names are correct. Also checking that every student is included in the candid pictures for the yearbook.
- Review all content for spelling, grammar, and layout errors before final submission.
- Submit the yearbook design to the printing company by the deadline.
- Ensure that all students who want a yearbook have the opportunity to order one.
- Coordinate the distribution of the yearbooks to students once they arrive.
- Maintain records of students who ordered yearbooks and payment tracking.

Overall, the Elementary School Yearbook Coordinator ensures that the project is well-organized, on schedule, and that the final product is something the school community will cherish for years to come.

#### **9.D. Discussion and Possible Approval of Changes to Governing Board Policies**

These policies and possible changes were presented for public and board review at the previous regular board meeting and on the District website. See the attached Policy Advisory for policy changes to be considered. See the Link section of this agenda item to view the current policy manual. Policies affected:

##### ***Policy Advisories 876-905***

DA - Fiscal Management Goals / Priority Objectives  
DB; DB-R - Annual Budget  
DBC; DBC-R - Budget Planning, Preparation, and Schedules  
DBF - Budget Hearings and Reviews / Adoption Process  
DBI - Budget Implementation  
DBJ - Budget Transfers  
DD; DD-E - Funding Proposals, Grants, and Special Projects  
DDA - Funding Sources Outside the School System  
DEC - Funding from Federal Tax Sources  
DFA - Revenues fro Investments  
DFB - Revenues from School-Owned Real Estate  
DFD - Gate Receipts and Admissions  
DFF - Income from School Sales and Services  
DG - Banking Services  
DGA - Authorized Signatures  
DGD - Credit Cards  
DI - Fiscal Accounting and Reporting  
DIA - Accounting System  
DIB - Types of Funds / Revolving Funds  
DIC - Financial Reports and Statements  
DICA - Budget Format  
DID; DID-R - Inventories  
DIE; DIE-R - Audits / Financial Monitoring  
DJ - Purchasing  
DJE; DJE-R - Bidding / Purchasing Procedures  
DJG; DJG-R - Vendor / Contractor Relations  
DJGA/ DJGA-R - Sales Calls and Demonstrations  
DK; DK-EA; DK-EB - Payment Procedures  
DKA; DKA-E - Payroll Procedures / Schedules  
DN - School Properties Disposition

##### ***Policy Advisories 906-908***

IJNDB; IJNDB-R - Use of Technology Resources in Instruction  
JLF - Reporting Child Abuse / Child Protection  
JR; JR-R - Student Records

# POLICY SERVICES ADVISORY

Volume 37, Number 5

May 2025

Policy Advisory No. 876..... Policy DA — Fiscal Management Goals /  
Priority Objectives

Policy Advisory No. 877..... Policy DB — Annual Budget

*NEW* Regulation DB-R — Annual Budget:  
Schedule, Preparation/Planning, Format,  
and Posting/Submission

Policy Advisory No. 878 .. **DELETED** Policy DBC — Budget Planning, Preparation,  
and Schedules  
**DELETED** Regulation DBC-R — Budget Planning, Preparation,  
and Schedules

Policy Advisory No. 879..... Policy DBF — Budget Hearings and Reviews /  
Adoption Process

Policy Advisory No. 880..... **DELETED** Policy DBI — Budget Implementation

Policy Advisory No. 881..... Policy DBJ — Budget Transfers

Policy Advisory No. 882 ..... Policy DD — Funding Proposals, Grants,  
and Special Projects  
Exhibit DD-E — Funding Proposals, Grants,  
and Special Projects

Policy Advisory No. 883.....**DELETED** Policy DDA — Funding Sources Outside  
the School System

Policy Advisory No. 884 ..... **DELETED** Policy DEC — Funding from Federal  
Tax Sources

Policy Advisory No. 885 ..... Policy DFA — Revenues from Investments

Policy Advisory No. 886 .. **DELETED** Policy DFB — Revenues from School – Owned  
Real Estate

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

- Policy Advisory No. 887 .....**DELETED** Policy DFD — Gate Receipts and Admissions
- Policy Advisory No. 888 .....**DELETED** Policy DFF — Income from School Sales and Services
- Policy Advisory No. 889 ..... Policy DG — Banking Services
- Policy Advisory No. 890 ..... **DELETED** Policy DGA — Authorized Signatures
- Policy Advisory No. 891..... Policy DGD — Credit Cards
- Policy Advisory No. 892..... Policy DI — Fiscal Accounting and Reporting
- Policy Advisory No. 893 ..... **DELETED** Policy DIA — Accounting System
- Policy Advisory No. 894..... Policy DIB — Types of Funds / Revolving Funds
- Policy Advisory No. 895 ..... Policy DIC — Financial Reports and Statements
- Policy Advisory No. 896 ..... **DELETED** Policy DICA — Budget Format
- Policy Advisory No. 897..... Policy DID — Inventories  
Regulation DID-R — Inventories
- Policy Advisory No. 898..... Policy DIE — Audits / Financial Monitoring  
Regulation DIE-R — Audits / Financial Monitoring
- Policy Advisory No. 899..... Policy DJ — Purchasing
- Policy Advisory No. 900..... Policy DJE — Bidding / Purchasing Procedures  
Regulation DJE-R — Bidding / Purchasing Procedures
- Policy Advisory No. 901..... Policy DJG — Vendor / Contractor Relations  
Regulation DJG-R — Vendor / Contractor Relations
- Policy Advisory No. 902..... **DELETED** Policy DJGA — Sales Calls and Demonstrations  
**DELETED** Regulation DJGA-R — Sales Calls and Demonstrations
- Policy Advisory No. 903..... Policy DK — Payment Procedures  
Exhibit DK-EA — Payment Procedures  
**NEW** Exhibit DK-EB — Payment and Payroll Procedures

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.



**Policy Advisory No. 878**                      ***DELETED* Policy DBC — Budget Planning,  
Preparation, and Schedules  
*DELETED* Regulation DBC-R — Budget Planning,  
Preparation, and Schedules**

Language in Policy DBC was moved to Policy DB under the heading *Schedule*; therefore, Policy DBC was removed from the model manual. Regulation DBC-R was recodified as Regulation DB-R; therefore, Regulation DBC-R was removed from the model manual.

**Policy Advisory No. 879**                      **Policy DBF — Budget Hearings and  
Reviews / Adoption Process**

The first paragraph in Policy DBI was moved to Policy DBF under the heading *Implementation*; therefore, Policy DBI was removed from the model manual. Headings were also added for clarity, and the title was updated to *Budget Process, Adoption and Implementation* to align with policy content.

**Policy Advisory No. 880**                      ***DELETED* Policy DBI — Budget  
Implementation**

Language in Policy DBI was moved to Policy DBF under the heading *Implementation*; therefore, Policy DBI was removed from the model manual.

**Policy Advisory No. 881**                      **Policy DBJ — Budget Transfers**

Headings were added for clarity, and “Reconciliation and” was added to the policy title to align with content (current title – *Budget Reconciliation and Transfers*).

**Policy Advisory No. 882**                      **Policy DD — Funding Proposals, Grants,  
and Special Projects  
Exhibit DD-E — Funding Proposals, Grants,  
and Special Projects**

Language in Policies DDA and DEC were moved to Policy DD; therefore, Policies DDA and DEC were removed from the model manual. Headings were also added for clarity, and the title to the policy and accompanying exhibit was updated to *Budget Funding Sources* to align with content. A.R.S. 15-991 was added to the Legal References as it pertains to Impact Aid.

**Policy Advisory No. 883**                      ***DELETED* Policy DDA — Funding Sources  
Outside the School System**

Language in Policy DDA was moved to Policy DD under the heading *Funding Sources Outside the School System*; therefore, Policy DDA was removed from the model

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manual.

**Policy Advisory No. 884**

***DELETED* Policy DEC — Funding from  
Federal Tax Sources**

Language in Policy DEC was moved to Policy DD under the heading *Funding From Federal Tax Sources (Impact Aid Program)*; therefore, Policy DEC was removed from the model manual.

**Policy Advisory No. 885**

**Policy DFA — Revenues from Investments**

Language in Policies DFB, DFD, and DFF was moved to Policy DFA; therefore, Policies DFB, DFD, and DFF were removed from the model manual. Headings were also added for clarity, and the policy title was updated to *Revenues and Income* to align with policy content. In addition, compliancy language was expanded (e.g., permitted and prohibited fundraisers) under the heading *Student Activity Income* to assist Districts.

**Policy Advisory No. 886**

***DELETED* Policy DFB — Revenues from  
School – Owned Real Estate**

Language in Policy DFB was moved to Policy DFA under the heading *School-Owned Real Estate*; therefore, Policy DFB was removed from the model manual. Information under *Student Activities Income* was updated and *Career and Technical Education* was added to provide additional guidance. Legal References were also updated.

**Policy Advisory No. 887**

***DELETED* Policy DFD —  
Gate Receipts and Admissions**

Language in Policy DFD was moved to Policy DFA under the heading *Gate Receipts and Admissions*; therefore, Policy DFD was removed from the model manual.

**Policy Advisory No. 888**

***DELETED* Policy DFF — Income from School  
Sales and Services**

Language in Policy DFF was moved to Policy DFA under the heading *School Sales and Services*; therefore, Policy DFF was removed from the model manual.

**Policy Advisory No. 889**

**Policy DG — Banking Services**

Language in Policy DGA was moved to Policy DG; therefore, Policy DGA was removed from the model manual. Headings were also added for clarity, and the policy title was updated to *Banking Services and Authorized Signatures* to align with policy content.

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**Policy Advisory No. 890**

***DELETED* Policy DGA — Authorized Signatures**

Language in Policy DGA was moved to Policy DG under the heading *Authorized Signatures*; therefore, Policy DGA was removed from the model manual.

**Policy Advisory No. 891**

**Policy DGD — Credit Cards**

Policy DGD included a minor reorganization (the *Definition* portion of the policy was relocated to the top of the document).

**Policy Advisory No. 892**

**Policy DI — Fiscal Accounting and Reporting**

Language in Policy DIA was moved to Policy DI; therefore, Policy DIA was removed from the model manual. Headings were also added for clarity.

**Policy Advisory No. 893**

***DELETED* Policy DIA — Accounting System**

Language in Policy DIA was moved to Policy DI under the heading *Accounting System*; therefore, Policy DIA was removed from the model manual.

**Policy Advisory No. 894**

**Policy DIB — Types of Funds / Revolving Funds**

Policy DIB includes a title change only: *Revolving and Auxiliary Funds*.

**Policy Advisory No. 895**

**Policy DIC — Financial Reports and Statements**

Headings were added for clarity.

**Policy Advisory No. 896**

***DELETED* Policy DICA — Budget Format**

Language in Policy DICA was moved to Policy DB under the heading *Format* and the first paragraph under the heading *Posting and Submission*; therefore, Policy DICA was removed from the model manual.

**Policy Advisory No. 897**

**Policy DID — Inventories  
Regulation DID-R — Inventories**

The Stewardship List in Policy DID was updated to align with language in the Uniform System of Financial Records, and information regarding Equipment Inventory and Supplies inventory lists were included for additional guidance. Headings were added to Regulation DID-R, and the following sentence was moved to the first paragraph: “The copy of the complete inventory shall be on file in the office of the business manager” for clarity.

**Policy Advisory No. 898**

**Policy DIE — Audits / Financial Monitoring**

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**Regulation DIE-R — Audits / Financial  
Monitoring**

Headings were added to the Policy DIE and Regulation for DIE-R clarity. In addition, Section A was updated to \$700,000 and Section B was updated to \$750,000 to align with the USFR and Auditor General.

**Policy Advisory No. 899**

**Policy DJ — Purchasing**

To provide additional clarity, Policy DJ includes the following minor edits: headings were added, additional Legal References were provided, title was updated to *Purchasing Ethics*, subtitle was removed, and one sentence was revised under the heading *Definitions*.

**Policy Advisory No. 900**

**Policy DJE — Bidding / Purchasing  
Procedures**

**Regulation DJE-R — Bidding / Purchasing  
Procedures**

Information in Policy DJE and Regulation DJE-R was reorganized and headings were added for efficiency and clarity. In addition, “veteran-owned businesses” was added to Policy DJE to align with language in 2 C.F.R. 200.321, and *Purchases from District Employees* and *Purchases from District Board Members* were added under the heading *Purchasing* for additional guidance as provided per USFR. Regulation DJE-R includes updated A.A.C. references and additional guidance as provided per USFR.

**Policy Advisory No. 901**

**Policy DJG — Vendor / Contractor Relations  
Regulation DJG-R — Vendor / Contractor  
Relations**

Language in Policy DJGA was moved to Policy DJG; therefore, Policy DJGA was removed from the model manual. In addition, the policy and regulation titles were updated to *Vendor/Contractor and Sales Calls Requirements* to align with content. In Regulation DJG-R, a heading was added, and the first sentence was removed for clarity.

**Policy Advisory No. 902**

**~~DELETED~~ Policy DJGA — Sales Calls and  
Demonstrations  
~~DELETED~~ Regulation DJGA-R — Sales Calls and  
Demonstrations**

Language from Policy DJGA was moved to Policy DJG under the heading *Sales Calls and Demonstrations Requirements*; therefore, Policy DJGA was removed from the model manual. Regulation DJGA-R was removed from the model manual as this information is addressed in Policy DJG.

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**Policy Advisory No. 903**

**Policy DK — Payment Procedures  
Exhibit DK-EA — Payment Procedures  
NEW Exhibit DK-EB — Payment and  
Payroll Procedures**

Language in Policy DKA was moved to Policy DK; therefore, Policy DKA was removed from the model manual (minor edits were made to original language for clarity). Headings were also added, and the titles for the policy and exhibits were updated to *Payment and Payroll Procedures* to align with content. In addition, Exhibit DK-E was recodified as DK-EA, and Exhibit DKA-E was recodified as DK-EB.

**Policy Advisory No. 904**

**~~DELETED~~ Policy DKA — Payroll Procedures /  
Schedules  
~~DELETED~~ Exhibit DKA-E — Payroll Procedures /  
Schedules**

Language in Policy DKA was moved to Policy DK under the heading *Payment and Payroll Procedures*; therefore, Policy DKA was removed from the model manual. Exhibit DKA-E was recodified as DK-EB; therefore, DKA-E was removed from the model manual.

**Policy Advisory No. 905**

**Policy DN — School Properties Disposition**

Information pertaining to Competitive Sealed Bidding was removed from Policy DN as this information is provided in Policy DJE and its accompanying Regulation DJE-R.



If you have any questions, call Policy Services at (602) 254-1100. Ask for Dr. Charlotte Patterson, Policy Analyst; Lynne Bondi, Policy Analyst; or Renae Watson, Policy Technician. Our e-mail addresses are, respectively, [cpatterson@azsba.org], [lbondi@azsba.org] and [rwatson@azsba.org]. You may also fax information to (602) 254-1177.

**Note: This material is written for informational purposes only, and not as legal advice. You may wish to review the policy references and consult an attorney for further explanation.**

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

## **ADVISORY 876**

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DA ©**  
**FISCAL MANAGEMENT GOALS /**  
**~~PRIORITY OBJECTIVES~~**

The Governing Board recognizes that money and its management ~~constitute~~ the have foundational effects on of the entire school program School District operations. To make that fiscal management support as effective as possible, the Board intends to:

- A. ~~Encourage short and long range planning through the best possible budgeting procedures~~ Ensure budget development aligns with the strategic direction/plan.
- B. Explore all practical and legal sources of ~~monetary income~~ revenue.
- C. Guide and monitor the expenditure of funds to achieve ~~the greatest educational returns~~ successful student outcomes.
- D. Require maximum effectiveness, efficiency and transparency in accounting and reporting procedures.
- E. Maintain, within budget limits, a level of per-student expenditure ~~needed to~~ that provides high-quality education for the needs of all students.

Adopted: \_\_\_\_\_

# ADVISORY 877

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DB ©**  
**ANNUAL BUDGET: SCHEDULE, PREPARATION /**  
**PLANNING, FORMAT, AND**  
**POSTING / SUBMISSION**

**Schedule**

Each school year the Superintendent shall prepare and disseminate a budget preparation schedule to accomplish all required budgetary actions for the following school year. This schedule will, at a minimum, provide specific dates for the accomplishment of all state-mandated actions.

**Preparation and Planning**

The Superintendent is directed to formulate the annual budget, considering at all times that resources must be utilized to produce the most positive effect on the student's opportunity to gain an education.

The Superintendent shall be responsible for reviewing budgetary requests, providing guidelines and limitations, and presenting the proposed budgets and documentation necessary for Board study, review, and action.

The Governing Board shall be informed if the proposed budget could require an increase in the primary property tax levy of the District over the preceding year's tax levy.

If the District receives desegregation funding, a desegregation budget shall be prepared and submitted using relevant forms from the Auditor General.

**Format**

The District shall utilize the budget format prepared and prescribed by the Superintendent of Public Instruction in conjunction with the Auditor General. The budget format is designed to allow school districts to plan and provide in detail for the use of available funds.

The budget format as specified in A.R.S. 15-903 shall contain the following information. The School District shall prominently post on its website home page, separately from its budget, Items B through E below:

A. A statement identifying proposed pupil-teacher ratios and pupil-staff ratios relating to the provision of special education services for the budget year.

B. The prominent display of the average salary of all teachers employed by the School District for the current year.

C. The prominent display of the average salary of all teachers employed by the School District for the previous year.

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

D. The prominent display of the dollar increase in the average salary of all teachers employed by the School District for the current year.

E. The prominent display of the percentage increase in the average salary of all teachers employed by the School District for the current year.

The District may want to include the additional categories of Instructional Support and Student Support alongside the dollars in the classroom number as the intention of the report is to provide a more comprehensive representation of the percentage of District dollars spent that directly impacted teaching and student learning.

### **Posting and Submission**

The District shall prominently post on its website home page a copy of its profile pages that displays the percentage of every dollar spent in the classroom by that school district from the most recent status report issued by the Auditor General.

The District shall submit this annual expenditure budget to the Arizona Department of Education (ADE) and shall utilize the relevant forms and instructions from the Auditor General.

Adopted: \_\_\_\_\_

#### **LEGAL REF.:**

A.R.S.

15-271

15-302

15-481

~~15-821~~

15-824

15-903

15-905

15-905.01

15-910

15-977

15-991

~~15-2201~~

41-1279.03

#### **CROSS REF.:**

CM - School District Annual Report

DB-R - Annual Budget: Schedule, Preparation/Planning, Format and Posting/Submission

DBF - Budget Process, Adoption and Implementation

DIC - Financial Reports and Statements

DIE - Audits/Financial Monitoring

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DB-R ©**

**REGULATION**

**ANNUAL BUDGET: SCHEDULE, PREPARATION /  
PLANNING, FORMAT, AND  
POSTING / SUBMISSION**

The business manager will prepare a schedule of budget deadlines for presentation to the Superintendent each year. This schedule will cover all actions necessary to prepare the budget for the following school year.

The following items may be included in the recommended budget schedule:

- A. Specific date for receipt of unit budgets from administrators.
- B. Date for initial meeting on the budget with appropriate staff members.
- C. Date(s) for student membership and attendance reports.
- D. Date(s) for estimates on the maintenance and operations and capital budgets.
- E. Date for completion of employee compensation consideration(s).
- F. Date for preparing financial projections for all categories and subcategories to be included in the proposed budget(s) for the ensuing fiscal year.
- G. Date for determining if the proposed budget(s) is (are) in excess of the District's Truth in Taxation base limit [A.R.S. 15-905.01].
  - 1. When the base limit is exceeded, or the District plans to levy any amount for adjacent ways projects or liabilities in excess of the School District budget, a decision must be made whether to publish the truth in taxation notice separately or in combination with the proposed budget or budget summary.
  - 2. Either publication procedure requires publication of at least ten (10) days but not more than twenty (20) days prior to the truth in taxation hearing.
  - 3. The truth in taxation hearing may be held in conjunction with the proposed budget hearing.

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H. Proposed Budget: The Governing Board shall not later than July 5 and not less than ten (10) days before:

1. Publish or mail to each household in the District a copy of the proposed budget or a summary of the proposed budget for consideration of the residents or taxpayers of the District, and a notice of the public hearing and Board meeting.
2. Furnish to the Superintendent of Public Instruction and County School Superintendent, in electronic format, the proposed budget and summary of proposed budget for the budget year.
3. Submit to the Department of Education the proposed budget which shall prominently display this information about the School District on the website maintained by the Department. If the School District maintains a website, the School District shall post a link to the website of the Department of Education where this information about the School District is posted.

I. Budget Adoption: The Governing Board shall not later than July 15 and not less than ten (10) days after posting or mailing the notice of the public hearing and Board meeting:

1. Conduct the public hearing and present the proposed budget to the persons attending the hearing, and

If a truth in taxation hearing is required it must be conducted prior to the budget hearing.

2. Immediately following the public hearing, the President shall call the Governing Board meeting to order for the purpose of adopting the budget.

J. Adopted Budget: Not later than July 18:

1. The adopted budget shall be submitted electronically to the Superintendent of Public Instruction.
2. The adopted budget shall be submitted to the Department of Education. The Department shall prominently display this information about the School District on the website maintained by the Department. If the School District maintains a website, the School District shall post a link to the website of the Department of Education where this information about the School District is posted.

K. Publishing: The Governing Board must do one of the following and provide notice of the public hearing and Board meeting to adopt the budget no later than ten (10) days prior to the meeting to adopt the budget:

1. Posting to ADE's Website: Districts that have a website are required to follow the website requirements above and may choose to meet the publication requirement for the proposed budget by electronically uploading the Hearing Notification and Summary via the School Finance Budget System to ADE for posting on ADE's website. If the budget or proposed budget and notice are posted on a website maintained by the department of education or mailed, the Board shall file an affidavit with the Superintendent of Public Instruction within thirty (30) days after the mailing or the date that the information is posted on the website.

2. Publishing in a newspaper: Print the proposed budget or Summary and Hearing Notification in at least eight (8)-point type in a newspaper of general circulation within the District. The publisher's affidavit of newspaper publication must be filed with the Superintendent of Public Instruction within thirty (30) days of the publication. To meet this requirement, districts should scan and e-mail the affidavit to [SFBudgetTeam@azed.gov](mailto:SFBudgetTeam@azed.gov).

3. Mailing: Mail the proposed budget or Summary and Hearing Notification to each household in the District. An affidavit or other documentation of mailing must be filed with the Superintendent of Public Instruction within thirty (30) days of mailing. To meet this requirement, districts should scan and email the affidavit to [SFBudgetTeam@azed.gov](mailto:SFBudgetTeam@azed.gov).

L. Override Election:

1. When applicable, dates pursuant to A.R.S. §§ [15-481-15-482](#), as applicable.

2. Date for budget hearing on following year's budget.

a. At least ninety (90) days before a proposed override election (first [1st] Tuesday following the first [1st] Monday in November, order override election to present proposed override budget to electors. Must also prepare alternate budget without override increase in event voters reject the proposed override budget.

b. At least thirty-five (35) days before override election, mail or distribute to households where qualified electors reside the informational report prepared by County School Superintendent.

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

c. When a determination is made to cancel the override election, the request must be made to the County School Superintendent at least eighty (80) days before the override election date.

*M. Annual Financial Report:*

1. Not later than October 15 of each year the Governing Board shall:

a. Prepare and distribute the annual financial report for the prior fiscal year.

b. Provide a copy of the financial report to the County School Superintendent.

c. Electronically submit a copy of the financial report to the State Superintendent of Public Instruction.

d. Submit a copy of the annual financial report for the prior fiscal year to the Department of Education. The Department shall prominently display this information about the School District on the website maintained by the Department. If the School District maintains a website, the School District shall post a link to the website of the Department of Education where this information about the School District is posted.

2. Not later than November 15 of each year the Governing Board shall publish the annual financial report:

a. In a newspaper of general circulation within the School District, or

b. In the official newspaper of the county as defined in A.R.S. 11-255, or

c. By mailing a copy to each household in the District, or

d. By electronic transmission of the information to the Department of Education for posting on the Department's website (if the Board chooses this option the School District shall post a link on the District's website to the report on the Department's website).

All forms and technical requirements for each respective form shall be as prescribed in A.R.S. 15-904.

## ADVISORY 878

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

~~DBC ©  
BUDGET PLANNING, PREPARATION,  
AND SCHEDULES~~

*Remove per PA 878 - May 2025* (Merged with Policy DB.)

~~DBC-R~~ ©

~~REGULATION~~

~~BUDGET PLANNING, PREPARATION,  
AND SCHEDULES~~

*Remove per PA 878 - May 2025* (Merged with New Regulation DB-R.)

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

## **ADVISORY 879**

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DBF ©**  
**BUDGET HEARINGS AND REVIEWS /**  
**~~ADOPTION~~ PROCESS, ADOPTION AND IMPLEMENTATION**

**Process**

~~At least~~ Within ten (10) days before and not later than July 5, the Governing Board shall publish notice of the public hearing and Board meeting to be held no later than July 15 to present the proposed budget for consideration of the residents or taxpayers of the District and shall submit the proposed budget to the Department of Education.

The Department shall prominently display the budget information on the website maintained by the Department. If the District maintains a website, the District shall post a link to the website of the Department of Education where this information about the District is posted.

If a truth-in-taxation notice and hearing is required under A.R.S. 15-905.01, the Board may combine the budget notice and hearing with the truth-in-taxation notice and hearing.

The publishing of the proposed budget and notice of the hearing and meeting shall be in accordance with A.R.S. 15-905. If a truth-in-taxation notice and hearing is necessary, the notice shall be in accordance with A.R.S. 15-905.01. If the Board determines to combine the budget and truth-in-taxation hearings, publication of a combined notice must satisfy the requirements of both A.R.S. 15-905 and 15-905.01.

**Adoption**

Immediately following the public hearing, the President shall call to order the Board meeting for the purpose of adopting the budget. A Board member may, without creating a conflict of interest, participate in adoption of a final budget even though the member may have substantial interest in specific items included in the budget.

The Board shall adopt the budget and enter the budget as adopted in its minutes.

Not later than July 18, the Governing Board shall submit the adopted budget to the Department of Education. The Department shall prominently display the District budget information on the website maintained by the Department. If the District maintains a website, the District shall post a link to the website of the Department of Education where this information about the District is posted.

Filing of the budget shall be according to state law. [See Regulation ~~DBC~~-R]

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

If the Governing Board receives notification that one (1) or more of the District's categorical budgets are in excess of its authorized limit, the Board shall revise the affected budget(s) in accordance with A.R.S. 15-905.

**Implementation**

To determine if budgeted expenditures are in keeping with the adopted budget, a monthly report of expenditures and revenues shall be presented to the Board. Variances within budget categories shall be a part of this report.

Adopted: \_\_\_\_\_

LEGAL REF.:

A.R.S.

15-903

15-905

15-905.01

15-911

15-915

CROSS REF.:

DBC - Annual Budget: Planning, Schedule, Preparation/Planning, Format and Schedules Posting/Submission

# ADVISORY 880

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DBI ©  
BUDGET IMPLEMENTATION**

*Remove per PA 880 - May 2025* (Merged with Policy DBF.)

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

# ADVISORY 881

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DBJ ©**  
**BUDGET TRANSFERS RECONCILIATION**  
**AND TRANSFERS**

**Reconciliation**

Periodically throughout the year, the budget will be reconciled to the actual expenditures of the District.

**Transfers**

The Governing Board may authorize the expenditure of monies budgeted within the maintenance and operation section of the budget for any subsection within the section in excess of amounts specified in the adopted budget only by action taken at a public meeting of the Governing Board and if the expenditures for all subsections of the section do not exceed the amount budgeted.

Adopted: \_\_\_\_\_

LEGAL REF.:  
A.R.S.  
15-905

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

## ADVISORY 882

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DD ©**  
**BUDGET FUNDING PROPOSALS, GRANTS, SOURCES**  
**AND SPECIAL PROJECTS**

The Governing Board is to be kept informed of possible sources of state, federal, and other funds for the support of the schools and/or for the enhancement of educational opportunities. The Superintendent is to apprise the Board of its eligibility for general or program funds and to make recommendations for Board action.

**Funding Sources Outside  
the School System**

The District may submit proposals to private foundations and other sources of financial aid for subsidizing such activities as innovative projects, feasibility studies, long-range planning, research and development, or other educational needs.

Timelines permitting, grant proposals are to be approved by the Board before being submitted to the funding agency. The Superintendent shall establish administrative guidelines for the processing of proposal ideas to the Board for its approval.

The Governing Board may receive, hold, and dispose of any gift, grant, or bequest of property or equipment in accordance with state law and the intent of the instrument conferring title.

The Governing Board may also accept gifts, grants, or devises of money. The disposition of unused funds from these sources shall be in accordance with law.

**Funding From Federal Tax Sources  
(Impact Aid Program)**

Regardless of any other law, if the District receives assistance pursuant to Title VIII of the Elementary and Secondary Education of 1965, as amended (Impact Aid Program), the District shall establish a local level fund designated as the Impact Aid Fund and deposit the Impact Aid monies received in the Fund.

The District shall separately account for monies in the Fund and shall not combine monies in the Fund with any other source of local, state, and federal assistance. Monies in the Fund shall be expended pursuant to federal law only for the purposes allowed by Title VIII and A.R.S. 15-905. The District shall account for monies in the Fund according to the Uniform System of Financial Records (USFR) as prescribed by the Auditor General.

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

If the District has established an Impact Aid Fund, the Superintendent of Public Instruction shall separately account for monies in the District's Impact Aid Fund in the annual report required by A.R.S. 15-255.

Monies in the Fund are considered federal monies and are not subject to legislative appropriation.

Adopted: \_\_\_\_\_

LEGAL REF.:

A.R.S.

15-206

15-207

15-208

15-209

15-210

15-341

15-905

15-991

20 U.S.C. 7701, Title VIII - Impact Aid Program

CROSS REF.:

KCD - Public Gifts/Donations to Schools

IHBJ - Indian Education

KJGA - Relations with Parents of Children Educated Pursuant to  
Federal Impact Aid Programs

DD-E ©

EXHIBIT

BUDGET FUNDING PROPOSALS, GRANTS, SOURCES  
AND SPECIAL PROJECTS

RESOLUTION

WHEREAS, participation in programs funded in whole or in part by federal funds requires that a participating district demonstrate that the district meets the requirement of comparability between schools that receive federal funding and those that do not receive such funding, and that the district provide for equivalency of access to district staffing, equipment, and materials by all district schools, based on student per-capita allocations and individual schools' needs analyses, and, in addition, that all schools and programs have equivalent access to district support operations including but not limited to maintenance, transportation, and warehousing operations support; and

WHEREAS, budgets for staffing, textbooks, equipment, supplies, and services for district schools will be provided for at all schools without supplanting special funding provided from any source with nonsupplanting requirements; and

WHEREAS, expenditures budgets for schools participating in Title I programs will be provided for on the same per-capita basis as budgets for schools not participating in the program; and

WHEREAS, the \_\_\_\_\_ School District No. \_\_\_\_\_ intends to participate in such programs and receive federal funds;

NOW, THEREFORE, BE IT RESOLVED that the Governing Board of the \_\_\_\_\_ School District No. \_\_\_\_\_ hereby directs the Superintendent to ensure that said district does in fact comply with such mandates for comparability and equivalency of access for the period of any grant under which such funds are received.

This resolution was moved, seconded, and passed at a meeting of the \_\_\_\_\_ Governing Board on \_\_\_\_\_, 20\_\_\_\_.

ATTEST:

\_\_\_\_\_  
President

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

# ADVISORY 883

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DDA ©  
FUNDING SOURCES OUTSIDE  
THE SCHOOL SYSTEM**

*Remove per PA 883 - May 2025* (Merged with Policy DD.)

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

# ADVISORY 884

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DEC ©  
FUNDING FROM FEDERAL  
TAX SOURCES**

**(Impact Aid Program)**

*Remove per PA 884 - May 2025* (Merged with Policy DD.)

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

# ADVISORY 885

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DFA ©**  
**REVENUES FROM INVESTMENTS AND INCOME**

**Investments**

The Board will annually consider and vote on a request to the County Treasurer to authorize investments for the following fiscal year. The Superintendent shall ensure that this question is placed on an agenda for a Board meeting in June of each year.

**School-Owned Real Estate**

Revenues collected from rental or lease of school-owned real estate shall be deposited in the Civic Center fund. Excess rental/lease revenues may be used pursuant to A.R.S. 15-342(29). Monies from the sale of school-owned real estate shall be deposited as provided under state statutes.

**Gate Receipts and Admissions**

Admission receipts from school events shall be adequately controlled. The Superintendent is responsible for the proper collection, supervision, disbursement, and/or remittance of these monies.

Admission to school events for which an admission is charged ordinarily will be by purchased ticket or special pass only. Adequate records will be maintained for accounting purposes.

**School Sales and Services**

***Student Activity Income***

Procedures shall be developed by the Superintendent to ensure compliance of all student activity funds pursuant to A.R.S. 15-1121-1124.

Student activity fund-raisers may not include: raffles; Bingo games; purchasing of classroom items.

Student activity fund-raisers may include: silent auctions; donations to other entities (i.e., Red Cross), with administrative approval.

The principal of each campus shall monitor the financial activities of the student body to ensure that fund-raising complies with District guidelines and is in accordance with the provisions of A.R.S. Title 15.

To comply with District fund-raising guidelines and A.R.S. Title 15, the principal shall monitor all student activity finances.

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**Advertising Income**

A District advertisement fund shall be established for the deposit of revenues if the District sells advertising.

All revenues collected will be deposited in the Advertisement Fund and accounted for in accordance with the Uniform System of Financial Records. Monies in the Advertising Fund are not subject to reversion.

**Career and Technical Education  
(Vocational Education)**

The governing board of a school district may establish a permanent career and technical education projects fund in an amount of not more than one hundred thousand dollars (\$100,000). The fund consists of proceeds from the sale of items produced or services provided by career and technical education programs. Monies in the fund may be used for any purposes noted in 15-1231.

Adopted: \_\_\_\_\_

LEGAL REF.:

A.R.S.

15-342

15-996

15-1024

15-1025

15-1102

15-1105

15-1121 through 1124

15-1231

A.G.O.

I80-099

I82-090

I84-018

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

## **ADVISORY 886**

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DFB ©  
REVENUES FROM SCHOOL - OWNED  
REAL ESTATE**

*Remove per PA 886 - May 2025* (Merged with Policy DFA.)

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

# ADVISORY 887

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DFD ©  
GATE RECEIPTS AND ADMISSIONS**

*Remove per PA 887 - May 2025* (Merged with Policy DFA.)

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

# ADVISORY 888

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DFE ©  
INCOME FROM SCHOOL  
SALES AND SERVICES**

*Remove per PA 888 - May 2025* (Merged with Policy DFE.)

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

# ADVISORY 889

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DG ©**  
**BANKING SERVICES AND**  
**AUTHORIZED SIGNATURES**

**Banking Services**

The Board, by majority vote, shall designate one (1) or more banks as depository for the safeguarding of school auxiliary and revolving funds.

Each designated depository shall furnish proper security for such deposits in the amount designated by the Board and in accordance with law.

Each designated depository shall be advised not to cash checks payable to the District but to deposit checks only to the District auxiliary accounts.

**Authorized Signatures**

Authorized signatories for all checking accounts shall be approved by the Board.

On accounts required by statute to have two (2) signatures, the signatories shall be as specified by the statutes.

Adopted: \_\_\_\_\_

LEGAL REF.:

A.R.S.

15-321

15-341

15-1122

15-1126

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

# ADVISORY 890

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DGA ©  
AUTHORIZED SIGNATURES**

*Remove per PA 890 - May 2025* (Merged with Policy DG.)

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

# ADVISORY 891

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DGD ©  
CREDIT CARDS**

**(Credit Cards and/or Procurement Cards)**

**Definition of Credit/  
Procurement Card**

The District defines "credit card" and "procurement card" as a form of payment in lieu of cash, purchase order, or check. The credit/procurement card must bear the company logo.

**Use of Credit Cards/  
Procurement Cards**

The Governing Board acknowledges that instances may occur when ready payment for goods or services is in the District's best interest. The Superintendent is responsible for the implementation of all aspects of the District credit/procurement card program. The Board authorizes the Superintendent to secure and assign controlled-limit credit/procurement cards to designated personnel. District-assigned credit/procurement cards may not be used for personal expenditures.

The use of credit/procurement cards is to be closely monitored and payment of statements for authorized purchases ~~are~~ is to be made as promptly as possible to avoid fees and charges for the use of such cards.

The Superintendent is directed to develop regulations for the use of District-assigned credit/procurement cards. Such regulations are subject to Board review and approval.

The Board reserves the right to revise or rescind this policy at its sole discretion.

**~~Definition of Credit/  
Procurement Card~~**

~~The District defines "credit card" and "procurement card" as a form of payment in lieu of cash, purchase order, or check. The credit/procurement card must bear the company logo.~~

Adopted: \_\_\_\_\_

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

LEGAL REF.:

A.R.S.

15-342

38-621

38-622

38-623

38-624

38-625

Uniform System of Financial Records

CROSS REF.:

DKC - Expense Authorization/Reimbursement

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

# ADVISORY 892

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DI ©  
FISCAL ACCOUNTING AND REPORTING**

The Superintendent shall be ultimately responsible for receiving and properly accounting for all funds of the District.

**Uniform System of Financial Records (USFR)**

The Uniform System of Financial Records developed by the State Department of Education and the Auditor General's Office shall be used to provide for the appropriate separation of accounts and funds.

**Reporting**

The Superintendent shall provide to the Board periodic financial reports showing the financial condition of the District.

The Superintendent shall also be responsible for student accounting and shall report enrollment and attendance as required by the state.

**Accounting System**

Records of all phases of the business operation shall be kept in strict accordance with the Uniform System of Financial Records, other applicable laws, and the policies of the Board.

The District may apply to the State Board of Education (SBE) to assume accounting responsibility, in which case the District shall develop and file an accounting responsibility plan with the Arizona Department of Education (ADE) and the county school superintendent of the county in which the school district is located as specified in A.R.S. 15-914.01.

Before January 1 of the fiscal year preceding the fiscal year of implementation and before applying to assume accounting responsibility the District must apply for evaluation by the Auditor General and by the County Treasurer of the county in which the school district is located, as specified in A.R.S. 15-914.01.

If the SBE approves for the District to assume accounting responsibility, the District must contract with an independent certified public accountant for an annual financial and compliance audit.

Adopted: \_\_\_\_\_

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

LEGAL REF.:

A.R.S.

15-239

15-271

15-272

15-901

15-914.01

Uniform System of Financial Records

CROSS REF.:

DIC - Financial Reports and Statements

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

## ADVISORY 893

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DIA ©  
ACCOUNTING SYSTEM**

***Remove per PA 893 - May 2025*** (Merged with Policy DI.)

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

# ADVISORY 894

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DIB ©**  
**~~TYPES OF FUNDS / REVOLVING~~ AND AUXILIARY FUNDS**

**General Purpose Revolving Fund**

A general purpose revolving fund shall be established, pursuant to A.R.S. 15-1101, at a local bank in the account name of the \_\_\_\_\_ School District No. \_\_\_\_\_. Drafts drawn on the account shall be signed by the employee in charge of the fund or other designated person. The fund shall be managed in the manner prescribed by the Uniform System of Financial Records (USFR).

No revolving fund may be established unless the designated employee in charge is bonded for an amount equal to twice the amount of the fund. The cost of the bond shall be a proper charge against the District.

**Auxiliary Operations Fund**

The auxiliary operations fund shall consist of monies raised with the approval of the Board in pursuance of and in connection with all activities of school bookstores and athletic activities.

Fund monies shall be accounted for in accordance with the requirements of the USFR.

After authorization by the Board, fund monies shall be deposited in a bank account designated as the auxiliary operations fund. Disbursements from the fund shall be authorized by the Board.

Disbursements shall be made by check signed by two (2) employees of the District designated by the Board. Persons authorized by the Board to sign checks shall be bonded, and the cost shall be charged against the fund.

Auxiliary operations fund monies may be invested and reinvested by the Board. All monies earned by investment shall be credited to the auxiliary operations fund.

Adopted: \_\_\_\_\_

**LEGAL REF.:**

- A.R.S.
- 15-1101
- 15-1124
- 15-1125
- 15-1126
- 15-1154

**CROSS REF.:**

JJF - Student Activities Funds

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

# ADVISORY 895

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DIC ©  
FINANCIAL REPORTS  
AND STATEMENTS**

**Financial Reports**

Prior to October 15 of each year, the Superintendent shall present to the Board the annual financial report for the previous fiscal year and the Governing Board shall submit the annual financial report for the previous fiscal year to the Department of Education, which shall prominently display this information about the District on the website maintained by the Department.

The District annual financial report shall be published by November 15 either in a newspaper of general circulation within the District, by electronic submission to the Department of Education for publication on its website, in the official newspaper of the county, or by mailing to each household in the School District. If published electronically as indicated above, a link shall be posted on the School District web site to the state department's website.

**Financial Statements**

The Superintendent shall also ensure that a report of expenditures of public funds and student activity funds is provided to the Board on a monthly basis.

Adopted: \_\_\_\_\_

**LEGAL REF.:**

A.R.S.

15-271

15-302

15-904

15-977

15-991

**CROSS REF.:**

CM - School District Annual Report

DBC-R - Annual Budget: Schedule, Preparation/Planning, Preparation  
Format, and Schedules Posting/Submission

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

# ADVISORY 896

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DICA ©  
BUDGET FORMAT**

*Remove per PA 896 - May 2025* (Merged with Policy DB.)

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

# ADVISORY 897

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DID ©  
INVENTORIES**

The Superintendent shall establish a program to implement District inventory procedures, which shall include inventory of land, buildings, and equipment as required in the Uniform System of Financial Records (USFR).

The acquisition threshold for capitalizing items and entering them on the ~~general fixed Capital aAssets Listing~~ shall be five thousand dollars (\$5,000) or greater. Items having an acquisition cost greater than one thousand dollars (\$1,000) but less than ~~five thousand dollars (\$5,000)~~ the District's adopted capitalization threshold shall be placed on the ~~sStewardship Listing~~. ~~General fixed Capital~~ assets and stewardship items shall be inventoried as specified by the USFR. The District shall also maintain Equipment Inventory and Supplies inventory lists as specified by the USFR.

Adopted: \_\_\_\_\_

LEGAL REF.:

Uniform System of Financial Records

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DID-R ©**

**REGULATION**

**INVENTORIES**

The business manager has responsibility to assist the Superintendent in developing procedures for maintaining District inventories. The District will follow the prescribed minimum internal control policies and procedures provided by the Uniform System of Financial Records to meet compliance requirements for inventories. A copy of the complete inventory shall be on file in the office of the business manager.

**Capital Assets**

A detailed listing of capital assets such as land, buildings, machinery and equipment, vehicles, infrastructure, and easements must be established as prescribed by the Governmental Accounting Standards Board (GASB). Assets, including lands and buildings, and improvements to land and/or existing buildings, having a total acquisition cost of five thousand dollars (\$5,000) or more will be tagged, marked, capitalized and included in the general fixed-assets inventory. To comply with the requirements of GASB Statement number 34, accurate, complete, and up-to-date documentation including, but not limited to, the following shall be maintained:

A. An inventory record registering for each item the:

1. description;
2. year of acquisition;
3. method of acquisition;
4. funding source;
5. cost or estimated cost;
6. salvage value;
7. estimated useful life;
8. function(s) for which the asset is used.

B. A depreciation schedule that:

1. includes all exhaustible capital assets, by type, with examples;
2. excludes non-exhaustible capital assets and construction in process;

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

3. is based on locally-determined estimated useful life, typically in years;
4. projects residual value at the end of useful life;
5. identifies the method used for calculating depreciation;
6. identifies the selected averaging condition, where applicable.

C. A disposal listing of items removed from the inventory, including at minimum the date and method of disposal.

### **Stewardship Inventory**

A stewardship inventory shall also be maintained for all equipment, including vehicles, with a cost of one thousand dollars (\$1,000) or more but less than the capital asset threshold. The inventory must identify each item's description, identification (tag) number, location, and the month and year of acquisition.

### **Other Inventory (less than \$1000)**

For insurance and other purposes, an inventory of items with an acquisition cost of less than one thousand dollars (\$1,000) may be maintained.

### **Physical Inventory**

The District shall conduct a physical inventory of listed equipment:

- A. at least every two (2) years for items:
  1. purchased with federal funds;
  2. with an acquisition cost of five thousand dollars (\$5,000) or more.
- B. at least every three (3) years:
  1. for all capital equipment;
  2. for items on the stewardship list, where such list exists.

Facility administrators shall implement the procedures, maintain lists, and provide reports as requested on the contents of their buildings.

Each administrative unit shall assist in completing an annual inventory of all capital furniture and equipment, library media, and textbooks at its location.

Facility administrators shall require any employee who desires to remove an item from one school or department for use in another to submit a written transfer request form to the business manager. Written approval must be obtained from the business manager prior to the relocation of an item.

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**Supply Records**

Supply records shall be kept, which will show:

- A. The name of the individual receiving the supplies.
- B. The date received.
- C. The disposition of the supplies.

A perpetual inventory shall be maintained for all supplies warehoused by the District.

# ADVISORY 898

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DIE ©  
AUDITS / FINANCIAL MONITORING**

The Governing Board directs the Superintendent to implement procedures that assure District compliance with all state and federal requirements for audits and financial monitoring ~~and audits~~. Contingent upon prescribed qualifying criteria, such requirements may include, but are not limited to, procedural reviews by the Office of the Auditor General and the federal Single Audit Act Amendments and Office of Management and Budget (OMB) Compliance Supplement June 2016.

**Necessary Services**

The procurement of the necessary services shall be consistent with the District's policy on bidding and purchasing procedures. Any allocation of costs for the services shall conform to the requirements of the Uniform System of Financial Records (USFR).

**Board Presentation**

A final report of each separate fiscal management review shall be presented to the Board for examination and discussion. After a report has been presented to the Board, it will become a matter of public record, and its distribution will not be limited. Copies of a final report shall be filed with appropriate state and other authorities.

The Governing Board shall publicly accept all audits and compliance questionnaires by roll call vote.

**Posting**

The District shall prominently post on its website home page a copy of its profile pages that displays the percentage of every dollar spent in the classroom by that school district from the most recent status report issued by the Auditor General.

Adopted: \_\_\_\_\_

LEGAL REF.:

A.R.S.

15-213

15-239

15-914

15-2111

41-1279.03

41-1279.04

41-1279.05

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

41-1279.07

41-1279.21

41-1279.22

A.A.C.

R7-2-902

USFR - Audit Requirements

2 CFR Part 200 Appendix XI, Compliance Supplement

CROSS REF.:

DB - Annual Budget: Schedule, Preparation/Planning, Format,  
and Posting/Submission

~~DICA - Budget Format~~

**DIE-R ©**

REGULATION

**AUDITS / FINANCIAL MONITORING**

Each program, instructional unit, and department shall prepare and maintain such financial records as are directed by the Superintendent. The documents shall be accurate and of essential sufficiency to enable the District to comply with all requirements for financial monitoring and audits, both internal and external.

**Requirements for Proper Management**

In addition to special reviews that may be conducted as necessary, the District will comply with the following minimum requirements to demonstrate proper management of and accountability for its fiscal resources:

A. Whenever the District's expenditure of federal financial assistance is less than ~~five~~ seven hundred thousand dollars (~~\$5700,000~~) during a fiscal year, the District shall be subject to a procedural review conducted by the Office of the Auditor General at times determined by the Auditor General, subject to the following provisions:

1. Districts that have adopted a Maintenance and Operations Fund (M&O) budget of two million dollars (\$2,000,000) or more shall contract with an independent certified public accountant to conduct an annual financial statement audit in accordance with generally accepted governmental auditing standards.
2. Districts that have adopted a Maintenance and Operations Fund (M&O) budget between seven hundred thousand dollars (\$700,000) and two million dollars (\$2,000,000) shall contract with an independent certified public accountant to conduct a biennial financial statement audit in accordance with generally accepted governmental auditing standards.

B. Whenever the District's combined expenditure from all sources of federal financial assistance is ~~five~~ seven hundred and fifty thousand dollars (~~\$5750,000~~) or more during a fiscal year, the District shall contract with an approved independent auditor to conduct an annual financial audit. The audit shall be performed in accordance with generally accepted auditing standards in compliance with the requirements of the federal Single Audit Act Amendments of 2003 and any implementing regulations of the Office of Management and Budget (OMB).

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

To the extent permitted by federal law, the District:

A. may convert to a biennial audit schedule when the previous annual audit contained no significant negative findings, defined as the District having received a letter of noncompliance issued by the auditor general;

B. shall convert back to an annual audit whenever an audit produces significant negative findings;

C. may convert back to a biennial audit schedule when the two (2) previous audits have not contained any significant negative findings.

The Superintendent shall be promptly informed of any material deficiency that is discovered during a monitoring or auditing process.

# ADVISORY 899

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DJ ©**  
**PURCHASING ETHICS**  
**(~~Purchasing Ethics Policy~~)**

**Governing Board**

The District's Governing Board members and employees shall not use their offices or positions to receive any valuable things or benefits that would not ordinarily accrue to them in the performance of duties if the things or benefits are of such value or character as to manifest a substantial and improper influence upon the performance of their duties.

The Governing Board may provide food and beverages at School District events, including official school functions and trainings, as allowed by the Arizona Constitution, laws pertaining to travel and subsistence, gifts, grants (including federal grants) or devises, and policies of the Department of Education.

**Personal Gift or Benefit**

A person who supervises or participates in contracts, purchases, payments, claims or other financial transactions, or a person who supervises or participates in the planning, recommending, selecting or contracting for materials, services, goods, construction, or construction services of a school district or school purchasing cooperative is guilty of a Class 6 felony if the person solicits, accepts or agrees to accept any personal gift or benefit with a value of three hundred dollars (\$300) or more from a person or vendor that has secured or has taken steps to secure a contract, purchase, payment, claim or financial transaction with the school district or school purchasing cooperative. Soliciting, accepting or agreeing to accept any personal gift or benefit with a value of less than three hundred dollars (\$300) is a Class 1 misdemeanor.

Any person or vendor that has secured or has taken steps to secure a contract, purchase, payment, claim or financial transaction with a school district or school purchasing cooperative that offers, confers or agrees to confer any personal gift or benefit with a value of three hundred dollars (\$300) or more on a person who supervises or participates in contracts, purchases, payments, claims or other financial transactions, or on a person who supervises or participates in planning, recommending, selecting or contracting for materials, services, goods, construction or construction services of a school district or school purchasing cooperative, is guilty of a Class 6 felony. Offering, conferring or agreeing to confer any personal gift or benefit with a value of less than three hundred dollars (\$300) is a Class 1 misdemeanor.

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| <p><i>Note:</i> This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.</p> |
|---|

## **Definitions**

For the purpose of this policy, a *gift or benefit* means a payment, distribution, expenditure, advance, deposit or donation of monies, any intangible personal property, or any kind of tangible personal or real property. A gift or benefit does not include an item of nominal value such as a greeting card, t-shirt, mug or pen. A *gift or benefit* does not include food or beverage, or expenses or sponsorships related to a special event or function related to which individuals ~~identified in this policy, nor does this include an item of nominal value such as a greeting card, T-shirt, mug or pen.~~ involved in procurement and purchasing are invited.

## **Reprisals**

A District employee who has control over personnel actions may not take reprisal against a District employee or that employee's disclosure of information that is a matter of public concern, including a violation of District policy or laws/regulations governing the District.

Adopted: <-- z2AdoptionDate -->

### LEGAL REF.:

A.R.S.

15-213

15-323

15-341

15-342

38-501 - 38-511

38-503

38-504

A.A.C.

R7-2-1001 - R7-2-1003

R7-2-1308

Article IX, section 7, Constitution of Arizona (~~laws pertaining to travel and subsistence, gifts, grants, including federal grants, or devises~~)

Policies adopted by the Department of Education

### CROSS REF.:

DJE - Bidding/Purchasing Procedures

GBEAA - Staff Conflict of Interest

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

# ADVISORY 900

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DJE ©  
BIDDING / PURCHASING PROCEDURES**

The Superintendent shall be responsible for all purchasing, contracting, competitive bidding, and receiving and processing of all bid protests, in accordance with the Arizona school district procurement rules, including A.A.C. R7-2-1141 *et seq.* A contract shall not be awarded to an entity that does not verify employment eligibility of each employee through the E-verify program in compliance with A.R.S. 23-214 subsection A. Each contract shall contain the warranties required by A.R.S. 41-4401 relative to the E-verify requirements. District purchases shall also be in accordance with 2 C.F.R. 200.214 (Code of Federal Regulations Title 2).

The Superintendent shall ensure that all aspects of bidding and purchasing procedures conform to federal and state laws, rules and regulations, including A.R.S. 38-503(C). The Superintendent shall establish ~~Administrative regulations shall be established to~~ ensure the District is in full compliance, including contracting with small and minority businesses, women's business enterprises, veteran-owned businesses, and labor surplus area firms. (2 C.F.R. 200.321).

**~~Purchases Not Requiring Bidding~~**

~~Purchases of less than ten thousand dollars (\$10,000) may be made at the discretion of the Superintendent. Such procurements are not subject to competitive purchasing requirements, however reasonable judgment should be used to ensure the purchases are advantageous to the District.~~

~~Written price quotations will be requested from at least three (3) vendors for transactions of at least ten thousand dollars (\$10,000) and less than one hundred thousand dollars (\$100,000). If three (3) written price quotations cannot be obtained, documentation showing the vendors contacted that did not offer written price quotations, or explaining why written price quotations were not obtained, shall be maintained on file in the District office.~~

The District is not required to engage in competitive bidding in order to place a student in a private school that provides special education services if such placement is prescribed in the student's individualized education program and the private school has been approved by the Department of Education Division of Special Education pursuant to A.R.S. 15-765. The placement is not subject to rules adopted by the State Board of Education before November 24, 2009 pursuant to A.R.S. 15-213.

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

The District may, without competitive bidding, purchase or contract for any products, materials and services directly from Arizona Industries for the Blind, certified nonprofit agencies that serve individuals with disabilities and Arizona Correctional Industries if the delivery and quality of the goods, materials or services meet the District's reasonable requirements.

Intergovernmental agreements and contracts between school districts or between the District and other governing bodies as provided in A.R.S. 11-952 are exempt from competitive bidding under the procurement rules adopted by the State Board of Education pursuant to A.R.S. 15-213.

The District is not required to engage in competitive bidding to make a decision to participate in insurance programs authorized by A.R.S. 15-382.

The District is not required to obtain bid security for the construction-manager-at-risk method of project delivery.

### ***Online Bidding***

Until such time as the State Board of Education adopts rules for the procurement of goods and information services by school districts and charter schools using electronic, online bidding, the District may procure goods and information services pursuant to A.R.S. 41-2671 through 2673 using the rules adopted by the Department of Administration in implementing 41-2671 through 2673.

Except as otherwise provided below, only purchases of ten thousand dollars (\$10,000) or more are subject to competitive bidding requirements.

### **Purchasing**

#### ***Purchases from District Employees***

Districts are required to follow the School District Procurement Rules for all purchases of goods or services from District employees regardless of dollar amount. A.R.S. 38-503(C) prohibits public employees from providing their employers with any equipment, material, supplies, or services unless provided under an award or contract let after public competitive bidding. Districts must follow the School District Procurement Rules, regardless of the expenditure amount, when purchasing goods or services from District employees. This applies to any purchase using District monies, including extracurricular activities fees tax credit contributions and monies held in trust by the District, such as student activities monies. Although the School District Procurement Rules exempt expenditures of student activities monies from the Rules, that exemption does not apply to purchases in which a District employee acts as a vendor.

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

### **Purchases from District Board Members**

Districts are required to follow the School District Procurement Rules for all purchases of services from District Board members regardless of dollar amount. A.R.S. 38-503(C) prohibits governing board members from providing their district with any services, unless provided under an award or contract let after public competitive bidding. However, for purchases of supplies, materials, and equipment from district board members, districts are required to follow the School District Procurement Rules only if the purchase exceeds one hundred thousand dollars (\$100,000). Purchases below the one hundred thousand dollar (\$100,000) threshold must comply with the guidelines for written quotes. For districts with three thousand (3,000) or more students, statutes limit purchases of supplies, materials, and equipment from board members to three hundred dollars (\$300) per transaction and one thousand dollars (\$1,000) total within any twelve (12)-month period and require that the governing board adopt a policy authorizing such purchases within the preceding twelve (12) months. Districts with fewer than three thousand (3,000) students may purchase supplies, materials, and equipment from governing board members in any amount, provided each purchase is approved by the governing board and the amount of the purchase is included in the board's meeting minutes.

### **Purchases Requiring Bidding**

For transactions of at least ten thousand dollars (\$10,000) and less than one hundred thousand dollars (\$100,00), written price quotations will be requested from at least three (3) vendors. If three (3) written price quotations cannot be obtained, documentation showing the vendors contacted that did not offer written price quotations, or explaining why written price quotations were not obtained, shall be maintained on file in the District office.

For transactions to purchase construction, materials, or services costing more than one hundred thousand dollars (\$100,000), sealed bids and proposals shall be requested.

All transactions must comply with the applicable requirements of the Arizona Revised Statutes, the Arizona Administrative Code and the Uniform System of Financial Records.

### **Purchases Not Requiring Bidding**

Except as otherwise provided above, purchases of less than ten thousand dollars (\$10,000) may be made at the discretion of the Superintendent. Such procurements are not subject to competitive purchasing requirements; however, reasonable judgment should be used to ensure the purchases are advantageous to the District.

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

The District is not required to engage in competitive bidding in order to place a student in a private school that provides special education services if such placement is prescribed in the student's individualized education program and the private school has been approved by the Department of Education Division of Special Education pursuant to A.R.S. 15-765. The placement is not subject to rules adopted by the State Board of Education before November 24, 2009 pursuant to A.R.S. 15-213.

The District may, without competitive bidding, purchase or contract for any products, materials and services directly from Arizona Industries for the Blind, certified nonprofit agencies that serve individuals with disabilities and Arizona Correctional Industries if the delivery and quality of the goods, materials or services meet the District's reasonable requirements.

Intergovernmental agreements and contracts between school districts or between the District and other governing bodies as provided in A.R.S. 11-952 are exempt from competitive bidding under the procurement rules adopted by the State Board of Education pursuant to A.R.S. 15-213 (A.A.C. R7-2-1002(C)(2)).

The District is not required to engage in competitive bidding to make a decision to participate in insurance programs authorized by A.R.S. 15-382.

## **Contract Requirements**

### **Contract Duration**

Unless otherwise provided by law, contracts for materials or services and contracts for job-order-contracting construction services may be entered into if the duration of the contract and the conditions of renewal or extension, if any, are included in the invitation for bids or the request for proposals and if monies are available for the first fiscal period at the time the contract is executed. The duration of contracts for materials or services and contracts for job-order-contracting construction services shall be limited to no more than five (5) years unless the Board determines that a contract of longer duration would be advantageous to the District. Once determined, the decision should be memorialized in meeting minutes and in the contract/bid file. Payment and performance obligations for succeeding fiscal periods are subject to the availability and appropriation of monies. The maximum dollar amount of an individual job order for a job-order-contracting construction service shall be one million dollars (\$1,000,000) or as determined by the Board.

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

### **~~Online Bidding~~**

~~Until such time as the State Board of Education adopts rules for the procurement of goods and information services by school districts and charter schools using electronic, online bidding, the District may procure goods and information services pursuant to A.R.S. 41-2671 through 2673 using the rules adopted by the Department of Administration in implementing 41-2671 through 2673.~~

### **~~Purchases Requiring Bidding~~**

~~Sealed bids and proposals shall be requested for transactions to purchase construction, materials, or services costing more than one hundred thousand dollars (\$100,000). All transactions must comply with the requirements of the Arizona Administrative Code and the Uniform System of Financial Records.~~

### ***Public Inspection and Rationale for Awarding a Contract***

The Governing Board shall make available, for public inspection, all information, all bids, proposals and qualifications submitted, and all findings and other information considered in determining whose bid conforms to the District's invitation for bids. ~~The D~~documentation provided will include information regarding the most advantageous, with respect to price, conformity to the specifications, and other factors, or whose proposal for qualifications are to be used to select and award the bid. Included in this information will be the rationale for awarding a contract for any specified professional services, construction, construction service or materials to an entity selected from a qualified select bidders list or through a school purchasing cooperative. The invitation for bids, request for proposals or request for qualifications shall include a notice that all information and bids, proposals and qualifications submitted will be made available for public inspection.

### **Requirement: Registered Sex Offender Prohibition**

All purchase orders, agreements to purchase, and contracts for services to be provided by personnel other than District employees must include the following statement on the document:

***Registered Sex Offender Restriction.*** Pursuant to this order, the named vendor agrees by acceptance of this order that no employee or subcontractor of the vendor, who is required to register as a sex offender, pursuant to A.R.S. 13-3821, will perform work on District premises or equipment at any time when District students are, or are reasonably expected to be, present. The vendor further agrees by acceptance of this order that a violation of this condition shall be considered a material breach and may result in a cancellation of the order at the District's discretion.

Adopted: \_\_\_\_\_

Note: This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

LEGAL REF.:

A.R.S.

11-952

15-213

15-213.01

15-213.02

15-239

15-323

15-342

15-382

15-765

15-910.02

23-214

34-101 *et seq.*

35-391 *et seq.*

35-393 *et seq.*

38-503

38-511

39-121

41-2632

41-2636

41-4401

A.A.C.

R7-2-1001 *et seq.*

R7-2-1023

R7-2-1029

A.G.O.

I83-136

I87-035

I06-002

Uniform System of Financial Records: VI-G-8 *et seq.*

2 C.F.R. 200.~~214~~

2 C.F.R. 200.321

CROSS REF.:

BCB - Board Member Conflict of Interest

DJ – Purchasing Ethics

DJG - Vendor/Contractor Relations and Sales Calls Requirements

GBEAA - Staff Conflict of Interest

JLIF - Sex Offender Notification

**DJE-R ©**

REGULATION

**BIDDING / PURCHASING PROCEDURES**

All District purchases shall be in accordance with the relevant sections of the Arizona Revised Statutes (including, but not limited to 15-213, 15-323, 23-214 subsection A, 38-503, and 41-4401), and the Arizona school district procurement rules set out in the Arizona Administrative Code (A.A.C.) R7-2-1001 through R7-2-1195. District purchases shall also be in accordance with 2 CFR 200-~~214~~ (Code of Federal Regulations Title 2).

**Definitions**

The definition of a term used in this regulation shall be interpreted as being synonymous with the definition of that term listed at R7-2-1001.

**Preparations of Specifications**

Specifications for goods, services, and construction items are to be prepared in the manner prescribed by rules R7-2-1010 through 1017.

**Procurement of Services**

***Specified Professional Services  
and Construction Services***

When the procurement of construction services or services to be provided by certain professionals are under consideration, designated District personnel shall become fully familiar with and informed on the requirements established in Arizona Revised Statutes Title 34 and Arizona Administrative Code Title 7, Chapter 2, Parts XIV and XV. The assigned District personnel are to seek assistance from qualified consultants, attorneys, and bond counsel as is necessary and applicable to the projects being considered, including but not limited to determinations of the training, qualifications, experience, fitness, licensure, prior performance, and bonding of potential providers. Procurement activities, including securing the services of persons to assist District personnel as referenced above shall be in accordance with all relevant requirements prescribed by federal and state law and the rules of federal, state, county, and municipal agencies for the acquisition, performance and reporting of the services being sought and acquired.

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**Procurement of Services by Certain Other Classes of Providers**

Except as authorized pursuant to R7-2-1002, R7-2-1053, or R7-2-1055, the purchase of services to be provided by clergy, certified public accountants, physicians, dentists, and legal counsel shall be as specified in R7-2-1061 through R7-2-1068. Except as authorized in R7-2-1033, R7-2-1053, R7-2-1055, and R7-2-1122, the procurement of services by an architect, engineer, land surveyor, assayer, geologist, or landscape architect is to be accomplished in compliance with R7-2-1117 through R7-2-1123. Procurement procedures related to purchasing services from the professional providers are to conform to R7-2-1119 through R7-2-1122.

**Construction Procurement Procedures**

Preparation for inviting bids for construction and the steps to be followed in the construction procurement process shall be guided by and consistent with R7-2-1100 through R7-2-1115.

**Sole-Source Procurements**

A contract may be awarded for a material, service, or construction item without competition if the Governing Board determines in writing that there is only one (1) source for the required material, service, or construction item. The District may require the submission of cost or pricing data in connection with an award pursuant to A.A.C. R7-2-1053. Sole-source procurement shall be avoided, except when no reasonable alternative source exists. A copy of the written determination of the basis for the sole-source procurement and any cost or pricing data shall be retained in the procurement file by the District.

The District shall, to the extent practicable, negotiate with the single supplier a contract advantageous to the District.

**Due Diligence**

The District is responsible for ensuring that all procurements are done in accordance with applicable law and school district procurement rules whether the procurement is done independently or through a cooperative purchasing agreement. The appropriate amount and complexity of due diligence to be performed by a district will vary based on the procuring entity with which the district is participating. A.R.S. 15-213(F) requires school districts and school purchasing cooperatives, in connection with any audit conducted by a certified public accountant, to have a systematic review of purchasing practices. The Office of the Auditor General has prescribed the guidelines for performing these reviews as part of the Procurement Compliance Questionnaire for cooperatives and the Expenditures section of the USFR Compliance Questionnaire for districts.

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The District shall develop and follow a clear plan prescribing the purchasing practices to be followed. The plan will describe the elements of internal control and auditing to assure the District's procedures are sufficient to confirm the adequacy of the procurement practices and that the accountability of all personnel engaged in procurement practices is regularly evaluated and corrective measures taken when necessary. The due diligence activities shall include the use of the applicable sections of the Uniform System of Financial Records (USFR) Compliance Questionnaire for school districts when assessing the quality of the procurements procedures and the competence of the persons performing the procedures. Day-to-day and periodic formal checks of due diligence performance are to be documented and retained in a procurement file.

### **Contract Requirements**

Care is to be exercised to assure the District's procurement practices conform to the general contract requirements set out in R7-2-1072 through R7-2-1087 and the accompanying conditions described in R7-2-1092 through R7-2-1093, as applicable.

### **Quotations**

#### ***Requesting Quotations***

Requests for price quotations are to include adequate details and be issued with sufficient lead time to enable vendors to effectively respond. When a contract is to be awarded on the basis of price and additional factors those factors are to be included in the request for quotations. Such factors should include, but are not limited to, the following:

- A. Submittal requirements including:
  1. Date and time due;
  2. Type and manner by which quotations may be received (e.g., telephone, written, fax, e-mail, prepared form);
  3. Physical or digital address to which quotations are to be delivered.
- B. Specific information the quotation must include.
- C. Whether or not negotiations may be held.
- D. Options that may be made pursuant to a purchase contract, i.e., extensions and renewals.

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E. Contracts for job-order-contracting services shall be limited to no more than five (5) years unless the Board determines that a contract of longer duration would be advantageous to the District and has provided for such duration as a part of bid documents and conditions of renewal or extension within contract language. Such determination should be memorialized in writing and kept in the meeting minutes and contract/bid file.

F. Uniform terms and conditions included in the request by text or reference.

G. Such additional terms, conditions, and instructions as are applicable to the purchase under consideration.

All requests for written quotations shall be at the direction of the Superintendent or a person designated by the Superintendent.

When a vendor is selected on the basis of factors other than lowest price, the reasons shall be documented and filed with the price quotations. Documentation of the quotations process and details including vendor names, persons contacted, telephone numbers and identification of other communication procedures, price results, and determinations are to be documented and retained by the District in a procurement file that includes the pertinent requisition form and purchase order.

A written contract or purchase order must be approved prior to a purchase being made.

### **~~Cumulative and Like Item Purchases~~**

~~An analysis shall be performed annually to determine the extent of the District need to purchase like items. Prior year purchases and applicable demographic, program, and planning data are to be utilized for projecting quantity and cost of like items to fulfill the anticipated need. The outcomes of calculating the projected quantity and cost factors to acquire like items shall inform the determinations as to the appropriate procurement processes to be applied. The proper competitive purchasing strategies must be applied to assure District compliance with the procurement laws and rules. Splitting of orders or other purchasing practices devised to circumvent allowable procurement practices are prohibited. The cumulative costs of purchasing like items by any and all means of acquisition are to be tracked to assure that no purchases are permitted that will result in violation of Governing Board policies and lawful procurement practices.~~

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

### ~~Multiple Year Purchases Totaling Less Than One Hundred Thousand Dollars~~

~~The District may enter into contracts of less than one hundred thousand dollars (\$100,000) for a period up to five (5) years, as follows:~~

- ~~A. When the terms and conditions of renewal or extension are included in the solicitation for bids;~~
- ~~B. When monies are available for the first fiscal year at the time of contracting;~~
- ~~C. When the competitive purchasing method is appropriate to the projected cumulative cost over the term of the multiple year contract.~~

### ~~Multiple Year Purchases Totaling More Than One Hundred Thousand Dollars~~

~~The District may enter into contracts for more than one hundred thousand dollars (\$100,000) for a period up to five (5) years, as follows:~~

~~The Governing Board has determined in writing that:~~

- ~~1. The estimated requirements cover the contract period and are reasonable and continuing;~~
- ~~2. A multi term contract will serve the District's best interest by encouraging competition or promoting economies in procurement;~~
- ~~3. If monies are not appropriated or available in future years the contract will be cancelled.~~

~~If multiple year quotations are used, the District shall:~~

- ~~A. Document the time period that the pricing is valid;~~
- ~~B. Determine the vendor will honor the pricing for the multi year period;~~
- ~~C. Secure and maintain written affirmation with the vendor that, although it is the District's intent to purchase certain quantities, all purchases are subject to the availability of funds.~~

### ~~Multiple Awards to More Than One Contractor~~

~~Generally, the District should not use multiple awards allowing more than one (1) vendor to supply the same goods or service. However, there are instances in which the District may make multiple awards. If that instance arises, the request for proposals or invitation for bids should clearly state whether multiple awards may be used so bidders can consider that information when pricing their proposals or bids.~~

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

~~A multiple award to more than one (1) vendor should be made only when the District has determined and documented in writing that a single award is not advantageous to the District. The award should also be limited to the least number of suppliers necessary to meet the District's requirements.~~

## **Bidding**

### ***Bidding Methods***

Sealed bids or proposals will be requested when an award is to be made for a transaction to purchase construction, materials, or services costing more than one hundred thousand dollars (\$100,000). The Superintendent must review the expenditure and make a recommendation to the Board for final action. The Board reserves the right to waive any informality in, or reject, any or all bids or any part of any bid. Any bid may be withdrawn prior to the scheduled time for the opening of bids.

The bidder to whom the award is made may be required to enter into a written contract with the District.

Pursuant to the procurement code, contracts can be let for a period not to exceed five (5) years.

## **Definitions**

~~The definition of a term used in this regulation shall be interpreted as being synonymous with the definition of that term listed at R7-2-1001.~~

### ***Prospective Bidders' Lists***

The District shall compile and maintain a prospective bidders' list. Inclusion of the name of a person shall not indicate whether the person is responsible concerning a particular procurement or otherwise capable of successfully performing a District contract.

Persons desiring to be included on the prospective bidders' list shall notify the District. Upon notification, the District shall mail or otherwise provide the person with the District procedures for inclusion on the bidders' list. Within thirty (30) days after receiving the required information, the District shall add the person to the prospective bidders' list unless the District makes a determination that inclusion is not advantageous to the District.

Persons who fail to respond to invitations for bids for two (2) consecutive procurements of similar items may be removed from the applicable bidders' list after mailing a notice to the person. This notice shall not be required if the two (2) invitations for bids which were not responded to both contained the notice that bidders' names may be removed from the bidders' list if they fail to respond to invitations for bids for two (2) consecutive procurements of similar items. Persons may be reinstated upon request.

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Prospective bidders' lists shall be available for public inspection, unless the District makes a written determination that it is in the best interest of the District that they should be confidential or private and should not be open for inspection pursuant to A.R.S. 39-121.

### ***Competitive Sealed Bidding***

If the intended procurement is for construction to cost less than one hundred fifty thousand dollars (\$150,000), the rules established for the simplified school construction procurement program described at R7-2-1033 may be followed. In all other cases, adequate public notice of the invitation for bids shall be given as provided in R7-2-1022 or as provided in R7-2-1024, which are outlined below, and shall indicate that any bid protest shall be filed with the District representative, who shall be named therein.

If notice is given pursuant to R7-2-1024, notice also may be given as provided in R7-2-1022. If fewer than five (5) prospective bidders are included on the bidders' list, the notice must also be given as provided in R7-2-1022. When the invitation for bids is for the procurement of services other than those described in R7-2-1061 through R7-2-1068 and R7-2-1117 through R7-2-1123, Specified Professional Services, notice also shall be given as provided in R7-2-1022.

#### ***R7-2-1022:***

In the event there are four (4) or less prospective bidders on the bidders' list, the notice shall include publication in the official newspaper of the county within which the school district is located for two (2) publications which are not less than six (6) nor more than ten (10) days apart. The second publication shall not be less than two (2) weeks before bid opening. The time of publication may be altered if deemed necessary pursuant to R7-2-1024(A).

#### ***R7-2-1024:***

Invitation for bids shall be issued at least fourteen (14) days before the time and date set for bid opening in the invitation for bids unless a shorter time is deemed necessary for a particular procurement as determined by the school district.

The school district shall mail or otherwise furnish invitation for bids or notices of the availability of invitation for bids to all prospective bidders registered with the school district for the specific material, service or construction being bid.

The time and date at which a bid is called due shall be during regular working hours at a regular place of school business or during a public meeting of the Governing Board at its regular meeting place.

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Invitations to bid will be sent to all vendors who have requested to bid or who have applied to be placed on a bid list appropriate to the items being sought.

**Bid Call for Construction Projects**

A bid call relating to "construction projects" must describe the nature of the work to be performed and where complete plans, if necessary, may be obtained. Deposits may be required for plans and specifications in good order. A certified check, cashier's check, or surety bond for ten percent (10%) of the bid must accompany each bid, but will be returned to unsuccessful bidders. The successful bidder must present performance and payment bonds for one hundred percent (100%) of the bid within five (5) working days after notification of the award.

**Sealed Bids**

Each sealed bid must be submitted in a sealed envelope, addressed to the District, clearly marked on the outside of the envelope, "Sealed Bid for \_\_\_\_\_." The bids shall be opened publicly and read aloud at the time and place stated in the invitation. Awards shall be made with reasonable promptness to the lowest responsible, qualified vendor, taking into consideration all factors set forth in policy. Price shall not be the sole factor in making the bid award. When out-of-state bidders are not to pay sales/use tax, the amount of such tax shall not be a consideration in determining the low bidder. All proposed contracts for outside professional services in excess of the amount calculated by the State Board of Education and made applicable for the year in which the transaction will occur, may be reviewed by the attorney for the District prior to entering into the contract. The policies relating to outside professional services apply only to services required by law to be placed on bid, and even those policies may be set aside if a state of emergency is declared. If a state of emergency is declared, a memorandum will be issued justifying such a declaration, which will be filed in the District's records.

**Multistep Sealed Bidding**

The multistep sealed bidding method may be used if the Governing Board determines that:

A. Available specifications or purchase descriptions are not sufficiently complete to permit full competition without technical evaluations and discussions to ensure mutual understanding between each bidder and the District;

B. Definite criteria exist for evaluation of technical offers;

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C. More than one (1) technically qualified source is expected to be available; and

D. A fixed-price contract will be used.

The District may hold a pre-technical offer conference with bidders as provided in R7-2-1136(C).

The multistep sealed bidding method may not be used for construction contracts.

When the multistep sealed bidding method is determined to be authorized, the procedures set out in R7-2-1036 and R7-2-1037 shall be followed.

### **Restrictions**

The use of bidding, contracting, or purchasing specifications that are in any way proprietary to one (1) supplier, distributor, or manufacturer is prohibited unless no other resource is practical for the protection of the public interest.

The Board reserves the right to reject any or all bids and to accept the bid that appears to be in the best interest of the District. The Board reserves the right to waive informalities in any bid or to reject any bid, all bids, or any part of any bid. Any bids may be withdrawn prior to the scheduled time for the opening of the bids. Any bids received after the opening begins shall not be accepted. Opening of bids shall not be delayed to accommodate late bid responses. Submitted bids shall be honored for at least thirty (30) days or as otherwise stated in the invitation. All information relating to a bid shall be retained and made available for public inspection after the bids are awarded, and prospective bidders shall be notified of this in the invitation or specifications relating to the bid call.

### **~~Multistep Sealed Bidding~~**

~~The multistep sealed bidding method may be used if the Governing Board determines that:~~

~~A. Available specifications or purchase descriptions are not sufficiently complete to permit full competition without technical evaluations and discussions to ensure mutual understanding between each bidder and the District;~~

~~B. Definite criteria exist for evaluation of technical offers;~~

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

~~C. More than one (1) technically qualified source is expected to be available;  
and~~

~~D. A fixed-price contract will be used.~~

~~The District may hold a conference with bidders before submission or at any time during the evaluation of the unpriced technical offers.~~

~~The multistep sealed bidding method may not be used for construction contracts.~~

~~When the multistep sealed bidding method is determined to be advantageous to the District, the procedures set out in R7-2-1036 and 1037 shall be followed.~~

### **Competitive Sealed Proposals**

If, pursuant to R7-2-1041, the Governing Board determines in writing that the use of competitive sealed bidding is either not practicable or not advantageous to the District, a contract may be entered into by competitive sealed proposals. The Governing Board may make a class determination that it is either not practicable or not advantageous to the District to procure specified types of materials or services by competitive sealed bidding. The competitive sealed proposal method may not be used for construction contracts. The Governing Board may modify or revoke a class determination at any time.

If competitive sealed bidding is neither practicable or advantageous, competitive sealed proposals may be used if it is necessary to:

- A. Use a contract other than a fixed-price type;
- B. Conduct oral or written discussions with offerors concerning technical and price aspects of their proposals;
- C. Afford offerors an opportunity to revise their proposals;
- D. Compare the different price, quality, and contractual factors of the proposals submitted; or
- E. Award a contract in which price is not the determining factor.

Procedures to be applied subsequent to the issuance of an invitation for bids are to be consistent with the requirements set out in R7-2-1025 through R7-2-1032.

Competitive sealed proposals shall be solicited through a request for proposals. The request for proposals shall set forth those factors listed above for competitive sealed bids that are applicable and shall also state:

- A. The type of services required and a description of the work involved;
- B. The type of contract to be used;
- C. An estimate of the duration the service will be required;
- D. That cost or pricing data is required;
- E. That offerors may designate as proprietary portions of the proposals;
- F. That discussions may be conducted with offerors who submit proposals determined to be reasonably susceptible of being selected for award;
- G. The minimum information that the proposal shall contain;
- H. The closing date and time of receipt of proposals; and
- I. The relative importance of price and other evaluation factors.

Procurement of information systems and telecommunications systems shall include, as criteria in the request for proposal, evaluation factors of the total life cycle cost and application benefits of the information systems or telecommunication systems.

Procurement of earth-moving, material-handling, road maintenance and construction equipment shall include, as criteria in the request for proposal, evaluation factors of the total life cycle cost including residual value of the earth-moving, material-handling, road maintenance and construction equipment.

A request for proposals shall be issued at least fourteen (14) days before the closing date and time for receipt of proposals unless a shorter time is determined necessary by the District.

Notice of the request for proposals shall be issued in accordance with R7-2-1022.

Before submission of initial proposals, amendments to requests for proposals shall be made in accordance with R7-2-1026. After submission of proposals, amendments may be made in accordance with R7-2-1036(C).

## ~~Specified Professional Services and Construction Services~~

~~When the procurement of construction services or services to be provided by certain professionals are under consideration, designated District personnel shall become fully familiar with and informed on the requirements established in Arizona Revised Statutes Title 34. The assigned District personnel are to seek assistance from qualified consultants, attorneys, and bond counsel as is necessary and applicable to the projects being considered, including but not limited to determinations of the training, qualifications, experience, fitness, licensure, prior performance, and bonding of potential providers. Procurement activities, including securing the services of persons to assist District personnel as referenced above shall be in accordance with all relevant requirements prescribed by federal and state law and the rules of federal, state, county, and municipal agencies for the acquisition, performance and reporting of the services being sought and acquired.~~

## ~~Procurement of Services by Certain Other Classes of Providers~~

~~The purchase of services to be provided by clergy, certified public accountants, physicians, dentists, and legal counsel shall be as specified in R7-2-1061 through R7-2-1068. The procurement of services by an architect, engineer, land surveyor, assayer, geologist, or landscape architect is to be accomplished in compliance with R7-2-1117 and 1118. Procurement procedures related to purchasing services from the professional providers are to conform to R7-2-1119 through 1122.~~

## ~~Contract Requirements~~

~~Care is to be exercised to assure the District's procurement practices conform to the general contract requirements set out at R7-2-1068 through 1086 and the accompanying conditions described in R7-2-1091 through 1093.~~

## ~~Preparation of Specifications~~

~~Specifications for goods, services, and construction items are to be prepared in the manner prescribed by rules R7-2-1101 through 1105.~~

## ~~Construction Procurement Procedures~~

~~Preparation for inviting bids for construction and the steps to be followed in the construction procurement process shall be guided by and consistent with R7-2-1109 through 1116.~~

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## Awards

### ***Multiple Awards to More Than One Contractor***

Generally, the District should not use multiple awards allowing more than one (1) vendor to supply the same goods or service. However, there are instances in which the District may make multiple awards. If that instance arises, the request for proposals or invitation for bids should clearly state whether multiple awards may be used so bidders can consider that information when pricing their proposals or bids and the request for proposals shall include the criteria the School District will use for selecting vendors for each contract under the multiple award, including as applicable, whether contracts will be awarded by individual line items, groups of line items, or categories, whether contracts will be awarded incrementally, and whether contracts will be awarded by designated regions or locations.

A multiple award to more than one (1) vendor should be made only when the District has determined in writing that a multiple award is necessary and advantageous to the District. Before making the award, the District shall establish procedures for the use of the multiple awarded contracts to ensure that purchases are made from the contracts determined by the School District to offer the lowest cost in satisfying the School District's requirements. The award shall also be limited to the least number of suppliers necessary to meet the District's requirements.

## Purchasing

### ***Cumulative and Like Item Purchases***

An analysis shall be performed annually to determine the extent of the District's need to purchase like items. Prior year purchases and applicable demographic, program, and planning data are to be utilized for projecting quantity and cost of like items to fulfill the anticipated need. The outcomes of calculating the projected quantity and cost factors to acquire like items shall inform the determinations as to the appropriate procurement processes to be applied. The proper competitive purchasing strategies must be applied to assure District compliance with the procurement laws and rules. Splitting of orders or other purchasing practices devised to circumvent allowable procurement practices are prohibited. The cumulative costs of purchasing like items by any and all means of acquisition are to be tracked to assure that no purchases are permitted that will result in violation of Governing Board policies and lawful procurement practices.

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**Multiple Year Purchases Totaling Less Than One Hundred Thousand Dollars**

The District may enter into contracts of less than one hundred thousand dollars (\$100,000) for a period up to five (5) years, as follows:

- A. When the terms and conditions of renewal or extension are included in the solicitation for bids, proposals, or quotes;
- B. When monies are available for the first fiscal year at the time of contracting;
- C. When the competitive purchasing method is appropriate to the projected cumulative cost over the term of the multiple year contract.

Contracts for materials or services and contracts for job-order-contracting construction services may be entered into for more than 5 years if, before the procurement solicitation is issued, the governing board determines in writing that a contract of longer duration would be advantageous to the district. Payment and performance obligations for succeeding fiscal years are subject to the availability and appropriation of monies.

**Multiple Year Purchases Totaling More Than One Hundred Thousand Dollars**

The District may enter into contracts for more than one hundred thousand dollars (\$100,000) for a period up to five (5) years, as follows:

The Governing Board has determined in writing that:

1. The estimated requirements cover the contract period and are reasonable and continuing;
2. A multi-term contract will serve the District's best interest by encouraging competition or promoting economies in procurement; and
3. If monies are not appropriated or available in future years the contract will be cancelled.

If multiple-year quotations are used, the District shall:

- A. Document the time period that the pricing is valid;
- B. Secure and maintain written affirmation that the vendor will honor the pricing for the multi-year period;

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C. Secure and maintain written affirmation with the vendor that, although it is the District's intent to purchase certain quantities, all purchases are subject to the availability of funds.

### **Cooperative Purchasing Agreements**

Procurements in accordance with intergovernmental agreements and contracts between the District and other governmental entities as authorized by Arizona Revised Statute are exempt from competitive bidding requirements pursuant to A.A.C. R7-2-1002(C)(2). Inspection of and payment for materials and services acquired under a cooperative purchasing agreement are the obligation of the District.

### **Emergency Purchases**

An exception to the above procedures for price competition may be made in the event of an emergency involving the health, safety, or welfare of school personnel or students. In such an emergency, declared by the Superintendent, emergency purchase action may be taken without price competition, if necessary. Even under emergency conditions, price competition should be sought if it will not unacceptably delay the correction of the condition requiring emergency procedures. If emergency purchases are made without price competition, a complete written description of the circumstances pursuant to A.A.C. R7-2-1055 shall be included in the procurement file and maintained in the District office.

### **~~Sole Source Procurements~~**

~~A contract may be awarded for a material, service, or construction item without competition if the Governing Board determines in writing that there is only one (1) source for the required material, service, or construction item. The District may require the submission of cost or pricing data in connection with an award pursuant to A.A.C. R7-2-1053. Sole source procurement shall be avoided, except when no reasonable alternative source exists. A copy of the written evidence and determination of the basis for the sole source procurement shall be retained in the procurement file by the District.~~

~~The District shall, to the extent practicable, negotiate with the single supplier a contract advantageous to the District.~~

### **~~Cooperative Purchasing Agreements~~**

~~Procurements in accordance with intergovernmental agreements and contracts between the District and other governing bodies as authorized by Arizona Revised Statute are exempt from competitive bidding requirements under A.R.S. 15-213. Inspection of and payment for materials and services acquired under a cooperative purchasing agreement are the obligation of the District.~~

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## **~~Due Diligence~~**

~~The District is responsible for ensuring that all procurements are done in accordance with school district procurement rules whether the procurement is done independently or through a cooperative purchasing agreement. The District shall develop and follow a clear plan prescribing the purchasing practices to be followed. The plan will describe the elements of internal control and auditing to assure the District's procedures are sufficient to confirm the adequacy of the procurements practices and that the accountability of all personnel engaged in procurement practices is regularly evaluated and corrective measures taken when necessary. The due diligence activities shall include the use of the applicable sections of the Uniform System of Financial Records (USFR) Compliance Questionnaire for school districts when assessing the quality of the procurements procedures and the competence of the persons performing the procedures. Day-to-day and periodic formal checks of due diligence performance are to be documented and retained in a procurement file.~~

## **Federal Regulations for Suspension and Debarment Verification**

If a requisition involves the expenditure of funds received from Federal assistance, these procedures must include a process that confirms and documents verification of vendor suspension and debarment, per 2 CFR § 200.214 (Code of Federal Regulations Title 2). This verification can be done by accessing [www.sam.gov/sam/](http://www.sam.gov/sam/) where names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or other regulatory authority can be found. Federal regulations restrict awards, sub-awards, and contracts with certain parties that are debarred, suspended or otherwise excluded from or ineligible for participation in Federal assistance programs and activities. A covered transaction includes a contract for audit services (that is federally required) and contracts for goods or services in the amount of at least, twenty-five thousand dollars (\$25,000), including subcontracts. Evidence and documentation of this verification process should be maintained by the Superintendent.

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# ADVISORY 901

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**VENDOR / CONTRACTOR RELATIONS AND**  
**SALES CALLS REQUIREMENTS**

**Fingerprinting Requirements**

A contractor, subcontractor or vendor, or any employee of a contractor, subcontractor or vendor, who is contracted to provide services on a regular basis at an individual school shall obtain a valid fingerprint clearance card pursuant to A.R.S. 41-1758 *et seq.* The Superintendent, or a principal subject to approval by the Superintendent, may exempt from the requirement to obtain a fingerprint clearance card a contractor, subcontractor, or vendor whom the Superintendent or principal has determined is not likely to have independent access or unsupervised contact with students as part of their normal job duties while performing services to the school or to the School District. The exemption shall be given in writing and a copy filed in the District office.

The Superintendent shall develop uniform District criterion for making a determination of whether or not an exemption will be granted.

**Required Contract Provisions**

Each District contract shall contain the provisions of statute paraphrased below and the Superintendent shall implement procedures to randomly verify the records of contractor and subcontractor employees to ensure compliance with these warranties.

The contract or agreement with each contractor shall contain the warranties indicated below:

A. Each contractor shall warrant compliance with all federal immigration laws and regulations that relate to their employees and that they have verified employment eligibility of each employee through the E-Verify program. The contractor shall acknowledge that a breach of this warranty shall be deemed a material breach of the contract subject to penalties up to and including termination of the contract.

B. The contractor further acknowledges that the School District retains the legal right to inspect the papers of any contractor or subcontractor employee who works on the contract to ensure compliance by the contractor or subcontractor.

The contractor shall facilitate this right by notice to his employees and supervisors.

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**Sales Calls and Demonstrations**  
**Requirements**

Sales representatives for school services, supplies, or other materials are not permitted to call on teachers or other school staff members except with prior authorization from the Superintendent.

Adopted: \_\_\_\_\_

LEGAL REF.:

A.R.S.

15-341

15-342

15-512

23-214

41-1758 *et seq.*

41-4401

A.A.C.

R7-2-1001

R7-2-1003

R7-2-1004

R7-2-1010

Public Law 92-544

CROSS REF.:

DBF - ~~Budget Hearings and Reviews/Adoption Process, Adoption~~  
and Implementation

DIC - Financial Reports and Statements

DJE - Bidding/Purchasing Procedures

**DJG-R ©**

REGULATION

**VENDOR / CONTRACTOR RELATIONS AND  
SALES CALLS REQUIREMENTS**

**Request for Records**

~~A District appointed contract liaison shall at random times request contractor and subcontractor employment records.~~ Intermittently and without prior notice, the District appointed liaison to each contractor shall request from the individual contractor and subcontractor employees the information required on the I-9 form. Such information shall be used to verify the employee's right to work status and the contractor and subcontractor compliance with contract warranties. A report of the result of this inquiry shall be made to the Superintendent.

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

# ADVISORY 902

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

~~DJGA ©  
SALES CALLS AND DEMONSTRATIONS~~

*Remove per PA 902 - May 2025* (Merged with Policy DJG.)

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

~~DJGAR ©~~

~~REGULATION~~

~~SALES CALLS AND DEMONSTRATIONS~~

*Remove per PA 902 - May 2025*

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

# ADVISORY 903

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DK ©**  
**PAYMENT AND PAYROLL PROCEDURES**

**Payment Procedures**

In order to receive appropriate discounts and maintain good vendor relations, the Board directs the prompt payment of salaries and bills, but only after due care has been taken to assure that such amounts represent proper obligations of the District for services and/or materials received.

The Superintendent will implement procedures for the review of purchase ~~invoices~~ orders to determine that items or services are among those budgeted, itemized goods or services have been satisfactorily supplied, funds are available to cover payment, and invoices are in order and for the contracted amounts.

**Payroll Procedures**

The District will establish two (2) or more days in each month, not more than sixteen (16) days apart, as fixed paydays for payment of wages in accord with Arizona Statute. Employees may choose to have their salaries paid in full upon the last pay date following completion of their assignments or may annualize their pay.

An employee who quits the service of the District shall be paid all wages due on the regular payday for the pay period during which termination occurs. Such wages may be paid by mail if requested.

Notwithstanding A.R.S. 23-351 and 23-353, an employee who is discharged from service of the District shall be paid all wages due within ten (10) calendar days from the date of discharge [A.R.S. 15-502].

Adopted: \_\_\_\_\_

**LEGAL REF.:**

A.R.S.  
15-304  
15-321  
15-502  
15-906  
23-351  
23-353

**CROSS REF.:**

GCQF - Discipline, Suspension, and Dismissal of Professional Staff Members  
GDQD - Discipline, Suspension, and Dismissal of Support Staff Members

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DK-EA ©**

EXHIBIT

**PAYMENT AND PAYROLL PROCEDURES**

**RESOLUTION AUTHORIZING THE EXECUTION OF  
WARRANTS BETWEEN BOARD MEETINGS**

WHEREAS, A.R.S. 15-321 sets forth the procedures for execution of warrants drawn on the District, and

WHEREAS, said statute provides that an order for salary or other expense may be signed between Board meetings if a resolution to that effect has been passed prior to the signing and that order is ratified by the Board at the next regular or special meeting of the Governing Board;

NOW, THEREFORE, BE IT RESOLVED, that said statutory procedure be, and herein is, ordered for use in the District in accordance with the provisions of A.R.S. 15-321.

This resolution was moved, seconded, and passed at a meeting of the \_\_\_\_\_ Governing Board on \_\_\_\_\_, 20\_\_\_\_.

ATTEST:

\_\_\_\_\_  
President

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DK-EB ©**

**EXHIBIT**

**PAYMENT AND PAYROLL PROCEDURES**

**DEFERRED WAGE PAYMENT ELECTION FORM**

By my signature I hereby acknowledge that I have read and understand the School District's policy on deferred/annualized wages. Furthermore, by my signature on this form I am electing to defer payment of my wages on an annualized basis consisting of twenty-six (26) payments. I understand that any change from an annualized election of payment requires that I notify the District prior to the beginning of duty for the fiscal year in which the change is being given.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Position

\_\_\_\_\_  
Printed name

\_\_\_\_\_  
Date signed

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

## **ADVISORY 904**

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

~~DKA ©  
PAYROLL PROCEDURES / SCHEDULES~~

*Remove per PA 904 - May 2025* (Merged with Policy DK)

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

~~DKA-E ©~~

EXHIBIT

~~PAYROLL PROCEDURES / SCHEDULES~~

~~DEFERRED WAGE PAYMENT ELECTION FORM~~

*Remove per PA 904 - May 2025* (Moved to Policy DK-EB.)

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

## **ADVISORY 905**

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**DN ©  
SCHOOL PROPERTIES DISPOSITION**

**Sale or Lease of Property**

The Board may sell or lease to the state, a county, a city, another school district or a tribal government agency any school property required for public purpose provided the sale or lease of the property will not affect the normal operation of a school within the District and the District is in compliance with Policy FCB, Retirement of Facilities, and A.R.S. 15-342.

**Disposition of Surplus Materials**

The School District shall determine the fair market value of excess and surplus property. Except as provided in A.R.S. 15-342, surplus materials, regardless of value, shall be offered through competitive sealed bids, public auction, established markets, trade-in, posted prices, or state surplus property. If unusual circumstances render the above methods impractical, the District may employ other disposition methods, including appraisal or barter, provided the District makes a determination that such procedure is advantageous to the District. Only United States Postal Money Orders, certified checks, cashier's checks, or cash shall be accepted for sales of surplus property unless otherwise approved by the District or for sales of less than one hundred dollars (\$100).

**Exceptions for Disposition of Learning Materials and Equipment**

The Board authorizes the Superintendent to establish regulations for the disposal of surplus or outdated learning materials to nonprofit community organizations when it has been determined that the cost of selling such materials equals or exceeds estimated market value of the learning materials.

The Board may sell used equipment to a charter school or private school before attempting to sell or dispose of the equipment by other means.

**~~Competitive Sealed Bidding~~**

~~Notice of the sale bids shall be publicly available from the District at least ten (10) days before the date set for opening bids. Notice of the sale bids shall be mailed to prospective bidders, including those on lists maintained by the District pursuant to A.A.C. R7-2-1023. The notice of the sale bids shall list the materials offered for sale; their location; availability for inspection; the terms and conditions of sale; and instructions to bidders, including the place, date, and time set for bid opening. Bids shall be opened publicly pursuant to the requirements of A.A.C. R7-2-1029.~~

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

~~The award shall be made, in accordance with the provisions of the notice of the sale bids, to the highest responsive and responsible bidder, provided that the price offered by such bidder is acceptable to the District. If the District determines that the bid is not advantageous to the District, the District may reject the bids in whole or in part and may resolicit bids, or the District may negotiate the sale, provided that the negotiated sale price is higher than the highest responsive and responsible bidder's price.~~

### **Auctions**

Auctions shall be advertised at least two (2) times prior to the auction date in a newspaper of the county as defined in A.R.S. 11-255. Advertisements must be at least seven (7) days apart. All of the terms and conditions of any sale shall be available to the public at least twenty-four (24) hours prior to the auction date.

Before surplus materials are disposed of by trade-in to a vendor for credit on an acquisition, the District shall approve such disposal. The District shall base this determination on whether the trade-in value is expected to exceed the value realized through the sale or other disposition of such materials.

An employee of the District or a Governing Board member shall not directly or indirectly purchase or agree with another person to purchase surplus property if said employee or Board member is, or has been, directly or indirectly involved in the purchase, disposal, maintenance, or preparation for sale of the surplus material.

### **State Surplus Property Manager**

Except as provided in A.R.S. 15-342, the District may enter into an agreement with the State Surplus Property Manager for the disposition of property pursuant to Article 8 of the Arizona Procurement Code [A.R.S. 41-2601 et seq.] and the rules promulgated thereunder.

### **Donation of Surplus**

The Board may donate surplus or outdated learning materials, educational equipment and furnishings to nonprofit community organizations where the Board determines the anticipated cost of selling the learning materials, educational equipment or furnishings equals or exceeds the estimated market value of the materials.

### **Offer to Sell**

The Board may offer to sell outdated learning materials, educational equipment or furnishings at a posted price commensurate with the value of the item to pupils who are currently enrolled in the District before those materials are offered for public sale.

Adopted: \_\_\_\_\_

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

LEGAL REF.:

A.R.S.

15-341

15-342

15-727

15-729

A.A.C.

R7-2-1131

A.G.O.

I80-036

I80-189

U.S.F.R. Sec. III-J-5(10); App. B(6)

CROSS REF.:

BCB - Board Member Conflict of Interest

FCB - Retirement of Facilities

GBEAA - Staff Conflict of Interest

IJJ - Textbook/Supplementary Materials Selection and Adoption

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.



**Policy Advisory No. 907**

**Policy JLF — Reporting Child Abuse /  
Child Protection**

Senate Bill 1437 amends A.R.S. 13-3620 and A.R.S. 15-514 relating to mandatory reporting. Although Policy JLF already requires Board Members to report conduct involving minors subject to mandatory reporting under A.R.S. 13-3620, additional language has been included to ensure alignment with SB1437. Definitions and headings were added to improve clarity.

**Policy Advisory No. 908**

**Policy JR — Student Records  
Regulation JR-R — Student Records**

House Bill 2514 amends A.R.S. 15-102 and A.R.S. 15-142 relating to parental involvement in schools and student directory information. Policy JR and Regulation JR-R have been updated to ensure compliance with the new requirements. Subheadings were added to the regulation to support clarity and organization.



If you have any questions, call Policy Services at (602) 254-1100. Ask for Dr. Charlotte Patterson, Policy Analyst; Lynne Bondi, Policy Analyst; or Renae Watson, Policy Technician. Our e-mail addresses are, respectively, [cpatterson@azsba.org], [lbondi@azsba.org] and [rwatson@azsba.org]. You may also fax information to (602) 254-1177.

**Note: This material is written for informational purposes only, and not as legal advice. You may wish to review the policy references and consult an attorney for further explanation.**

# ADVISORY 906

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**IJNDB ©  
USE OF TECHNOLOGY RESOURCES  
IN INSTRUCTION**

**Appropriate Use of Electronic  
Information Services**

The District may provide electronic information services (EIS) to qualified students, teachers, and other personnel who attend or who are employed by the District. Electronic information services include networks (e.g., LAN, WAN, Internet), databases, cloud-based systems, and any computer-accessible source of information, whether from hard drives or other electronic sources. The use of the services shall be in support of education, research, and the educational goals of the District. To assure that the EIS is used in an appropriate manner and for the educational purposes intended, the District will require anyone who uses the EIS to follow its guidelines and procedures for appropriate use. Anyone who misuses, abuses, or chooses not to follow the EIS guidelines and procedures will be denied access to the District's EIS and may be subject to disciplinary and/or legal action.

The Superintendent shall determine steps, including the use of an Internet filtering mechanism, that must be taken to promote the safety and security of the use of the District's online computer network when using electronic mail, chat rooms, instant messaging, and other forms of direct electronic communications. Technology protection measures shall protect against Internet access by both adults and minors to visual depictions that are obscene, child pornography or, with respect to use of computers by minors, harmful to minors. Safety and security mechanisms shall include online monitoring activities.

**Inappropriate Use of Electronic  
Information Services**

As required by the Children's Internet Protection Act and A.R.S. 15-120.05, the prevention of inappropriate network usage includes unauthorized access, including "hacking," and other unlawful activities; unauthorized disclosure, use and dissemination of personal identification information regarding minors; and student use of wireless communication devices.

It is the policy of the Board to:

A. prevent user access over the District's computer network, or transmissions of, inappropriate material via Internet, electronic mail, or other forms of direct electronic communications;

B. Limit the use of wireless communication devices and access to social media networks by students during the school day;

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

~~B. C.~~ prevent unauthorized access and other unlawful online activity;

~~C. D.~~ prevent unauthorized online disclosure, use, or dissemination of personal identification information of minors; and

~~D. E.~~ comply with the Children's Internet Protection Act [P.L. No. 106-554 and 47 U.S.C. 254(h)] and A.R.S. 15-120.05.

Each user will be required to sign an EIS user's agreement. The District may log the use of all systems and monitor all system utilization. Accounts may be closed and files may be deleted at any time. The District is not responsible for any service interruptions, changes, or consequences. The District reserves the right to establish rules and regulations as necessary for the efficient operation of the electronic information services.

The District does not assume liability for information retrieved via EIS, nor does it assume any liability for any information lost, damaged, or unavailable due to technical or other difficulties.

### **Generative Artificial Intelligence Programs**

The proper use of Artificial Intelligence (AI) programs can be effective at enhancing student learning and can prepare students with the competencies and knowledge needed in the digital age. Its use should also be guided by responsible and ethical considerations, including mitigating bias, promoting transparency, and providing AI benefits to all students. Use of AI programs in the classroom should be approved by the site administrator or Superintendent, and teachers' instructions and expectations should guide the classroom use of AI. Teachers should include relevant lessons on correct and responsible use of AI, and students should be taught standards regarding plagiarism and source citation and should use these guidelines if AI is used for a school assignment. AI use should be guided and monitored by teachers and/or administrators and should align with the District's guidelines and policies, including any relevant student rules/responsibilities. AI resources should be available to all students, including those with disabilities and English language learners. Use of an AI system should comply with the Family Educational Rights and Privacy Act (FERPA) and should support data privacy and security.

### **Filtering and Internet Safety**

As required by the Children's Internet Protection Act, the District shall provide for technology protection measures that protect against Internet access by both adults and minors to visual depictions that are obscene, child pornography, or, with respect to use of the computers by students, harmful to students. The protective measures shall also include monitoring the online activities of students.

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

Limits, controls, and prohibitions shall be placed on student:

- A. Access to inappropriate matter.
- B. Safety and security in direct electronic communications.
- C. Unauthorized online access or activities.
- D. Unauthorized disclosure, use and dissemination of personal information.

### **Education, Supervision and Monitoring**

It shall be the responsibility of all District employees to be knowledgeable of the Board's policies and administrative guidelines and procedures. Further, it shall be the responsibility of all employees, to the extent prudent to an individual's assignment to educate, supervise, and monitor appropriate usage of the online computer network and access to the Internet in accordance with this policy, the Children's Internet Protection Act, ~~and~~ the Protecting Children in the 21st Century Act, and A.R.S. 15-120.05.

The Superintendent shall provide for appropriate training for District employees and for students who use the District's computer network and have access to the Internet. Training provided shall be designed to promote the District's commitment to:

- A. the standards and acceptable use of the District's network and Internet services as set forth in District policy;
- B. student safety in regards to use of the Internet, appropriate behavior while using, but not limited to, such things as social ~~networking Web sites~~ media platforms, online opportunities and chat rooms; and cyberbullying awareness and response; and compliance with E-rate requirements of the Children's Internet Protection Act. Teachers are allowed to give students access to social media platforms to the extent necessary for educational purposes.

### **Wireless Communication Devices**

Districts shall limit student use of wireless communication devices during the school day except if any of the following apply:

- A. for educational purposes, as directed by the student's teacher.

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B. during an emergency.

C. The student needs the student's wireless communication device because the student has a medical condition.

Procedures shall include guidelines for a student's parent to contact the student during the school day and for a student to contact the student's parent during the school day.

While training will be subsequently provided to employees under this policy, the requirements of the policy are effective immediately. Employees will be held to strict compliance with the requirements of the policy and the accompanying regulation, regardless of whether training has been given.

The Superintendent is responsible for the implementation of this policy and for establishing and enforcing the District's electronic information services guidelines and procedures for appropriate technology protection measures (filters), monitoring, and use.

### **Parent Notification**

At the beginning of each school year, parents, teachers and students will be notified of the policies regarding the use of technology and the Internet while at school. The District shall provide to parents, teachers and students a copy of the adopted policies and notify the parents, teachers and students of any changes to the policy.

Parents will also be notified of their ability to prohibit the student from the use of technology and the Internet while at school in which covered information may be shared with an operator pursuant to A.R.S. 15-1046. This does not apply to software or technology that is used for the daily operations or administration of a local education agency or Arizona Online instruction programs authorized pursuant to A.R.S. 15-808.

### **Definitions:**

A. "School day" means periods of time when students are at school, including meals, passing periods and recess.

B. "Social media platform" means a website, computer application or other digital platform that is used for social networking and creating or exchanging virtual content.

C. "Wireless communication devices" includes personal devices and devices that are provided by the school.

Adopted: \_\_\_\_\_

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

LEGAL REF.:

A.R.S.

13-2316

13-3506.01

13-3509

15-120.05

15-341

15-808

15-1046

34-501

34-502

20 U.S.C. 1232g, the Family Educational Rights and Privacy Act

20 U.S.C. 1232h, the Protection of Pupil Rights Amendment

20 U.S.C. 1400 *et seq.*, Individuals with Disabilities Education Act

20 U.S.C. 6301 *et seq.*, Every Student Succeeds Act of 2015

20 U.S.C. 9134, The Children's Internet Protection Act

47 U.S.C. 254, Communications Act of 1934 (The Children's  
Internet Protection Act)

16 CFR Part 312, Children's Online Privacy Protection Rule (COPPA)

IJNDB-R ©

REGULATION

**USE OF TECHNOLOGY RESOURCES  
IN INSTRUCTION**

**(Safety and use of Electronic  
Information Services)**

Use of the electronic information services (EIS) requires that the use of the resources be in accordance with the following guidelines and support the education, research, and educational goals of the District. Filtering, monitoring, and access controls shall be established to:

A. Limit access by minors to inappropriate matter on the Internet and World Wide Web.

B. Limit the use of wireless communication devices by students during the school day.

~~B. C.~~ Monitor the safety and security of minors when using electronic mail, chat rooms, and other forms of direct electronic communications.

~~C. D.~~ Monitor for unauthorized access, including so-called "hacking," and other unlawful activities by minors online.

~~D. E.~~ Restrict access by minors to materials harmful to minors.

**Content Filtering**

A content filtering program or similar technology shall be used on the networked electronic information services (EIS) as well as on standalone computers capable of District authorized access to the Internet. The technology shall at a minimum limit access to obscene, profane, sexually oriented, harmful, or illegal materials. Should a District adult employee have a legitimate need to obtain information from an access-limited site, the Superintendent may authorize, on a limited basis, access for the necessary purpose specified by the employee's request to be granted access.

**Education, Supervision, and  
Monitoring**

It is the responsibility of all District employees to be knowledgeable of the Board's policy and administrative regulations and procedures related to the use of technology resources. Employees are further responsible, to the extent prudent to an individual's assignment, to educate, supervise, and monitor student use of the District's online computer network. District, department, and school administrators shall provide employees with appropriate in-servicing and assist employees with the implementation of Policy IJNDB.

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

As a means of providing safety and security in direct electronic communications and to prevent abuses to the appropriate use of electronic equipment, all computer access to the Internet through the District electronic information services (EIS) or standalone connection shall be monitored periodically or randomly through in-use monitoring or review of usage logs.

### **Access Control**

Individual access to the EIS shall be by authorization only. Designated personnel may provide authorization to students and staff who have completed and returned an electronic information services user agreement. The Superintendent may give authorization to other persons to use the EIS.

### **Acceptable Use**

Each user of the EIS shall:

- A. Use the EIS to support personal educational objectives consistent with the educational goals and objectives of the School District.
- B. Agree not to submit, publish, display, or retrieve any defamatory, inaccurate, abusive, obscene, profane, sexually oriented, threatening, racially offensive, or illegal material.
- C. Abide by all copyright and trademark laws and regulations.
- D. Not reveal home addresses, personal phone numbers or personally identifiable data unless authorized to do so by designated school authorities.
- E. Understand that electronic mail or direct electronic communication is not private and may be read and monitored by school employed persons.
- F. Not use the network in any way that would disrupt the use of the network by others.
- G. Not use the EIS for commercial purposes.
- H. Follow the District's code of conduct.
- I. Not attempt to harm, modify, add, or destroy software or hardware nor interfere with system security.
- J. Understand that inappropriate use may result in cancellation of permission to use the electronic information services (EIS) and appropriate disciplinary action up to and including expulsion for students.

In addition, acceptable use for District employees is extended to include requirements to:

- A. Maintain supervision of students using the EIS.
- B. Agree to directly log on and supervise the account activity when allowing others to use District accounts.
- C. Take responsibility for assigned personal and District accounts, including password protection.
- D. Take all responsible precautions, including password maintenance and file and directory protection measures, to prevent the use of personal and District accounts and files by unauthorized persons.
- E. Pursuant to A.R.S. 15-120.05, teachers may grant access to social media networks for educational purposes.

Each user will be required to sign an EIS user agreement. A user who violates the provisions of the agreement will be denied access to the information services and may be subject to disciplinary action. Accounts may be closed and files may be deleted at any time. The District is not responsible for any service interruptions, changes, or consequences.

Details of the user agreement shall be discussed with each potential user of the electronic information services. When the signed agreement is returned to the school, the user may be permitted use of EIS resources through school equipment.

### **Wireless Communication Device Guidelines**

Students must follow all District rules and procedures for the use of wireless communication devices.

#### **Acceptable Use**

Students may use wireless communication devices:

- A. for educational purposes, as directed by the student's teacher
- B. during an emergency; and/or as needed for a medical condition.
- C. With permission from a teacher or staff member, a student may contact their parent/legal guardian using the student's cellular telephone.

**Insert optional District language here regarding additional District-level requirements.**

# ADVISORY 907

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**JLF ©**  
**REPORTING CHILD ABUSE /**  
**CHILD PROTECTION**

**Mandatory Reporting**

Any school personnel, including substitute teachers and any member of a school district governing board or charter school governing body, or any other person who has responsibility for the care or treatment of a minor and who reasonably believes that a minor is or has been the victim of physical injury, abuse, child abuse, a reportable offense or neglect that appears to have been inflicted upon the minor by other than accidental means or that is not explained by the available medical history as being accidental in nature or who reasonably believes there has been a denial or deprivation of necessary medical treatment or surgical care or nourishment with the intent to cause or allow the death of an infant who is protected under A.R.S. 36-2281 shall immediately report or cause reports to be made of such information to a peace officer or to the Department of Child Safety (DCS) of the Department of Economic Security, except if the report concerns a person who does not have care, custody, or control of the minor, the report shall be made to a peace officer only. Such reports shall be made immediately either electronically or by telephone. A report to a school resource officer or a school safety officer does not satisfy the reporting requirements of A.R.S. 13-3620.

When a report is received by a school resource officer or school safety officer, the officer shall immediately notify a law enforcement agency in the appropriate jurisdiction and shall submit to the local law enforcement agency all information relating to the report for the purposes of the law enforcement agency investigating the reported conduct.

The Arizona Department of Economic Security, Division of Children, Youth and Families, has determined that all mandated reporters may now electronically submit non-emergency reports via a secure online reporting website. Non-emergency reports are those in which a child is not at immediate risk of abuse or neglect that could result in serious harm. Mandated reporters will be able to submit non-emergency reports twenty-four (24) hours a day without wait times.

All reports made via the online website will *require the person making the report (reporting source) to provide contact information*. A representative from the Child Abuse Hotline may contact the source for additional information, if necessary. This process will make it more convenient to meet the mandated reporting requirements and help ensure child safety.

All *emergency situations* where a child faces an immediate risk of abuse or neglect that could result in serious harm *must* still be reported by calling 911 or 1-888-SOS-CHILD (1-888-767-2445). If a reporting source is unsure as to whether or not the report is an emergency situation, the reporting source should call the Child Abuse Hotline to make a report.

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

Any concerns for the safety of a child due to abuse, neglect or abandonment, *must be reported*, by:

Calling 1-888-SOS-CHILD (1-888-767-2445),

TDD: 602-530-1831 (1-800-530-1831), or

Submitting *non-emergency* concerns via the Online Reporting Service at <https://dcs.az.gov/about/contacts>.

Pursuant to A.R.S. 13-3620, such reports shall contain, if known:

- A. The names and addresses of the minor, the parents, or the person or persons having custody of such minor, if known.
- B. The minor's age and the nature and extent of the minor's abuse, child abuse, or physical injuries or neglect, including any evidence of previous abuse, child abuse, physical injury or neglect.
- C. Any other information that such person believes might be helpful in establishing the cause of the abuse, child abuse, physical injury or neglect.

A person who furnishes a report, information, or records required or authorized under Arizona Revised Statutes or a person who participates in a judicial or administrative proceeding or investigation resulting from a report, information or records required or authorized under Arizona Revised Statutes is immune from any civil or criminal liability by reason of that action unless such person has acted with malice or unless such person has been charged with or is suspected of abusing or neglecting the child or children in question.

### **Interviewing Requirements**

A student who is identified as a potential victim of a reportable offense may be interviewed only as provided by the local county protocol that is adopted pursuant to A.R.S. 8-817. This does not prevent a school safety officer or a school resource officer from either:

- A. receiving a voluntary report of a reportable offense from a student who is an alleged victim.
- B. asking a student minimal follow-up questions that are necessary and authorized by the county protocol.

### **Reporting Not Required**

A report is not required under A.R.S. 13-3620 for conduct prescribed by A.R.S. 13-1404 and 13-1405 if the conduct involves only minors who are fourteen (14), fifteen (15), sixteen (16) or seventeen (17) years of age and there is nothing to indicate that the conduct is other than consensual.

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A report is not required if a minor is of elementary school age, the physical injury occurs accidentally in the course of typical playground activity during a school day, occurs on the premises of the school that the minor attends and is reported to the legal parent or guardian of the minor and the school maintains a written record of the incident. The school will maintain a written record of the physical injury as part of the student's health file as required by Arizona State Library, Archives and Public Records (ASLAPR).

### **Failure to Report**

A person who fails to report abuse as provided in A.R.S. 13-3620 is guilty of a Class 1 misdemeanor, except if the failure to report involves a reportable offense, the person is guilty of a Class 6 felony.

Any certificated person or Governing Board member who reasonably suspects or receives a reasonable allegation that a person certificated by the Department of Education has engaged in conduct involving minors that would be subject to the reporting requirements of A.R.S. 13-3620 shall report or cause reports to be made to the Department of Education in writing as soon as is reasonably practicable but not later than three (3) business days after the person first suspects or receives an allegation of the conduct.

Any person who is employed as the immediate or next higher-level supervisor to or administrator of a person who is statutorily required to report is not required to report if the supervisor or administrator reasonably believes that the report has been made by the person who is required to report.

Any school employee who has orally reported to DCS or a peace officer a reasonable belief of an offense to a minor must provide written notification to the principal of the oral report not later than the next workday following the making of the report.

### **Posting Requirements**

Each school that is operated by a school district and each charter school shall post in a clearly visible location in a public area of the school that is readily accessible to students a sign that contains all of the following:

- A. In boldfaced type, the telephone number of the centralized intake hotline concerning suspected abuse and neglect of children that is established pursuant to A.R.S. 8-455.
- B. Instructions to call 911 for emergencies.
- C. Directions for accessing the website of the Department of Child Safety for more information on reporting child abuse, child neglect and the exploitation of children.

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## **Definitions**

School Safety Officer: a peace officer who is working in an off-duty capacity at a school. [A.R.S. 15-514]

School Resource Officer: A peace officer or a full-authority reserve peace officer who is certified by the Arizona Peace Officer Standards and Training Board (AZPOST). [A.R.S. 15-154]

Peace Officer: “Peace officers” means sheriffs of counties, constables, marshals, policemen of cities and towns, commissioned personnel of the department of public safety, personnel who are employed by the state department of corrections and the department of juvenile corrections and who have received a certificate from the Arizona Peace Officer Standards and Training Board (AZPOST). [A.R.S. 1-215]

Adopted: \_\_\_\_\_

### LEGAL REF.:

A.R.S.

1-215

8-201

13-1404 *et seq.*

13-1410

13-3019

13-3212

13-3506

13-3506.01

13-3552

13-3553

13-3608

13-3619

13-3620

13-3623

15-154

15-160.01

15-514

46-451

46-454

### CROSS REF.:

GBEB - Staff Conduct

GBEBB - Staff Conduct With Students

JKA - Corporal Punishment

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

# ADVISORY 908

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**JR ©  
STUDENT RECORDS**

Required student records (regular and special education) will be prepared in a manner consistent with state and federal laws, the requirements of the Arizona Uniform System of Financial Records (USFR) and those of the Arizona Department of Libraries, Archives and Public Records. Retention periods and disposition of records shall be as specified in the USFR, the Arizona Department of Library Archives and Public Records and relevant federal statutes and regulations.

The District will comply with the provisions of the Family Educational Rights and Privacy Act (FERPA) and the Individuals with Disabilities Education Act (IDEA), the Uniting and Strengthening America by Providing Appropriate Tools Required to Intercept and Obstruct Terrorism Act of 2001 (USA PATRIOT ACT), and the Every Student Succeeds Act of 2015 (ESSA) in the establishment, maintenance, correction, and disposition of student records.

The Board directs the Superintendent to establish procedures for such compliance, including informing parents, students, and the public of the contents. The Superintendent will implement procedures as required by law and will establish procedures for dealing with violations.

If a parent or eligible student believes that the District is violating the FERPA, that person has a right to file a complaint with the U.S. Department of Education. The address is:

The Family Policy Compliance Office  
U.S. Department of Education  
400 Maryland Avenue, SW  
Washington, DC 20202-4605  
Telephone number: (202) 260-3887

In adopting this policy, it is the intent of the Board that the policy and related procedures be implemented immediately. Copies of the policy and procedures will be available for parent and eligible student review in the District office.

**Confidentiality**

The right to inspect and review education records and the release of or access to such records, other information, or instructional materials will be consistent with federal law in the Family Educational Rights and Privacy Act, Title 20, United States Code, sections 1232g and 1232h, the USA PATRIOT ACT, ESSA and with federal regulations issued pursuant to such act.

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## Annual Notification

Within the first three (3) weeks of each school year, the District will publish in a District communication a notice to parents and eligible students of their rights under the FERPA and this procedure. This notice will also be provided to each parent of new students enrolling after school begins [34 C.F.R. 99.7]. The District will arrange to provide translation of the notice to non-English-speaking parents in their native language or mode of communication [34 C.F.R. 300.9]. The notice shall inform the parents of:

- A. The right of the parent or an eligible student to inspect and review the student's education records.
- B. The intent of the District to limit the disclosure of personally identifiable information contained in a student's education records, including disciplinary records, except by the prior written consent of the parent or eligible student or under certain limited circumstances as permitted by the FERPA, the USA PATRIOT Act or the ESSA.
- C. The right of the parent or eligible student to seek to correct parts of the school education records that the student or the parent believes to be inaccurate, misleading, or in violation of student rights. This right includes the right to a hearing to present evidence that the record should be changed if the District decides not to alter it according to the parent's or eligible student's request.
- D. The right of the parent or eligible student to file a complaint with the U.S. Department of Education if they believe the District has violated the FERPA.

Parents and eligible students have the following rights under the Family Educational Rights and Privacy Act (FERPA) and this procedure [34 C.F.R. 99.7 and 300.613]. The notice shall also include:

- A. The procedure for exercising the right to inspect and review education records.
- B. The procedure for requesting amendments of education records that the parent or eligible student believe to be inaccurate, misleading or otherwise a violation of the student's privacy rights.
- C. The conditions when prior consent is not required, the criteria for determining who constitutes a school official and what constitutes a legitimate educational interest.

**Directory Information:**

A. Except as provided in subsection B of A.R.S. 15-142, a school may only disclose directory information relating to students, in accordance with state and federal law, if the school first notifies the parent or eligible student of all of the following:

1. The types of information that the school has designated as directory information.
2. The right of the parent or eligible student to refuse the school's designation of any or all of the types of information about the student as directory information.
3. The period of time within which a parent or eligible student must notify the school in writing that the parent or eligible student does not want any or all of the types of information about the student designated as directory information.

B. Except as required by state or federal law, a school may not disclose the address, telephone number or e-mail address of a student unless either:

1. The parent or eligible student has affirmatively consented in writing to the disclosure; or
2. The parent or eligible student has not opted out of the disclosure pursuant to subsection A of A.R.S. 15-142 and the disclosure is either:
  - a. To one (1) or more students who are enrolled in the school and for educational purposes; or
  - b. To school employees and for school business purposes.

If the School District ~~permits~~ allows the release of directory information relating to ~~pupils~~ students, subject to subsections A and B of A.R.S. 15-142, the information shall be released on or before October 31 of each year.

The Superintendent shall develop procedures to communicate to students and their parents ~~in a timely manner~~ information relating to access to the Arizona Department of Education form which is designed to allow ~~pupils~~ parents and eligible students to request that directory information not be released pursuant to the Elementary and Secondary Education Act (ESEA) as reauthorized by the Every Student Succeeds Act of 2015 (ESSA).

**Definition**

For the purposes of this section, "eligible student" means a student who is at least eighteen (18) years of age or is emancipated.

Adopted: \_\_\_\_\_

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

LEGAL REF.:

A.R.S.

15-141

15-142

15-828

15-829

25-403.06

44-1373

10 U.S.C. 503

20 U.S.C. 1232

20 U.S.C. 1400 *et seq.*, Individuals with Disabilities Education Act

20 U.S.C. 6301 *et seq.*, Every Student Succeeds Act of 2015

20 U.S.C. 7908

34 C.F.R. 300

CROSS REF.:

IHB - Special Instructional Programs

JF - Student Admissions

JFAB - Admission of Nonresident Students

JLH - Missing Students

JRCA - Request for Transfer of Records

JR-R ©

REGULATION

**STUDENT RECORDS**

This ~~procedure~~ regulation is designed to meet the provisions of the Family Educational Rights and Privacy Act (FERPA) and the Individuals with Disabilities in Education Act (IDEA). All personnel in the District are expected to fulfill the requirements of policy and the following procedures in order to protect the confidentiality of personally identifiable information at collection, storage, disclosure, and destruction stages [34 C.F.R. 300.612].

The Superintendent has the responsibility for ensuring the confidentiality of any personally identifiable information [34 C.F.R. 300.612].

All rights and protections given parents under the FERPA and this ~~procedure~~ regulation transfer to the student upon reaching age eighteen (18) except where the student continues as a dependent under specified circumstances, or enrolling in a postsecondary school. The student then becomes an "eligible student" [34 C.F.R. 99.5 and 300.625].

**Definitions**

For the purpose of ~~this procedure~~ regulation, the District has used the following definitions of terms:

- A. *Student* - Any person who attends or has attended a program of instruction sponsored by the District and for whom the District maintains education records.
- B. *Eligible student* - A student who ~~has reached age~~ is at least eighteen (18) years of age or is ~~attending a postsecondary school~~ emancipated.
- C. *Parent* - Either the natural parent of a student, unless the parent's rights under the FERPA have been removed by a court order, statute, or other legal document, or a guardian, or an individual acting as a parent or guardian in the absence of the student's parent or guardian. The District may presume that the parent has the authority to inspect and review education records relating to his or her child unless the District has been advised that the parent does not have authority under applicable law.
- D. *Education records* - Any information directly related to a student recorded in any way including, but not limited to, handwriting, print, computer media, video or audio tape, film, microfilm or microfiche, that is maintained by the District, an employee of the District, or any agent of the District except:

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1. Personal records kept by an employee of the District that meets the following tests:
  - a. It is used only as a personal memory aid.
  - b. It is kept in the personal possession of the individual who made it.
  - c. It is not accessible and has never been revealed to any other person except the employee's temporary substitute.
2. Medical treatment records maintained for "eligible students."
3. Records collected and maintained by a law enforcement unit of the school.
4. Records containing only information about a person after that individual is no longer a student in the District.
5. An employment record that is used only in relation to a student's employment by the District. (*Employment for this purpose does not include activities for which a student receives a grade or credit in a course.*)
6. Related alumni records after the student no longer attends classes provided by the District, and the records do not relate to the person as a student.

E. *Personally identifiable information* - Any data or information that makes the subject of a record known. This includes the student's name, the name(s) of the student's parent(s) or other family member(s), the student's address, the student's Social Security number, a student number, a list of personal characteristics, or other information that would make the student's identity easily traceable.

F. *Signed and dated written consent* - May include a record and signature in electronic form that:

1. Identifies and authenticates a particular person as the source of the electronic consent.
2. Indicates such person's approval of the information contained in the electronic consent.

### **Locations of Education Records**

A list of types and locations of education records collected, maintained, or used will be provided to the parents on request [34 C.F.R. 300.616]. See Exhibit JR-EA.

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## **Procedure to Inspect Education Records**

Parents of a student, the designated representative of the parents, and an eligible student may inspect and review the student's education records that are collected, maintained, or used by the District [34 C.F.R. 300.501]. In some circumstances it may be mutually more convenient for the record custodian to provide copies of records. Charges for the copies of records will be costs of copying unless the fee would effectively prevent the parent from exercising rights to inspect and review those records [34 C.F.R. 300.613 and 300.617].

Since a student's records may be maintained in several locations, the school principal will offer to collect copies of records or the records themselves from locations other than a student's school so they may be inspected at one (1) site. However, if parents and eligible students wish to inspect records where they are maintained, the school's principal will make every effort to accommodate their wishes.

Parents, the designated representative of the parents, or the eligible student should submit to the student's school principal a signed and dated written request that identifies as precisely as possible the record or records wanted for inspection. The District will respond to any request without unnecessary delay before any meeting regarding any individual education program or hearing relating to the identification, evaluation, placement of a student, or the provision of a free appropriate public education, and in no case more than forty-five (45) days after the request has been made [34 C.F.R. 300.613 and 99.10]. See Exhibit JR-ED.

The principal, or other education records custodian, will contact the parent of the student or the eligible student to discuss how access will be best arranged (e.g., copies, at the exact location, or records brought to a single site).

Parents have the right, upon reasonable request, for explanations and interpretations of the information contained in the records and a right to request copies of the records containing the information, if not in violation of stated policy of FERPA. Parents have the right to have a representative of the parent to inspect and review the records [34 C.F.R. 300.613 and 99.10].

The principal, or other education records custodian, will make the needed arrangements as promptly as possible and notify the parent or eligible student of the time and place where the records may be inspected. This procedure must be completed in forty-five (45) days or less after receipt of the request for access [34 C.F.R. 300.613].

If for any valid reason, such as working hours, distance between record location sites, or health, the parent or eligible student cannot personally inspect and review a student's education records, the District will arrange for the parent or eligible student to obtain copies of the record. See below for information regarding fees for copies of records [34 C.F.R. 300.613 and 99.10].

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When a record contains information about students other than a parent's child or the eligible student, the parent or eligible student may not inspect and review the records of the other students [34 C.F.R. 300.615, 99.5 and 99.12].

### **Fees for Copies of Records**

All records subject to disclosure under this procedure shall be available for inspection free of charge. If copies are desired, they shall be furnished by the District to the parent or eligible student on request and free of charge. Additional copies may be sent to other schools or agencies without charge. However, the District reserves the right to charge up to thirty-five cents (35¢) per page for multiple or excessive requests. Copies of available records shall be produced as promptly as possible upon receipt of the request. No fee will be charged for search and retrieval of records [34 C.F.R. 300.617 and 99.11].

The District will provide copies of records:

- A. When the refusal to provide copies effectively denies access to the records by the parent or eligible student [34 C.F.R. 300.617].
- B. At the request of the parent or eligible student, when the District has provided the records to third parties by the prior consent of the parent or eligible student.
- C. At the request of the parent or eligible student when the District has forwarded the records to another school where the student seeks or intends to enroll.

### **Directory Information**

#### **Personally Identifiable Information**

The District designates the following personally identifiable information contained in a student's education records as "directory information" and may disclose that information without prior written consent [20 U.S.C. 1232g(a)(5)(A)]:

- A. The student's name.
- B. The student's address.
- C. The student's telephone listing.
- D. The student's date and place of birth.
- E. The student's electronic mail address.
- F. The student's photograph.

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- G. The student's grade level.
- H. The student's major field of study.
- I. The student's dates of attendance.
- J. The student's enrollment status (e.g., part time or full time).
- K. The student's participation in officially recognized activities and sports.
- L. The student's weight and height if a member of an athletic team.
- M. The student's honors and awards received.
- N. The student's most recently attended educational agency or institution.

Within the first three (3) weeks of each school year the District will publish in a District communication or send home with each student the above list, or a revised list, of the items of directory information designated as directory information. For a student who enrolls after the notice is published, the list will be given to the parent or eligible student at the time and place of enrollment. See Exhibit JR-EB.

After the parents or eligible student have been notified, they will have two (2) weeks to advise the District in writing (a letter to the Superintendent's office) of any or all of the items they refuse to permit the District to designate as directory information about that student.

According to state and federal law if the Governing Board permits the release of directory information relating to students to persons or organizations who inform students of educational or occupational opportunities, then the Governing Board shall provide access to directory information on the same basis to military official recruiting representatives for the purpose of informing students of educational and occupational opportunities available to them.

**Refusal to Release Personally  
Identifiable Information**

Directory information shall be released on or before October 31 of each year unless the parent or eligible student requests in writing to the District (a letter to the Superintendent's office within two [2] weeks after notification) not to release directory information to any person or organization without prior signed and dated written consent. The District shall distribute a form, separate from any other form, designed and provided to districts by the Arizona Department of Education allowing ~~pupils~~ students to request that directory information not be released. If the District distributes materials to ~~pupils~~ students through electronic communication or on an internet website, the form may be distributed in the same manner.

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A person who is wrongfully denied access to directory information or access to school buildings, school grounds or other property may notify the Department of Education, which shall report the alleged violation to the United States Department of Education. If the parent or eligible student refuses to allow the release of directory information without prior signed and dated written consent, then the District will not provide military recruiters, upon request, directory information containing the student's name, addresses and telephone listings.

**Permission to Release Personally Identifiable Information**

At the end of the two (2)-week period, if the parent or eligible student has not returned the form indicating refusal to allow the release of directory information, the District will assume it has their permission to release the above-mentioned information. The Governing Board shall provide the student with a transcript release form that allows the student to designate in separate check boxes whether the transcript is to be released to postsecondary institutions, the militia of this state or the armed services of the United States, or to any combination of these entities.

This designation will remain in effect until it is modified by the prior signed and dated written direction of the parent or eligible student. The student's records will be appropriately marked by the records custodian to ensure compliance with the parents' or eligible student's request.

**Use of Student Education Records**

To carry out their responsibilities, school officials will have access to student education records for legitimate educational purposes. The District will use the following criteria to determine who are school officials [34 C.F.R. 99.31]:

- A. A person duly elected to the Board (under limited circumstances).
- B. A person certificated by the state and appointed by the Board to an administrative or supervisory position.
- C. A person certificated by the state and under contract to the Board as an instructor.
- D. A person employed by the Board as a temporary substitute for administrative, supervisory, or instructional personnel for the period of such performance as a substitute.
- E. A person employed by or under contract to the Board to perform a special task, such as a secretary, a clerk, the Board attorney, or auditor, for the period of such performance as an employee or contractor.

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District officials who meet the criteria listed above will have access to a student's records if they have a legitimate educational interest in doing so [34 C.F.R. 99.32]. A "legitimate educational interest" is the person's need to know in order to:

- A. Perform an administrative task required in the school employee's position description approved by the Board.
- B. Perform a supervisory or instructional task directly related to the student's education.
- C. Perform a service or benefit for the student or the student's family, such as health care, counseling, student job placement, or student financial aid.

Records of students placed in special educational programs will be under the direct supervision of the program administration. All persons collecting or using personally identifiable information in records of students determined to be a student with a disability will receive training or instruction regarding Arizona's policies and procedures for the protection of these records at the collection, storage, disclosure, and destruction stages in accordance with FERPA and IDEA [34 C.F.R. 300.623].

The District will maintain for public inspection a current listing of the names and positions of employees who have access to personally identifiable information maintained on students placed in special education [34 C.F.R. 300.623]. When the information maintained in these records is no longer needed to provide educational services to the student, the District will notify the parents of their right to have the personally identifiable information destroyed [34 C.F.R. 300.624]. However, a permanent record of a student's name, address, phone number, grades, attendance record, classes attended, grade level completed, and year completed will be maintained [34 C.F.R. 300.624]. Destruction of records will be accomplished in accordance with the requirements of Arizona law and regulations of the Department of Library, Archives, and Public Records [34 C.F.R. 300.623].

The District will release information from or permit access to a student's education records only with a parent's or eligible student's prior signed and dated written consent, except that the Superintendent or a person designated in writing by the Superintendent may permit disclosure [34 C.F.R. 99.30, 99.31, 99.34, and 99.37]:

- A. When a student seeks or intends to enroll in another school district or a postsecondary school the District will not further notify parents or eligible students prior to such a transfer of records. Parents and student have a right to obtain copies of records transferred under this provision. See Exhibit JR-EC.

B. When certain federal and state officials need information in order to audit or enforce legal conditions related to federally supported education programs in the District.

C. To parties who provide or may provide financial aid to a student to:

1. Establish the student's eligibility for the aid.
2. Determine the amount of financial aid.
3. Establish the conditions for the receipt of the financial aid.
4. Enforce the agreement between the provider and the receiver of financial aid.

D. If a state law adopted before November 19, 1974, required certain specific items of information to be disclosed in personally identifiable form from student records to state or local officials.

E. If a state law adopted before November 19, 1974, required certain specific items of information to be disclosed in personally identifiable form from student records to state or local officials of the juvenile justice system and the officials certify in writing that the information will not be disclosed to any other party, except as provided under state law, without prior signed and dated written consent of the parent or the eligible student.

F. When the District has entered into a written agreement or contract for an organization to conduct studies on the District's behalf to develop tests, administer student aid, or improve instruction.

G. To accrediting organizations to carry out their accrediting functions.

H. To parents of an eligible student if the parents claim the student as a dependent as defined by the Internal Revenue Code of 1954.

I. To comply with a judicial order or lawfully issued subpoena. The District will make a reasonable effort to notify the parent or the eligible student before making a disclosure under this provision unless directed otherwise by a court of competent jurisdiction.

J. To comply with an *ex parte* order from a court of competent jurisdiction requiring the District to permit the U.S. Attorney General or U.S. Attorney General's designee to collect education records in the possession of the District that are relevant to an authorized investigation or prosecution of an offense listed in 18 U.S.C. 2332b(g)(5)(B) for an act of domestic or international terrorism as defined in 18 U.S.C. 2331. An *ex parte* order is an order issued by a court of competent jurisdiction without notice to the adverse party. A disclosure pursuant to an *ex parte* order will not be recorded as a disclosure of information from a student's education records by the District.

K. If the District initiates legal action against a parent or student, the District may disclose to the court, without a court order or subpoena, the education records of the student that are relevant for the District to proceed with the legal action.

L. If a parent or eligible student initiates legal action against the District, the District may, without a court order or subpoena, disclose the student's education records that are relevant for the District to defend itself.

M. To comply with the request of authorized law enforcement officials conducting an investigation of acts of terrorism.

N. The disclosure is in connection with a health or safety emergency. Time is an important and limiting factor in determining whether the disclosure is in connection with a health or safety emergency. The District will permit any school official to make the needed disclosure from student education records in a health or safety emergency if:

1. The official deems the disclosure is warranted by the seriousness of the threat to the health or safety of the student or other persons.
2. The information is necessary and needed to address the emergency.
3. The persons to whom the information is to be disclosed are qualified and in a position to deal with the emergency.

O. The District may release student attendance, disciplinary, and other education records to a law enforcement agency and county attorney pursuant to an intergovernmental agreement between the District, the law enforcement agency, the county attorney, and other state, local, or tribal government agencies to create a local or tribal juvenile justice network for the purpose of:

1. providing appropriate programs and services to intervene with juveniles currently involved in the juvenile justice system.
2. providing appropriate programs and services designed to deter at-risk juveniles from dropping out of school or other delinquent behavior.
3. increasing the safety and security of the community and its children by reducing juvenile crime.

P. Education records provided pursuant to an intergovernmental agreement entered into in accord with the above provisions shall be used solely for the purposes of the agreement and shall not be disclosed to any other party, except as provided by law.

A District school official may release information from a student's education records, other than directory information, to a third party if the parent or the eligible student gives prior signed and dated written consent for the disclosure and the third party agrees that the information will not be disclosed to any other party without the prior consent of the parent or eligible student. The signed and dated written consent must include at least:

- A. A specification of the records to be released.
- B. The reasons for the disclosure.
- C. The person or the organization or the class of persons or organizations to whom the disclosure is to be made.
- D. The signature of the parent or eligible student.
- E. The date of the consent and, if appropriate, a date when the consent is to be terminated.

The parent or the eligible student may obtain a copy of any records disclosed under this provision, unless otherwise provided.

### **Records of Requests for Access and Disclosures Made from Education Records**

The District will maintain an accurate record of all requests for it to disclose information from or to permit access to a student's education records, and of information it discloses and access it permits, with some exceptions as listed below. This record will be kept with, but will not be a part of, each student's cumulative school records. It will be available only to the record custodian, the eligible student, the parent of the student, or to federal, state, or local officials for the purpose of auditing or enforcing federally supported educational programs [34 C.F.R. 99.32]. See Exhibit JR-EE.

The record will include at least:

- A. The name of the person, organization or agency that made the request.
- B. The interest the person, organization or agency had in the information.
- C. The date the person, organization or agency made the request.
- D. Whether the request was granted and, if it was, the date access was permitted or the disclosure was made.

The District will maintain this record as long as it maintains the student's education records. The record will not include requests for access or access granted to:

- A. the parent or eligible student,
- B. authorized law enforcement officials conducting an investigation of acts of terrorism,
- C. school officials who have a legitimate educational interest in the student,
- D. requests for or disclosures of information contained in the student's education records if the request is accompanied by or authorized by the prior signed and dated written consent of the parent or eligible student, or
- E. for requests for or disclosures of directory information designated for that student.

**Procedures to Seek to Correct  
Education Records  
[34 C.F.R. 99.20 and 99.21]**

Parents of students and eligible students have a right to seek to change any part of the student's record they believe is inaccurate, misleading, or in violation of student rights [34 C.F.R. 300.618 and 99.20]. (*Note:* Under the FERPA, the District may decline to consider a request to change the grade a teacher assigns for a course.)

For the purpose of outlining the procedure to seek to correct education records, the term *incorrect* will be used to describe a record that is inaccurate, misleading, or in violation of student rights. The term *correct* will be used to describe a record that is accurate, not misleading, and not in violation of student rights. Also, in this section, the term *requester* will be used to describe the parent of a student or the eligible student who is asking the District to correct a record.

To establish an orderly process to review and correct education records for a requester, the District may make a decision to comply with the request for change at several levels in the procedure [34 C.F.R. 300.618 and 99.20].

***First-level decision.*** A parent of a student or an eligible student who finds an item in the student's education records that appears to be inaccurate, misleading, or in violation of student rights should immediately ask the record custodian to correct it. If the record is incorrect because of an obvious error and it is a simple matter to make the record change at this level, the record custodian will make the correction. However, if the record is changed at this level, the method and result must satisfy the requester.

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

If the custodian cannot change the record to the requester's satisfaction or the record does not appear to be obviously incorrect, the custodian will:

- A. Provide the requester a copy of the questioned record at no cost.
- B. Ask the requester to initiate a written request for the change.
- C. Follow the procedure for a second-level decision.

***Second-level decision.*** The written request to correct a student's education records through the procedure at this level should specify the correction the requester wishes the District to make. It should at least identify the item thought to be incorrect and state whether the requester believes the item:

- A. Is inaccurate and why,
- B. Is misleading and why, or
- C. Violates student rights and why.

The request will be dated and signed by the requester.

Within two (2) weeks after receiving a written request, the record custodian will study the request, discuss it with other school officials (the person who made the record or those who may have a professional concern about the District's response to the request), make a decision to comply or decline to comply with the request, and complete the appropriate steps to notify the requester or move the request to the next level for a decision.

If, as a result of this review and discussion, a decision is reached that the record should be corrected, the record custodian will affect the change and notify the requester, in writing, of that action. Each such notice will include an invitation for the requester to inspect and review the student's education records to make certain the record is in order and the correction is satisfactory.

If a decision is reached that the record is correct, the custodian will make a written summary of any discussions with other officials and of the findings in the matter. This summary and a copy of the written request will be transmitted to the Superintendent.

***Third-level decision.*** The Superintendent will review the material provided by the record custodian and, if necessary, discuss the matter with other officials such as the school attorney or the Board (in executive session unless otherwise requested by parent[s]). The Superintendent will then make a decision concerning the request and complete the steps at this decision level. Ordinarily, this level of the procedure should be completed within two (2) weeks. If it will take longer, the Superintendent will notify the requester in writing of the reasons for the delay and a date when the decision will be made.

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

If the Superintendent decides the record is incorrect and should be changed, the record custodian will be advised to make the changes. The record custodian will advise the requester of the change.

If the Superintendent decides the record is correct, a letter to the requester will be prepared that will include [34 C.F.R. 300.619 and 99.20]:

- A. The District's decision that the record is correct and the basis for the decision.
- B. A notice to the requester explaining the requester's right to ask for a hearing to present evidence that the record is incorrect and that the District will grant such a hearing.
- C. Instructions for the requester to contact the Superintendent to discuss acceptable hearing officers, convenient times, and a satisfactory site for the hearing. (The District will not be bound by the requester's positions on these items but will, as far as possible, arrange the hearing as the requester wishes.)
- D. Advice that the requester may be represented or assisted in the hearing by other parties, including an attorney, at the requester's expense.

***Fourth-level decision.*** After the requester has submitted (orally or in writing) any wishes concerning the hearing officer and the time and place for the hearing, the Superintendent will, within one (1) week, notify the requester when and where the District will hold the hearing and whom it has designated as the hearing officer [34 C.F.R. 300.621, 99.21, 99.22, and 99.34].

At the hearing, the hearing officer will provide the requester a full and reasonable opportunity to present material evidence and testimony to demonstrate that the questioned part of the student's education records is incorrect as shown in the requester's written request for a change in the record (second level).

Within one (1) week after the hearing, the hearing officer will submit to the Superintendent a written summary of the evidence submitted at the hearing. Along with the summary, the hearing officer will submit recommendations, based solely on the evidence presented at the hearing, that the record should be changed or should remain unchanged.

The Superintendent will prepare the District's decision within two (2) weeks after the hearing. That decision will be based on the summary of the evidence presented at the hearing and on the hearing officer's recommendation. However, the District's decision will be based solely on the evidence presented at the hearing. Therefore, the Superintendent may overrule the hearing officer if the hearing officer's recommendation is deemed inconsistent with the evidence presented. As a result of the District's decision, the Superintendent will take one (1) of the following actions:

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

A. If the decision is that the District will change the record, the Superintendent will instruct the record custodian to correct the record. The record custodian will correct the record and notify the requester at the second-level decision [34 C.F.R. 300.620 and 99.21].

B. If the decision is that the District will not change the record, the Superintendent will prepare a written notice to the requester that will include [34 C.F.R. 300.620 and 99.21]:

1. The District's decision that the record is correct and will not be changed.
2. A copy of a summary of the evidence presented at the hearing and a written statement of the reasons for the District's decision.
3. Advice to the requester that an explanatory statement may be placed in the student's education records stating the reasons for disagreement with the District's decision and/or the reasons for believing the record to be incorrect.

***Final administrative step in the procedure.*** When the District receives an explanatory statement from a requester after a hearing, it will maintain that statement as part of the student's education records as long as it maintains the questioned part of the record. The statement will be attached to the questioned part of the record and whenever the questioned part of the record is disclosed the explanatory statement will also be disclosed [34 C.F.R. 300.620 and 99.21].

**Annual Notification to Parents Regarding  
Confidentiality of Student Education  
Records [34 C.F.R. 300.612]**

Dear Parent:

The Family Educational Rights and Privacy Act (FERPA) affords parents and students over 18 years of age ("eligible students") certain rights with respect to the student's education records. The Governing Board has established written policies regarding the collection, storage, retrieval, release, use, and transfer of student educational information collected and maintained pertinent to the education of all students to ensure the confidentiality of the information and to guarantee parents' and students' rights to privacy. These policies and procedures are in compliance with:

The Family Education Rights and Privacy Act; Title 20, United States Code, Sections 1232g and 1232h; and the Federal Regulations (34 C.F.R., Part 99) issued pursuant to such act;

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

Uniting and Strengthening America by Providing Appropriate Tools Required to Intercept and Obstruct Terrorism Act of 2001 (USA PATRIOT ACT);

Every Student Succeeds Act of 2015 (ESSA);

The Individuals with Disabilities in Education Act; 20 U.S.C. Chapter 33; and the Federal Regulations (34 C.F.R. Part 300); and

Arizona Revised Statutes, Title 15, sections 141 and 142.

Student education records are collected and maintained to help in the instruction, guidance, and educational progress of the student, to provide information to parents and staff members, to provide a basis for the evaluation and improvement of school programs, and for legitimate educational research. The students' records maintained by the District may include - but are not necessarily limited to, identifying data, report cards and transcripts of academic work completed, standardized achievement test scores, attendance data, reports of psychological testing, health data, teacher or counselor observations, and verified reports of serious or recurrent behavior patterns.

These records are maintained in the office of the District under the supervision of the school administrator and are available only to the teachers and staff members working with the student. Upon request, the District discloses education records, including disciplinary records, without consent to officials of another school district in which a student seeks or intends to enroll. Otherwise, records are not released to most agencies, persons or organizations without prior signed and dated written consent of the parent [34 C.F.R. 99.7]. The signed and dated written consent may be in electronic form under certain conditions [34 C.F.R. 99.30].

You shall be informed when personally identifiable information collected, maintained, or used is no longer needed to provide educational services to your child. The information must be maintained for two (2) years after the date your child was last enrolled in this school district.

You have the right to inspect and review any and all records related to your child within forty-five (45) days of the day of receiving a request for access, including a listing of persons or organizations who have reviewed or have received copies of the information [34 C.F.R. 99.7]. Parents who wish to review their children's records should contact the principal for an appointment or submit to the principal a written request that identifies the record(s) you wish to inspect. District personnel will make arrangements for access and notify you of the time and place where the records may be inspected. District personnel will be available to explain the contents of the records to you. Copies of student education records will be made available to parents when it is not practicable for you to inspect and review the records at the school. Charges for the copies of records will be costs of copying unless the fee prevents the parent from exercising rights to inspect and review those records.

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

You have the right to request that an amendment be made to the student's education records and to add comments of your own if you believe information in the record file is inaccurate or misleading [34 C.F.R. 99.7(a)(1)]. You should write the principal, clearly identify the part of the record you want changed, and specify why it is inaccurate or misleading. If the District decides not to amend the record as requested by you, the District will notify you of the decision and advise you of the right to a hearing regarding the request for amendment. Additional information regarding the hearing procedures will be provided to you when notified of the right to a hearing.

You have the right to consent to disclosures of personally identifiable information contained in the student's education records, except to the extent that FERPA authorizes disclosure without consent. One exception, which permits disclosure without consent, is disclosure to school officials with legitimate educational interests. A school official is a person employed by the District as an administrator, supervisor, instructor, or support staff member (including health or medical staff and law enforcement unit personnel); a person serving on the School Board; a person or company with whom the District has contracted to perform a special task (such as an attorney, auditor, medical consultant, or therapist); or 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. A school official has a legitimate educational interest if the official needs to review an education record in order to fulfill his or her professional responsibility.

Copies of the District student education records confidentiality policies and procedures may be reviewed in the assigned office in each school [34 C.F.R. 99.7]. You have the right to file a complaint with the Family Educational Rights and Privacy Act Office in Washington, D.C., concerning alleged failures by the District to comply with the requirements of FERPA [34 C.F.R. 99.7]. The name and address of the Office that administers FERPA are:

**Family Policy Compliance Office  
U.S. Department of Education  
400 Maryland Avenue, SW  
Washington, DC 20202-4605**

**9.E. Adopt the Joseph City Schools FY 2025-26 Budget**

Adopt the Joseph City Unified School District budget as proposed at the June 10, 2025 board meeting.



**Fund 001 (M&O)**

**Maintenance and Operation (M&O) Fund**

| Expenditures   | FTE         |              | Salaries<br>6100 | Employee<br>Benefits<br>6200 | Purchased<br>Services<br>6300, 6400,<br>6500 | Supplies<br>6600 | Other<br>6800 | Totals              |                      | %<br>Increase/<br>Decrease |        |
|--|-------------|--------------|------------------|------------------------------|--|------------------|---------------|---------------------|----------------------|----------------------------|--------|
|  | Prior<br>FY | Budget<br>FY |                  |                              |  |                  |               | Prior<br>FY<br>2025 | Budget<br>FY<br>2026 |                            |        |
| 100 Regular Education  |             |              |                  |                              |  |                  |               |                     |                      |                            |        |
| 1000 Instruction   | 1.          | 25.18        | 20.76            | 722,371                      | 234,271                                      | 7,409            | 38,564        | 3,376               | 1,767,462            | 1,005,991                  | -43.1% |
| 2000 Support Services  |             |              |                  |                              |  |                  |               |                     |                      |                            |        |
| 2100 Students  | 2.          | 3.15         | 2.66             | 133,806                      | 47,722                                       | 14,921           | 2,853         | 2,094               | 293,750              | 201,396                    | -31.4% |
| 2200 Instructional Staff   | 3.          | 2.81         | 3.01             | 149,052                      | 51,722                                       | 37,950           | 2,559         | 3,556               | 230,754              | 244,839                    | 6.1%   |
| 2300 General Administration  | 4.          | 1.30         | 1.30             | 82,670                       | 54,651                                       | 25,305           | 41            | 7,099               | 98,548               | 169,766                    | 72.3%  |
| 2400 School Administration   | 5.          | 3.48         | 2.88             | 151,703                      | 43,108                                       | 0                | 7,583         | 819                 | 199,834              | 203,213                    | 1.7%   |
| 2500 Central Services  | 6.          | 4.90         | 3.80             | 178,775                      | 64,596                                       | 77,893           | 8,928         | 21,821              | 421,435              | 352,013                    | -16.5% |
| 2600 Operation & Maintenance of Plant  | 7.          | 11.98        | 13.93            | 298,733                      | 91,076                                       | 465,775          | 297,765       | 1,614               | 1,141,254            | 1,154,963                  | 1.2%   |
| 2900 Other   | 8.          | 0.00         | 0.00             | 0                            | 0  | 0                | 0             | 0                   | 0                    | 0                          | 0.0%   |
| 3000 Operation of Noninstructional Services                                      | 9.          | 0.19         | 0.15             | 7,516                        | 1,364  | 0                | 22            | 0                   | 10,500               | 8,902                      | -15.2% |
| 610 School-Sponsored Cocurricular Activities                                     | 10.         | 0.00         | 0.00             | 27,627                       | 4,516  | 0                | 180           | 9,545               | 29,910               | 41,868                     | 40.0%  |
| 620 School-Sponsored Athletics   | 11.         | 0.00         | 0.60             | 139,700                      | 16,811                                       | 17,016           | 18,024        | 34,852              | 145,962              | 226,403                    | 55.1%  |
| 630 Other Instructional Programs   | 12.         | 0.00         | 0.00             | 0                            | 0  | 0                | 0             | 0                   | 0                    | 0                          | 0.0%   |
| 700, 800, 900 Other Programs   | 13.         | 0.00         | 0.00             | 19,612                       | 656  | 0                | 0             | 0                   | 21,151               | 20,268                     | -4.2%  |
| Regular Education Subsection Subtotal (lines 1-13)                               | 14.         | 52.99        | 49.09            | 1,911,565                    | 610,493                                      | 646,269          | 376,519       | 84,776              | 4,360,560            | 3,629,622                  | -16.8% |
| 200 and 300 Special Education  |             |              |                  |                              |  |                  |               |                     |                      |                            |        |
| 1000 Instruction   | 15.         | 18.47        | 14.09            | 386,660                      | 56,847                                       | 0                | 1,316         | 0                   | 360,424              | 444,823                    | 23.4%  |
| 2000 Support Services  |             |              |                  |                              |  |                  |               |                     |                      |                            |        |
| 2100 Students  | 16.         | 2.07         | 1.70             | 105,873                      | 15,165                                       | 154,768          | 811           | 0                   | 276,617              | 276,617                    | 0.0%   |
| 2200 Instructional Staff   | 17.         | 0.50         | 0.50             | 24,617                       | 813  | 785              | 1,190         | 97                  | 27,502               | 27,502                     | 0.0%   |
| 2300 General Administration  | 18.         | 0.00         | 0.00             | 0                            | 0  | 0                | 0             | 0                   | 0                    | 0                          | 0.0%   |
| 2400 School Administration   | 19.         | 0.00         | 0.00             | 0                            | 0  | 0                | 0             | 0                   | 0                    | 0                          | 0.0%   |
| 2500 Central Services  | 20.         | 0.00         | 0.00             | 0                            | 0  | 1,058            | 0             | 0                   | 1,058                | 1,058                      | 0.0%   |
| 2600 Operation & Maintenance of Plant  | 21.         | 0.00         | 0.00             | 0                            | 0  | 0                | 0             | 0                   | 0                    | 0                          | 0.0%   |
| 2900 Other   | 22.         | 0.00         | 0.00             | 0                            | 0  | 0                | 0             | 0                   | 0                    | 0                          | 0.0%   |
| 3000 Operation of Noninstructional Services                                      | 23.         | 0.00         | 0.00             | 0                            | 0  | 0                | 0             | 0                   | 0                    | 0                          | 0.0%   |
| Subtotal (lines 15-23)   | 24.         | 21.04        | 16.29            | 517,150                      | 72,825                                       | 156,611          | 3,317         | 97                  | 665,601              | 750,000                    | 12.7%  |
| 400 Pupil Transportation   | 25.         | 0.00         | 9.65             | 185,237                      | 42,383                                       | 102,106          | 95,875        | 0                   | 321,486              | 425,601                    | 32.4%  |
| 510 Desegregation (from Districtwide Desegregation Budget, page 2, line 44)      | 26.         | 0.00         | 0.00             | 0                            | 0  | 0                | 0             | 0                   | 0                    | 0                          | 0.0%   |
| 530 Dropout Prevention Programs  | 27.         | 0.00         | 0.00             | 0                            | 0  | 0                | 0             | 0                   | 0                    | 0                          | 0.0%   |
| 540 Joint Career and Technical Education and Vocational Education Center         | 28.         | 0.00         | 0.00             | 0                            | 0  | 0                | 0             | 0                   | 0                    | 0                          | 0.0%   |
| 550 K-3 Reading Program  | 29.         | 0.00         | 0.00             | 14,854                       | 3,714  |                  |               |                     | 18,387               | 18,568                     | 1.0%   |
| Budgeted expenditures (lines 14, and 24-29)                                      | 30.         | 74.03        | 75.03            | 2,628,806                    | 729,415                                      | 904,986          | 475,711       | 84,873              | 5,366,034            | 4,823,791                  | -10.1% |
| Maintained for spending after FY 2026 (budgeted carry forward)                   | 31.         |              |                  |                              |  |                  |               |                     |                      | 58,842                     |        |
| Total budget limit expenditures (lines 30-31)<br>(Cannot exceed page 7, line 10) | 32.         | 74.03        | 75.03            | 2,628,806                    | 729,415                                      | 904,986          | 475,711       | 84,873              | 5,366,034            | 4,882,633                  | -9.0%  |

The district has budgeted an amount in the M&O Fund equal to the General Budget Limit as calculated on page 7 of 8.

**Special education programs by type (M&O Fund Programs 200 and 300)**

(A.R.S. §§ 15-761 and 15-903)

|  | Prior FY | Budget FY |     |
|--|----------|-----------|-----|
| 1. Total all disability classifications                              | 570,752  | 655,151   | 1.  |
| 2. Gifted Education  | 0        | 0         | 2.  |
| 3. Remedial Education  | 0        | 0         | 3.  |
| 4. ELL Incremental Costs   | 0        | 0         | 4.  |
| 5. ELL Compensatory Instruction                                      | 0        | 0         | 5.  |
| 6. Vocational and Technical Education (non-CTED)                     | 0        | 0         | 6.  |
| 7. Career Education (non-CTED)                                       | 0        | 0         | 7.  |
| 8. Career Technical Education (CTED)                                 | 94,849   | 94,849    | 8.  |
| 9. Total (lines 1 through 8. Must equal total of line 24, page 1)    | 665,601  | 750,000   | 9.  |
| 10. IEP required pupil transportation costs coded within Program 400 | 0        | 0         | 10. |

**Proposed ratios for special education**

(A.R.S. §§15-903.E.1 and 15-764.A.5)

Teacher-Pupil 1 to 22  
 Staff-Pupil 1 to 17

**Expenditures budgeted for audit services**

|                       |      |        |
|-----------------------|------|--------|
| M&O Fund - Nonfederal | 6350 | 26,500 |
| All Funds - Federal   | 6330 | 0      |

**FY 2026 Performance Pay (A.R.S. Section 15-920)**

Amount Budgeted in M&O Fund for a Performance Pay Component \$ -

Do not report budgeted amounts for the Performance Pay Component of the Classroom Site Fund on this line.

**Expenditures budgeted in the M&O Fund for food service**

Amount budgeted in M&O for Food Service (Fund 001, Function 3100) \$ 8,902  
 (This amount will be used to determine district compliance with state matching requirements pursuant to Code of Federal Regulations (CFR) Title 7, §210.17(a)]

**Fund 010 (CSF)**

**Classroom Site Fund (CSF) and CSF Budget Limit (A.R.S. §§ 15-977 and 15-978)**

| Expenditures  |     | Salaries<br>6100 | Employee benefits<br>6200 | Purchased services<br>6300, 6400, 6500 | Supplies<br>6600 | Property<br>6700 | Debt service<br>and miscellaneous<br>6800 | Totals           |                   | % Increase/<br>Decrease |
|---|-----|------------------|---------------------------|--|------------------|------------------|---|------------------|-------------------|-------------------------|
|   |     |                  |                           |  |                  |                  |   | Prior FY<br>2025 | Budget FY<br>2026 |                         |
| 1000 Instruction  | 1.  | 568,606          | 98,225                    |  |                  |                  |   | 1,149,324        | 666,831           | -42.0%                  |
| 2100 Support services - students                              | 2.  | 74,830           | 14,470                    | 50,035                                 |                  |                  |   | 228,730          | 139,335           | -39.1%                  |
| 2200 Support services - instructional staff                   | 3.  |                  |                           | 8,008                                  |                  |                  |   | 0                | 8,008             |                         |
| 2300 Support services - general administration                | 4.  |                  |                           |  |                  |                  |   | 0                | 0                 | 0.0%                    |
| 2500 Central services   | 5.  |                  |                           |  |                  |                  |   | 0                | 0                 | 0.0%                    |
| 3300 Community services Ooerations                            | 6.  |                  |                           |  |                  |                  |   | 0                | 0                 | 0.0%                    |
| 4000 Facilities acquisition and construction                  | 7.  |                  |                           |  |                  |                  |   | 0                | 0                 |                         |
| 5000 Debt service   | 8.  |                  |                           |  |                  |                  |   | 0                | 0                 |                         |
| Budgeted expenditures (lines 1-8)                             | 9.  | 643,436          | 112,695                   | 58,043                                 | 0                | 0                | 0   | 1,378,054        | 814,174           | -40.9%                  |
| Maintained for spending after FY 2026 (budgeted carryforward) | 10. |                  |                           |  |                  |                  |   |                  | 487,877           |                         |
| Total budget limit expenditures (lines 10-11)                 | 11. | 643,436          | 112,695                   | 58,043                                 | 0                | 0                | 0   | 1,378,054        | 1,302,051         | -5.5%                   |

The district has budgeted an amount in Fund 010 equal to the Classroom Site Fund Budget Limit as calculated below.

**Classroom Site Fund Budget Limit Calculation**

|  |     |           |
|--|-----|-----------|
| FY 2025 Classroom Site Fund Budget Limit (from FY 2025 latest revised Budget, page 3, line 16)   | 12. | 1,378,054 |
| FY 2025 Actual expenditures (For budget adoption use actual expenditures to date plus estimated expenditures through fiscal year-end.) | 13. | 540,096   |
| Unexpended Budget Balance (line 12 minus 13)   | 14. | 837,958   |
| Interest earned in the Classroom Site Fund in FY 2025  | 15. | 0         |
| FY 2026 Classroom Site Fund allocation, provided by ADE based on: #####  | 16. | 464,093   |
| Adjustments to FY 2026 Classroom Site Fund Budget Limit (1)  | 17. |           |
| FY 2026 Classroom Site Fund Budget Limit (Sum of lines 12 through 17)<br>(2)   | 18. | 1,302,051 |

(1) This line may be used to recapture lost CSF budget capacity that resulted from underbudgeting in prior fiscal years.

(2) The amounts budgeted on line 11 cannot exceed the respective amounts on this line.

**Fund 610 (UCO)**

**Unrestricted Capital Outlay (UCO) Fund**

| Expenditures   | Rentals<br>6440 | Library books,<br>textbooks,<br>& instructional<br>aids (2)<br>6641-6643 | Short-term<br>noninstructional<br>software<br>subscription<br>6655 | Property (2)<br>6700 | Redemption of<br>principal (3)<br>6831, 6832, 6833 | Interest (4)<br>6841, 6842, 6843,<br>6850 | All other<br>object codes<br>(excluding 6900) | Totals              |                      | % Increase/<br>Decrease |
|--|-----------------|--|--|----------------------|--|---|---|---------------------|----------------------|-------------------------|
|  |                 |  |  |                      |  |   |   | Prior<br>FY<br>2025 | Budget<br>FY<br>2026 |                         |
| <b>Unrestricted Capital Outlay Override (1)</b>                                  | 0               | 0  | 0  | 0                    | 0  | 0   | 0   | 0                   | 0                    | 0.0%                    |
| <b>Unrestricted Capital Outlay Fund 610 (6)</b>                                  |                 |  |  |                      |  |   |   |                     |                      |                         |
| 1000 Instruction   |                 | 75,216   |  | 30,421               |  |   |   | 112,138             | 105,637              | -5.8%                   |
| 2000 Support Services  |                 |  |  |                      |  |   |   |                     |                      |                         |
| 2100, 2200 Students and Instructional Staff                                      |                 | 12,811   | 37,441   | 30,803               |  |   |   | 45,280              | 81,055               | 79.0%                   |
| 2300, 2400, 2500, 2900 Administration  |                 |  | 68,827   | 23,706               |  |   |   | 74,335              | 92,533               | 24.5%                   |
| 2600 Operation & Maintenance of Plant  |                 |  |  | 4,329                |  |   |   | 1,253               | 4,329                | 245.5%                  |
| 2700 Student Transportation  |                 |  |  | 138                  |  |   |   | 3,718               | 138                  | -96.3%                  |
| 3000 Operation of Noninstructional Services (5)                                  |                 |  |  |                      |  |   |   | 0                   | 0                    | 0.0%                    |
| 4000 Facilities Acquisition and Construction                                     |                 |  |  |                      |  |   |   | 0                   | 0                    | 0.0%                    |
| 5000 Debt Service  |                 |  |  |                      | 16,508   | 66  |   | 80,830              | 16,574               | -79.5%                  |
| Budgeted expenditures (lines 2-9)  | 0               | 88,027   | 106,268  | 89,397               | 16,508   | 66  | 0   | 317,554             | 300,266              | -5.4%                   |
| Maintained for spending after FY 2026 (budgeted carryforward)                    |                 |  |  |                      |  |   |   |                     | 0                    |                         |
| Total budget limit expenditures (lines 10-11)<br>(Cannot exceed page 8, line 12) | 0               | 88,027   | 106,268  | 89,397               | 16,508   | 66  | 0   | 317,554             | 300,266              | -5.4%                   |

The district has budgeted an amount in the UCO Fund equal to the Unrestricted Capital Budget Limit as calculated on Page 8 of 8.

(1) Amounts in the Unrestricted Capital Outlay Override line 1 above must be included in the appropriate individual line items for Fund 610 and in the budget year total column.

(5) Expenditures budgeted in Unrestricted Capital Outlay (UCO) Fund for food service

Enter the amount budgeted in UCO for food service [amount will be used to determine district compliance with state matching requirements pursuant to CFR Title 7, §210.17(a)]

(2) Detail by object code:

Unrestricted Capital  
Outlay

|                               |           |
|-------------------------------|-----------|
| 6641 Library Books            | \$ 15,000 |
| 6642 Textbooks                | 35,000    |
| 6643 Instructional Aids       | 38,027    |
| 673X Furniture and Equipment  | 30,000    |
| 673X Vehicles                 | 10,000    |
| 673X Tech Hardware & Software | 49,397    |

(6) Expenditures, if any, budgeted in the Unrestricted Capital Outlay Fund on lines 2-9 for the K-3 Reading Program as described in A.R.S. 815-211

(3) Includes principal on Capital Equity Fund loans of \_\_\_\_\_, principal on leases of \_\_\_\_\_, and principal on bonds of \_\_\_\_\_.

(4) Includes interest on Capital Equity Fund loans of \_\_\_\_\_, interest on leases of \_\_\_\_\_, and interest on bonds of \_\_\_\_\_.

Other funds—required capital expenditure detail [(A.R.S. §15-904.(B)]

| Expenditures  | Unrestricted Capital Outlay |           | Bond Building |           | New School Facilities |           | Adjacent Ways |           |         |     |
|---|-----------------------------|-----------|---------------|-----------|-----------------------|-----------|---------------|-----------|---------|-----|
|   | Fund 610                    |           | Fund 630      |           | Fund 695              |           | Fund 620 (2)  |           |         |     |
|   | Prior FY                    | Budget FY | Prior FY      | Budget FY | Prior FY              | Budget FY | Prior FY      | Budget FY |         |     |
| <b>Total Fund Expenditures</b>                                | 1.                          | 317,554   | 300,266       | 0         |                       | 0         |               | 196,084   | 175,000 | 1.  |
| <b>Select Object Codes Detail (1)</b>                         |                             |           |               |           |                       |           |               |           |         |     |
| 6150 Classified Salaries                                      | 2.                          | 0         |               | 0         |                       | 0         |               | 0         | 0       | 2.  |
| 6200 Employee Benefits  | 3.                          | 0         |               | 0         |                       | 0         |               | 0         | 0       | 3.  |
| 6450 Construction Services                                    | 4.                          | 0         |               | 0         |                       | 0         |               | 196,084   | 175,000 | 4.  |
| 6655 Short-term Noninstructional Software Subscription        | 5.                          |           |               |           |                       |           |               |           | 0       | 5.  |
| 6710 Land and Improvements                                    | 6.                          | 0         |               | 0         |                       | 0         |               | 0         | 0       | 6.  |
| 6720 Buildings and Improvements                               | 7.                          | 0         |               | 0         |                       | 0         |               | 0         | 0       | 7.  |
| 673X Furniture and Equipment                                  | 8.                          | 70,000    | 30,000        | 0         |                       | 0         |               | 0         | 0       | 8.  |
| 673X Vehicles   | 9.                          | 50,000    | 10,000        | 0         |                       | 0         |               | 0         | 0       | 9.  |
| 673X Technology Hardware & Software                           | 10.                         | (60,903)  | 49,397        | 0         |                       | 0         |               | 0         | 0       | 10. |
| 6831, 6832, 6833 Redemption of Principal                      | 11.                         | 0         |               | 0         |                       | 0         |               | 0         | 0       | 11. |
| 6841, 6842, 6843, 6850, 6860 Interest and Debt-Issuance Costs | 12.                         | 0         |               | 0         |                       | 0         |               | 0         | 0       | 12. |
| Total (lines 2-12)  | 13.                         | 59,097    | 89,397        | 0         | 0                     | 0         | 0             | 196,084   | 175,000 | 13. |
| Total amounts reported on lines 2-12 above for:               |                             |           |               |           |                       |           |               |           |         |     |
| Renovation  | 14.                         | 0         | 0             | 0         |                       |           |               | 0         | 0       | 14. |
| New Construction  | 15.                         | 0         | 0             | 0         |                       | 0         |               | 0         | 0       | 15. |
| Other   | 16.                         | 59,097    | 89,397        | 0         |                       | 0         |               | 196,084   | 175,000 | 16. |
| Total (lines 14-16, must equal line 13)                       | 17.                         | 59,097    | 89,397        | 0         | 0                     | 0         | 0             | 196,084   | 175,000 | 17. |

(1) Lines 2-12 may not include all budgeted expenditures of the fund. Total budgeted expenditures for each fund should be included on Line 1.

(2) Amount budgeted on line 1 for the Adjacent Ways Fund that will result in a tax levy in FY 2026 \$ -



District name Joseph City Unified School Distri County Navajo County

CTD number 090202000

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**Calculation of FY 2026 General Budget Limit  
(A.R.S. §15-947.C)**

|  |              | <u>A.<br/>Maintenance<br/>and Operation</u> | <u>B.<br/>Unrestricted<br/>Capital Outlay</u> |
|--|--------------|---|---|
| *1. FY 2026 Revenue Control Limit (RCL)<br>(from BSA55 tab, page 3; includes FRPL and DAA onetime supplies)  | \$ 4,355,084 | \$ 4,355,084                                | \$ 0  |
| *2. (a) FY 2026 District Additional Assistance (DAA) (from BSA55 tab, page 4)  | \$ 274,992   |   |   |
| (b) DAA Adjustment (from BSA55 tab, page 4)  | \$ 0         |   |   |
| (c) Total DAA (line 2.a plus 2.b)  | \$ 274,992   |   | 274,992                                       |
| *3. FY 2026 Override Authorization (A.R.S. Sections 15-481 and 15-482 or 15-949 if small school adjustment phase down applies, see Calculations page, Calculation of Maximum Override for a District No Longer Eligible for a Small School Adjustment, line 6 and Calculation of Small School Adjustment Phase Down Limit, line 6) |              |   |   |
| (a) Maintenance and Operation  |              | 560,457                                     |   |
| (b) Unrestricted Capital Outlay  |              |   |   |
| (c) Special Program  |              |   |   |
| *4. Small School Adjustment for Districts with a Student Count of 125 or less in K-8 or 100 or less in 9-12 (A.R.S. §15-949) (Up to \$50,000 if no election is chosen for phase down, see Calculations page, Calculation of Small School Adjustment Phase Down Limit, line 6)  |              |   |   |
| *5. Tuition Revenue (A.R.S. §§15-823 and 15-824)<br>(Do <b>not</b> include full-day kindergarten or summer school tuition)   |              |   |   |
| (a) Individuals and Other Private Sources  |              |   |   |
| (b) Other Arizona Districts  |              |   |   |
| (c) Out-of-State Districts and Other Governments   |              |   |   |
| (d) Certificates of Educational Convenience (A.R.S. §§15-825, 15-825.01, and 15-825.02)  |              |   |   |
| *6. State Assistance (A.R.S. §15-976) and Special Ed. Voucher Payments Received (A.R.S. §15-1204)  |              |   |   |
| *7. Increase Authorized by County School Superintendent for Accommodation Schools<br>[not to exceed amount on Calculations page, Calculation of M&O Fund Budget Balance Carryforward, line 15(e)] (A.R.S. §15-974.B)   |              |   |   |
| 8. Budget Increase for:  |              |   |   |
| (a) Desegregation Expenditures (A.R.S. §15-910.G-K)  |              |   |   |
| * Budget Balance Carryforward (from Calculations page, Calculation of M&O Fund Budget Balance Carryforward, line 13) (A.R.S. §15-943.01)   |              | 58,842                                      |   |
| (c) Dropout Prevention Programs (Laws 1992, Ch. 305, §32 and Laws 2000, Ch. 398, §2)   |              |   |   |
| (d) Registered Warrant or Tax Anticipation Note Interest Expense Incurred in FY 2024 (A.R.S. Section 15-910.M, as amended by Laws 2022, Ch. 285, §3)   |              |   |   |
| * (e) Joint Career and Technical Education and Vocational Education Center (A.R.S. §15-910.01)   |              |   |   |
| * (f) FY 2025 Performance Pay Unexpended Budget Carryforward (from Calculation page, Calculation of M&O Fund Budget Balance Carryforward, line 10.e) (A.R.S. §15-920)  |              | 0   |   |
| (g) Excessive Property Tax Assessed Valuation Judgments (A.R.S. §§42-16213 and 42-16214)   |              |   |   |
| * (h) Transportation Revenues for Attendance of Nonresident Pupils (A.R.S. §§15-923 and 15-947)  |              |   |   |
| *9. Adjustment to the General Budget Limit (A.R.S. §§15-272, 15-905.M, 15-910.02, and 15-915)<br>Include year(s) and descriptions, as applicable.  |              |   |   |
| (a) Prior Year Over Expenditures/Resolutions:  |              |   |   |
| (b) Decrease for Transfer from M&O to Energy and Water Savings Fund  |              | (91,750)                                    |   |
| (c) Increase for Energy and Water Savings Fund Transfer to M&O   |              |   |   |
| (d) Noncompliance Adjustment   |              |   |   |
| (e) ADM/Transportation Audit Adjustment  |              |   |   |
| (f) Other:   |              |   |   |
| 10. FY 2026 General Budget Limit (column A, lines 1 through 9)<br>(A.R.S. §15-905.F) (page 1, line 30 cannot exceed this amount)   |              | \$ 4,882,633                                |   |
| 11. Total Amount to be Used for Capital Expenditures (column B, lines 1 through 8)<br>(A.R.S. §15-905.F) (to page 8, line 11)  |              |   | \$ 274,992                                    |

204  
\* Subject to adjustment prior to May 15 as allowed by A.R.S. Revisions are described in the instructions for these lines, as needed.

District name

Joseph City Unified School District

County

Navajo County

CTD number

090202000

Version

Adopted

**Calculation of FY 2026 Unrestricted Capital Budget Limit  
(A.R.S. Section 15-947.D)**

**Unrestricted Capital Budget Limit**

|  |                          |
|--|--------------------------|
| 1. FY 2025 Unrestricted Capital Budget Limit (UCBL)<br>(from FY 2025 latest revised Budget, page 8, line 12)   | \$ <u>317,554</u>        |
| 2. Total UCBL Adjustment for prior years as notified by ADE on BUDG75 report (For budget adoption, use zero.)  | \$ <u>0</u>              |
| 3. Adjusted Amount Available for FY 2025 Capital Expenditures (line 1 + 2)   | \$ <u>317,554</u>        |
| 4. Amount Budgeted in Fund 610 in FY 2025<br>(from FY 2025 latest revised Budget, page 4, line 10)   | \$ <u>317,554</u>        |
| 5. Lesser of line 3 or the sum of line 4 and any positive adjustment on line 2   | \$ <u>317,554</u>        |
| 6. FY 2025 Fund 610 Actual Expenditures (For budget adoption use actual expenditures to date plus estimated expenditures through fiscal year-end.)             | \$ <u>292,280</u>        |
| 7. Unexpended Budget Balance in Fund 610 (line 5 minus 6) If negative, use zero in calculation, but show negative amount here in parentheses.                  | \$ <u>25,274</u>         |
| 8. Interest Earned in Fund 610 in FY 2025  | \$ <u>0</u>              |
| 9. Monies deposited in Fund 610 from Division of School Facilities for donated land (A.R.S. §41-5741.F)  | \$ <u>          </u>     |
| 10. Adjustment to UCBL for FY 2026 (A.R.S. Section 15-905.M) Include year(s) and descriptions, as applicable.<br>(a) Prior Year Over Expenditures/Resolutions: | \$ <u>          </u>     |
| (b) ADM/Transportation Audit Adjustment  | \$ <u>          </u>     |
| (c) Other:   | \$ <u>          </u>     |
| 11. Amount to be used for capital expenditures (from page 7, line 11)  | \$ <u>274,992</u>        |
| 12. FY 2026 Unrestricted Capital Budget Limit (lines 7 through 11) (1)   | \$ <u><u>300,266</u></u> |

(1) The amount budgeted on page 4, line 10 cannot exceed this amount.

**Supplement to school district annual expenditure budget for districts that budget for English language learners  
(A.R.S. §§15-756.04 and 15-756.11)**

| English Language Learners Supplement                                    | FTE         |              | Salaries<br>6100 | Employee<br>benefits<br>6200 | Purchased<br>services<br>6300, 6400,<br>6500 | Supplies<br>6600 | Property<br>6700 | Other<br>6800 | Totals              |                      | %<br>Increase/<br>Decrease |
|---|-------------|--------------|------------------|------------------------------|--|------------------|------------------|---------------|---------------------|----------------------|----------------------------|
|   | Prior<br>FY | Budget<br>FY |                  |                              |  |                  |                  |               | Prior<br>FY<br>2025 | Budget<br>FY<br>2026 |                            |
| <b>Expenditures</b>   |             |              |                  |                              |  |                  |                  |               |                     |                      |                            |
| <b>English Language Learner Fund 071 (A.R.S. §15-756.04)</b>            |             |              |                  |                              |  |                  |                  |               |                     |                      |                            |
| 1000 Instruction 1.   | 0.00        |              |                  |                              |  |                  |                  |               | 0                   | 0                    | 0.0%                       |
| 2000 Support Services   |             |              |                  |                              |  |                  |                  |               |                     |                      |                            |
| 2100 Students 2.  | 0.00        |              |                  |                              |  |                  |                  |               | 0                   | 0                    | 0.0%                       |
| 2200 Instructional Staff 3.   | 0.00        |              |                  |                              |  |                  |                  |               | 0                   | 0                    | 0.0%                       |
| 2300 General Administration 4.  | 0.00        |              |                  |                              |  |                  |                  |               | 0                   | 0                    | 0.0%                       |
| 2400 School Administration 5.   | 0.00        |              |                  |                              |  |                  |                  |               | 0                   | 0                    | 0.0%                       |
| 2500 Central Services 6.  | 0.00        |              |                  |                              |  |                  |                  |               | 0                   | 0                    | 0.0%                       |
| 2600 Operation & Maintenance of Plant 7.                                | 0.00        |              |                  |                              |  |                  |                  |               | 0                   | 0                    | 0.0%                       |
| 2700 Student Transportation 8.  | 0.00        |              |                  |                              |  |                  |                  |               | 0                   | 0                    | 0.0%                       |
| 2900 Other 9.   | 0.00        |              |                  |                              |  |                  |                  |               | 0                   | 0                    | 0.0%                       |
| <b>Total (lines 1-9) (to Budget, page 6, Other Funds, line 2)</b> 10.   | 0.00        | 0.00         | 0                | 0                            | 0  | 0                |                  | 0             | 0                   | 0                    | 0.0%                       |
| <b>Compensatory Instruction Fund 072 (A.R.S. §15-756.11)</b>            |             |              |                  |                              |  |                  |                  |               |                     |                      |                            |
| 1000 Instruction 11.  | 0.00        |              |                  |                              |  |                  |                  |               | 0                   | 0                    | 0.0%                       |
| 2000 Support Services   |             |              |                  |                              |  |                  |                  |               |                     |                      |                            |
| 2100 Students 12.   | 0.00        |              |                  |                              |  |                  |                  |               | 0                   | 0                    | 0.0%                       |
| 2200 Instructional Staff 13.  | 0.00        |              |                  |                              |  |                  |                  |               | 0                   | 0                    | 0.0%                       |
| 2300 General Administration 14.   | 0.00        |              |                  |                              |  |                  |                  |               | 0                   | 0                    | 0.0%                       |
| 2400 School Administration 15.  | 0.00        |              |                  |                              |  |                  |                  |               | 0                   | 0                    | 0.0%                       |
| 2500 Central Services 16.   | 0.00        |              |                  |                              |  |                  |                  |               | 0                   | 0                    | 0.0%                       |
| 2600 Operation & Maintenance of Plant 17.                               | 0.00        |              |                  |                              |  |                  |                  |               | 0                   | 0                    | 0.0%                       |
| 2700 Student Transportation 18.   | 0.00        |              |                  |                              |  |                  |                  |               | 0                   | 0                    | 0.0%                       |
| 2900 Other 19.  | 0.00        |              |                  |                              |  |                  |                  |               | 0                   | 0                    | 0.0%                       |
| <b>Total (lines 11-19) (to Budget, page 6, Other Funds, line 3)</b> 20. | 0.00        | 0.00         | 0                | 0                            | 0  | 0                |                  | 0             | 0                   | 0                    | 0.0%                       |

Summary of School District Adopted Expenditure Budget

CTD number 090202000  
Version Adopted

I certify that the budget of  
adopted by the Governing Board on,  
Steven Mills

Joseph City Unified School District,  
Navajo County for fiscal year 2026 was officially  
July 8, 2025, and that the complete Adopted Expenditure Budget may be reviewed by contacting  
at the District Office, telephone 928-288-3307 during normal business hours.

President of the Governing Board

|  |              |              |                |   |        |
|--|--------------|--------------|----------------|---|--------|
| <b>1. Average Daily Membership:</b>  |              | Prior year   | Budget year    | <b>4. Average teacher salaries (A.R.S. §15-903.E)</b>               |        |
|  | 2024 ADM     | 2025 ADM     | 2026 ADM       | 1. Average salary of all teachers employed in FY 2026 (budget year) | 60,634 |
| Attending  | 407,3003     | 389,6089     | 371,0000       | 2. Average salary of all teachers employed in FY 2025 (prior year)  | 59,445 |
|  |              |              |                | 3. Increase in average teacher salary from the prior year           | 1,189  |
|  |              |              |                | 4. Percentage increase  | 2%     |
| <b>2. Tax Rates:</b>   |              | Prior FY     | Est. Budget FY | Comments on average salary calculation (Optional):                  |        |
| Primary rate (equalization formula funding and budget add-ons not required to be in secondary rate)                          |              | 4.3101       | 4.7814         |   |        |
| Secondary rate (voter-approved overrides, bonds, and Career Technical Education Districts, and desegregation, if applicable) |              | 0.7392       | 0.5803         |   |        |
| <b>3. Budgeted expenditures and Budget Limits:</b>   |              | Budgeted     | Budgeted       |   |        |
|  | Expenditures | Carryforward | Budget Limit   |   |        |
| Maintenance & Operation Fund   | 4,823,791    | 58,842       | 4,882,633      |   |        |
| Classroom Site Fund  | 814,174      | 487,877      | 1,302,051      |   |        |
| Unrestricted Capital Outlay Fund   | 300,266      | 0            | 300,266        |   |        |

|   | Maintenance and Operation Expenditures |           |           |           |           |           | % Inc./(Decr.)<br>from<br>Prior FY |
|---|--|-----------|-----------|-----------|-----------|-----------|------------------------------------|
|   | Salaries and Benefits                  |           | Other     |           | TOTAL     |           |                                    |
|   | Prior FY                               | Budget FY | Prior FY  | Budget FY | Prior FY  | Budget FY |                                    |
| <b>100 Regular Education</b>  |  |           |           |           |           |           |                                    |
| 1000 Instruction  | 1,732,687                              | 956,642   | 34,775    | 49,349    | 1,767,462 | 1,005,991 | -43.1%                             |
| 2000 Support Services   |  |           |           |           |           |           |                                    |
| 2100 Students   | 274,733                                | 181,528   | 19,017    | 19,868    | 293,750   | 201,396   | -31.4%                             |
| 2200 Instructional Staff  | 192,110                                | 200,774   | 38,644    | 44,065    | 230,754   | 244,839   | 6.1%                               |
| 2300, 2400, 2500 Administration   | 604,547                                | 575,503   | 115,270   | 149,489   | 719,817   | 724,992   | 0.7%                               |
| 2600 Oper./Maint. of Plant  | 396,967                                | 389,809   | 744,287   | 765,154   | 1,141,254 | 1,154,963 | 1.2%                               |
| 2900 Other  | 0                                      | 0         | 0         | 0         | 0         | 0         | 0.0%                               |
| 3000 Oper. of Noninstructional Services                                     | 10,500                                 | 8,880     | 0         | 22        | 10,500    | 8,902     | -15.2%                             |
| 610 School-Sponsored Cocurric. Activities                                   | 27,715                                 | 32,143    | 2,195     | 9,725     | 29,910    | 41,868    | 40.0%                              |
| 620 School-Sponsored Athletics  | 108,581                                | 156,511   | 37,381    | 69,892    | 145,962   | 226,403   | 55.1%                              |
| 630, 700, 800, 900 Other Programs   | 21,151                                 | 20,268    | 0         | 0         | 21,151    | 20,268    | -4.2%                              |
| Regular Education Subsection Subtotal                                       | 3,368,991                              | 2,522,058 | 991,569   | 1,107,564 | 4,360,560 | 3,629,622 | -16.8%                             |
| <b>200 and 300 Special Education</b>  |  |           |           |           |           |           |                                    |
| 1000 Instruction  | 359,108                                | 443,507   | 1,316     | 1,316     | 360,424   | 444,823   | 23.4%                              |
| 2000 Support Services   |  |           |           |           |           |           |                                    |
| 2100 Students   | 121,038                                | 121,038   | 155,579   | 155,579   | 276,617   | 276,617   | 0.0%                               |
| 2200 Instructional Staff  | 25,430                                 | 25,430    | 2,072     | 2,072     | 27,502    | 27,502    | 0.0%                               |
| 2300, 2400, 2500 Administration   | 0                                      | 0         | 1,058     | 1,058     | 1,058     | 1,058     | 0.0%                               |
| 2600 Oper./Maint. of Plant  | 0                                      | 0         | 0         | 0         | 0         | 0         | 0.0%                               |
| 2900 Other  | 0                                      | 0         | 0         | 0         | 0         | 0         | 0.0%                               |
| 3000 Oper. of Noninstructional Services                                     | 0                                      | 0         | 0         | 0         | 0         | 0         | 0.0%                               |
| Special Education Subsection Subtotal                                       | 505,576                                | 589,975   | 160,025   | 160,025   | 665,601   | 750,000   | 12.7%                              |
| 400 Pupil Transportation  | 194,119                                | 227,620   | 127,367   | 197,981   | 321,486   | 425,601   | 32.4%                              |
| 510 Desegregation   | 0                                      | 0         | 0         | 0         | 0         | 0         | 0.0%                               |
| 530 Dropout Prevention Programs   | 0                                      | 0         | 0         | 0         | 0         | 0         | 0.0%                               |
| 540 Joint Career and Technical Education<br>and Vocational Education Center | 0                                      | 207       | 0         | 0         | 0         | 0         | 0.0%                               |
| 550 K-3 Reading Program   | 18,387                                 | 18,568    | 0         | 0         | 18,387    | 18,568    | 1.0%                               |
| <b>Budgeted Expenditures</b>  | 4,087,073                              | 3,358,221 | 1,278,961 | 1,465,570 | 5,366,034 | 4,823,791 | -10.1%                             |

**Summary of School District Adopted Expenditure Budget (Concl'd)**

CTD number 090202000  
Version Adopted

| <b>Total expenditures by fund</b> |                              |                  |   |  |
|-----------------------------------|------------------------------|------------------|---|--|
| <b>Fund</b>                       | <b>Budgeted Expenditures</b> |                  | <b>\$ Increase/(Decrease) from Prior FY</b> | <b>% Increase/(Decrease) from Prior FY</b> |
|                                   | <b>Prior FY</b>              | <b>Budget FY</b> |   |  |
| Maintenance & Operation           | 5,366,034                    | 4,823,791        | (542,243)                                   | -10.1%                                     |
| Instructional Improvement         | 0                            | 0                | 0   | 0.0%                                       |
| English Language Learner          | 0                            | 0                | 0   | 0.0%                                       |
| Compensatory Instruction          | 0                            | 0                | 0   | 0.0%                                       |
| Classroom Site                    | 1,378,054                    | 814,174          | (563,880)                                   | -40.9%                                     |
| Federal Projects                  | 1,157,500                    | 634,157          | (523,343)                                   | -45.2%                                     |
| State Projects                    | 75,000                       | 73,099           | (1,901)                                     | -2.5%                                      |
| Unrestricted Capital Outlay       | 317,554                      | 300,266          | (17,288)                                    | -5.4%                                      |
| New School Facilities             | 0                            | 0                | 0   | 0.0%                                       |
| Adjacent Ways                     | 196,084                      | 175,000          | (21,084)                                    | -10.8%                                     |
| Debt Service                      | 1,000                        | 100              | (900)                                       | -90.0%                                     |
| School Plant Fund                 | 20,000                       | 15,000           | (5,000)                                     | -25.0%                                     |
| Auxiliary Operations              | 100,000                      | 100,000          | 0   | 0.0%                                       |
| Bond Building                     | 0                            | 0                | 0   | 0.0%                                       |
| Food Service                      | 300,000                      | 300,000          | 0   | 0.0%                                       |
| Other                             | 1,483,000                    | 1,222,476        | (260,524)                                   | -17.6%                                     |

| <b>M&amp;O Fund Special Education Programs by type</b> |                 |                  |
|--|-----------------|------------------|
| <b>Program (A.R.S. §§15-761 and 15-903)</b>            | <b>Prior FY</b> | <b>Budget FY</b> |
| Total All Disability Classifications                   | 570,752         | 655,151          |
| Gifted Education                                       | 0               | 0                |
| Remedial Education                                     | 0               | 0                |
| ELL Incremental Costs                                  | 0               | 0                |
| ELL Compensatory Instruction                           | 0               | 0                |
| Vocational and Technical Education (non-CTED)          | 0               | 0                |
| Career Education (non-CTED)                            | 0               | 0                |
| Career Technical Education (CTED)                      | 94,849          | 94,849           |
| <b>TOTAL</b>   | <b>665,601</b>  | <b>750,000</b>   |

| <b>Proposed staffing summary</b>                 |   |                     |                  |                          |            |
|--|---|---------------------|------------------|--------------------------|------------|
| <b>Staff Type</b>                                | <b>Purchased Services Personnel FTE</b> | <b>Employee FTE</b> | <b>Total FTE</b> | <b>Staff-Pupil Ratio</b> |            |
| <b>Certified --</b>                              |   |                     |                  |                          |            |
| Superintendent, principals, other administrators | 0                                       | 3                   | 3                | 1 to                     | 123.7      |
| Teachers   | 0                                       | 29                  | 29               | 1 to                     | 12.8       |
| Other  | 0                                       | 1                   | 1                | 1 to                     | 371.0      |
| Subtotal   | 0                                       | 33                  | 33               | 1 to                     | 11.2       |
| <b>Classified --</b>                             |   |                     |                  |                          |            |
| Managers, supervisors, directors                 | 0                                       | 5                   | 5                | 1 to                     | 74.2       |
| Teachers aides                                   | 0                                       | 18                  | 18               | 1 to                     | 20.6       |
| Other  | 0                                       | 10                  | 10               | 1 to                     | 37.1       |
| Subtotal   | 0                                       | 33                  | 33               | 1 to                     | 11.2       |
| <b>TOTAL</b>                                     | <b>0</b>                                | <b>66</b>           | <b>66</b>        | <b>1 to</b>              | <b>5.6</b> |
| <b>Special education --</b>                      |   |                     |                  |                          |            |
| Teacher  | 0                                       | 1                   | 1                | 1 to                     | 22.0       |
| Staff  | 0                                       | 208                 | 13               | 1 to                     | 16.5       |

District name Joseph City Unified School District

CTD number 090202000

Version Adopted

**FY 2026 Truth in Taxation Work Sheet (A.R.S. Section 15-905.01)**

|    |  |                    |  |
|----|--|--------------------|--|
| 1. | FY 2026 Truth in Taxation Base Limit (from FY 2025 TNT work sheet, line 3 + line 11) | \$ <u>0</u>        |  |
| 2. | Deduction for discontinued programs  | <u>          </u>  |  |
| 3. | Adjusted FY 2026 TNT Base Limit  | \$ <u><u>0</u></u> |  |

primary property tax rate  
related to budgeted  
expenditures

**FY 2026 Budgeted Expenditures**

|    |  |             |                   |
|----|--|-------------|-------------------|
| 4. | Desegregation (no longer a primary levy, must be zero)               | \$ <u>0</u> | <u>          </u> |
| 5. | Dropout prevention (from page 1, line 27)                            | <u>0</u>    | <u>          </u> |
| 6. | Joint Career and Technical Education and Vocational Education Center | <u>0</u>    | <u>          </u> |
| 7. | Small school adjustment (from page 7, line 4, columns A and B)       | \$ <u>0</u> | <u>          </u> |

**Adjustments for FY 2025 Expenditures**

|     |  |                      |                   |
|-----|--|----------------------|-------------------|
| 8.  | Desegregation, dropout prevention, and Joint Career and Technical Education and Vocational Education Center          |                      |                   |
| a.  | FY 2025 Total actual expenditures for programs above   | \$ <u>          </u> |                   |
| b.  | Sum of FY 2025 original budget amounts for programs above<br>(from FY 2025 TNT work sheet, sum of lines 4, 5, and 6) | <u>0</u>             |                   |
| c.  | Expenditures over/(under) original budget (line 8.a minus line 8.b)  | \$ <u>0</u>          |                   |
| 9.  | Small school adjustment  |                      |                   |
| a.  | FY 2025 final budget for small school adjustment   | \$ <u>          </u> |                   |
| b.  | FY 2025 original budget for small school adjustment (from FY 2025 TNT work sheet, line 7)                            | \$ <u>0</u>          |                   |
| c.  | Amount over/(under) budget for small school adjustment (line 9.a minus line 9.b)                                     | \$ <u>0</u>          |                   |
| 10. | Total (add lines 4 through 7 and line 8.c. and line 9.c.)  | \$ <u><u>0</u></u>   |                   |
| 11. | Excess over Truth in Taxation Limit (1)<br>(Line 10 minus line 3. If negative, enter zero.)                          | \$ <u><u>0</u></u>   |                   |
| 12. | Amount to be levied in FY 2026 for Adjacent Way pursuant to A.R.S. §15-995 (from page 5, footnote 2) (1)             | \$ <u>0</u>          | <u>          </u> |
| 13. | Amount to be levied in FY 2026 for liabilities in excess of the Budget pursuant to A.R.S. §15-907 (1)                | \$ <u>          </u> | <u>          </u> |

**Calculations for Truth in Taxation Notice**

|      |   |                          |  |
|------|---|--------------------------|--|
| A.   | Sum of lines 11, 12, and 13               | \$ <u>0</u>              |  |
| B.1. | Current assessed value                    | \$ <u>          </u>     |  |
| B.2. | (Line 3 divided by line B.1) x \$10,000   | \$ <u>          </u> (2) |  |
| C.1. | Sum of lines 3, 11, 12, and 13            | \$ <u>0</u>              |  |
| C.2. | (Line C.1 divided by line B.1) x \$10,000 | \$ <u>          </u> (2) |  |

- (1) If an amount on line 11, 12, or 13 is greater than zero, the district must publish a Truth in Taxation Hearing Notice as described in A.R.S. §15-905.01.
- (2) \$10,000 is used in these calculations to determine the amounts to include on the truth in taxation hearing notice for a \$100,000 home, as property taxes on residential properties are levied at 10% of the assessed valuation per A.R.S. §42-15003.

This tab presents information on the amount and planned use of the District's fund balance to increase transparency and provide decision-makers, other stakeholders, and the public more complete financial information. Other than the FY 2024 ending fund balance amounts, all amounts included on this tab are estimates.

|  | Funds                      |   |  |   |               |               |                        |                 |                         |                       |
|--|----------------------------|---|--|---|---------------|---------------|------------------------|-----------------|-------------------------|-----------------------|
|  | General                    |   |  | Capital Projects  |               |               |                        | Special Revenue |                         |                       |
|  | Maintenance and Operations | Unrestricted Capital Outlay (if included in the General Fund) | Other funds reported in the General Fund | Unrestricted Capital Outlay (if not included in the General Fund) | Bond Building | Adjacent Ways | Other capital projects | Classroom Site  | Federal and State Grant | Other special revenue |
| <b>A. Estimated FY 2025 fund balances and planned uses in FY 2026 and thereafter</b>   |                            |   |  |   |               |               |                        |                 |                         |                       |
| 1. <b>FY 2024 final ending fund balance</b>  | 96,115                     | 7,046   | 930,534                                  | 0   | 0             | 146,084       | (1,191,338)            | 914,939         | (643,437)               | 506,837               |
| If the final ending fund balance reported above does not agree with the submitted FY 2024 AFR, revise the AFR and resubmit to ADE. |                            |   |  |   |               |               |                        |                 |                         |                       |
| 2. <b>FY 2025 activity, year-to-date and estimated through June 30</b>   |                            |   |  |   |               |               |                        |                 |                         |                       |
| (a) FY 2025 revenues and other financing sources   | 5,404,081                  | 181,972   | 238,784                                  | 0   | 0             | 26,246        | 201,889                | 400,805         | 1,305,280               | 341,256               |
| (b) FY 2025 expenditures and other financing uses  | 5,307,192                  | 291,762   | 403,209                                  | 0   | 0             | 7,693         | 138,901                | 537,982         | 698,342                 | 749,348               |
| 3. <b>Estimated FY 2025 ending fund balance</b>  | 193,004                    | (102,744)   | 766,109                                  | 0   | 0             | 164,637       | (1,128,350)            | 777,762         | (36,499)                | 98,745                |
| (a) Nonspendable   | 0                          | 0   | 0  | 0   | 0             | 0             | 0                      | 0               | 0                       | 0                     |
| (b) Restricted   | 0                          | 0   | 0  | 0   | 0             | 0             | 0                      | 0               | 0                       | 0                     |
| (c) Committed  | 0                          | 0   | 0  | 0   | 0             | 164,637       | 0                      | 777,762         | 0                       | 98,745                |
| (d) Assigned   | 0                          | 0   | 0  | 0   | 0             | 0             | 0                      | 0               | 0                       | 0                     |
| (e) Unassigned   | 140,080                    | (102,744)   | 766,109                                  | 0   | 0             | 0             | (1,128,350)            | 0               | (36,499)                | 0                     |
| (f) Total (amount must agree to line 3 above)  | 140,080                    | (102,744)   | 766,109                                  | 0   | 0             | 164,637       | (1,128,350)            | 777,762         | (36,499)                | 98,745                |
| 4. <b>FY 2025 estimated ending fund balance details and planned uses</b>   |                            |   |  |   |               |               |                        |                 |                         |                       |
| (a) Fund deficit   | 0                          | (102,744)   | 0  | 0   | 0             | 0             | (1,128,350)            | 0               | (36,499)                | 0                     |
| (b) Fund balance exceeding budget capacity in budget controlled funds  | 0                          | 0   |  | 0   |               |               |                        | 0               | 0                       |                       |
| (c) Planned to be spent in FY 2026   | 140,080                    | 0   | 766,109                                  | 0   | 0             | 0             | 0                      | 73,885          | 0                       | 98,745                |
| (d) Maintained for spending after FY 2026  | 58,842                     | 0   | 0  | 0   | 0             | 164,637       | 0                      | 487,877         | 0                       | 0                     |
| (e) Total (amount must agree to line 3 above)  | 198,922                    | (102,744)   | 766,109                                  | 0   | 0             | 164,637       | (1,128,350)            | 561,762         | (36,499)                | 98,745                |

**10. INFORMATION ITEMS**

**10.A. Review of Possible Policy Changes to be Considered for Adoption at a Future Meeting**

See the attached Policy Advisory for policy changes to be considered. See the Link section of this agenda item to view the current policy manual. No policy changes will be adopted at this meeting. Policies affected:

***Policy Advisories 788-791***

ACA - Sexual Harassment  
ACAA; ACAA-R - Title IX Sex Discrimination  
GBK - Staff Grievances  
JII - Student Concerns, Complaints, and Grievances

***Policy Advisories 866-875***

CA - Administration Goals / Priority Objectives  
CB - Superintendent  
CBA - Qualifications and Duties of the Superintendent  
CBCA; CBCA-R - Delegated Authority  
CBI; CBI-EA; CBI-EB - Evaluation of Superintendent  
CCB; CCB-R - Line and Staff Relations  
CFD; CFD-R; CFD-E - School Based Management  
CHD - Administration in the Absence of Policy  
CK - Administrative Consultants  
CM - School District Annual Report

# POLICY SERVICES

## ADVISORY

Volume 37, Number 4

April 2025

Policy Advisory No. 866.....Policy CA — Administration Goals /  
Priority Objectives

Policy Advisory No. 867.....Policy CB — Superintendent

Policy Advisory No. 868.....Policy CBA — Qualifications and Duties of  
the Superintendent

Policy Advisory No. 869.....Policy CBCA — Delegated Authority  
*NEW* Regulation CBCA-R — Delegated Authority

Policy Advisory No. 870 ..... Policy CBI — Evaluation of Superintendent  
Exhibit CBI-EA — Evaluation of Superintendent  
**(Districts may choose either CBI-EA or CBI-EB)**  
Exhibit CBI-EB — Evaluation of Superintendent

Policy Advisory No. 871 *DELETE*.....Policy CCB — Line and Staff Relations  
*DELETE* Regulation CCB-R — Line and Staff Relations

Policy Advisory No. 872 ..... Policy CFD — School - Based Management  
Regulation CFD-R — School - Based Management  
*DELETE* Exhibit CFD-E — School - Based Management  
*DELETE* Policy CFD — School - Based Management  
(Version for one [1] school District **or** < than 600 students)

Policy Advisory No. 873..... Policy CHD — Administration in the  
Absence of Policy

Policy Advisory No. 874..... Policy CK — Administrative Consultants

Policy Advisory No. 875..... Policy CM — School District Annual Report

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

## POLICY ADVISORY DISCUSSION

### Summary

#### *Section C Revision*

The policy documents listed above have either been removed, added due to recodification, merged with policy documents containing similar topics, or revised (see Discussions below for specific information regarding each document). Documents not listed in this **comparison document** from Section C did not change. The **clean copy document** linked on the Policy Advisory communication provides the revised Section C in its entirety.

#### **Policy Advisory No. 866**

#### **Policy CA — Administration Goals / Priority Objectives**

Minor revisions were made to policy language for clarity, and A.R.S. 15-341 was added as a Legal Reference as the statute pertains to Board policies and curricula noted in Policy CA.

#### **Policy Advisory No. 867**

#### **Policy CB — Superintendent**

Policy CB was updated to align with statutory language (*may* versus *shall*). [A.R.S. 15-503]

#### **Policy Advisory No. 868**

#### **Policy CBA — Qualifications and Duties of the Superintendent**

Subheadings were added and language in Policy CBA was reorganized for clarity (e.g., the statutory fingerprint card was moved to the second paragraph under the subheading, *Qualifications*, and the delegation portion in the second paragraph was moved under the subheading, *Duties*); additional minor edits were included for clarity.

#### **Policy Advisory No. 869**

#### **Policy CBCA — Delegated Authority NEW Regulation CBCA-R - Delegated Authority**

Information from Policy CCB was moved to Policy CBCA under “H.” and the final sentence of the policy; therefore, Policy CCB was removed from the model manual. In addition, E. - G. were added as additional areas of delegated authority, and Legal References A.R.S. 15-806 and 15-341 were added (school closures portions). Also, newly created Regulation CBCA-R contains language formerly in Regulation CCB-R; therefore, Regulation CCB-R was removed from the model manual (no change was made to original regulation language).

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**Policy Advisory No. 870**                      **Policy CBI — Evaluation of Superintendent**  
**Exhibit CBI-EA — Evaluation of Superintendent**  
**(Districts may choose either CBI-EA or CBI-EB)**  
**Exhibit CBI-EB — Evaluation of Superintendent**

Subheadings were added and language in Policy CBI was reorganized for clarity (e.g., information regarding executive session was moved to the first paragraph under the subheading, *Executive Session*, and the sentence regarding the Superintendent’s personnel file was moved to the final sentence under the subheading, *Evaluation Process*). In addition, information regarding the exception to the contract offer date due to an override election per A.R.S. 15-503, and the contract acceptance timeframe were added. As with the Board Self-Evaluation Tool (Policy Advisory 820), Exhibit CBI-E offers Districts a choice: the original Superintendent Evaluation Tool (labeled as CBI-EA in this document) or the updated Superintendent Evaluation Tool (labeled as CBI-EB in this document). The updated Exhibit CBI-EB, created in collaboration with ASA (Arizona School Administrators), contains links to both the Evaluation Tool Guidance Handbook and the Superintendent Evaluation Tool, a free and customizable tool incorporating the yearly Superintendent goals. No change was made to the original language in Exhibit CBI-EA; minor edits were made to CBI-EB.

**Policy Advisory No. 871**    ~~**DELETED**~~    **Policy CCB — Line and Staff Relations**  
~~**DELETED**~~                      **Regulation CCB-R — Line and Staff Relations**

Language in Policy CCB was moved to Policy CBCA under “H.” and the final sentence of the policy; therefore, Policy CCB was removed from the model manual. Language in Regulation CCB-R was moved to newly created Regulation CBCA-R; therefore, CCB-R was removed from the model manual. No change was made to the original regulation language (title change only).

**Policy Advisory No. 872**                      **Policy CFD — School - Based Management**  
**Regulation CFD-R — School - Based Management**  
~~**DELETED**~~    **Exhibit CFD-E — Board Member Oath of Office**  
~~**DELETED (<600 students)**~~    **Policy CFD — School - Based Management**

The statutory requirement for school councils was added to the first sentence [A.R.S. 15-351], as well as the exception for small Districts [A.R.S. 15-352]. Due to the addition of the Small District Exception in the general Policy CFD, the second Policy CFD specifically for Small Districts was removed from the model manual, as well as its accompanying Exhibit CFD-E. Subheadings were also added, and language was removed for clarity in both the general Policy CFD and its accompanying Regulation CFD-R.

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**Policy Advisory No. 873**

**Policy CHD — Administration in the  
Absence of Policy**

The legal reference was removed from Policy CHD as the statute does not specifically reference policy language.

**Policy Advisory No. 874**

**Policy CK — Administrative Consultants**

The phrase “curricula, physical plant and other requirements of the District” was added to Policy CK to align with language in A.R.S. 15-343.

**Policy Advisory No. 875**

**Policy CM — School District Annual Report**

An introductory sentence, subheadings, and information regarding the Financial Annual Report were added to Policy CM for clarity. In addition, the section regarding Guaranteed Energy Cost Savings was removed as a District may include the required information in their Annual Report by utilizing the report provided by the qualified provider.



If you have any questions, call Policy Services at (602) 254-1100. Ask for Dr. Charlotte Patterson, Policy Analyst; Lynne Bondi, Policy Analyst; or Renae Watson, Policy Technician. Our e-mail addresses are, respectively, [cpatterson@azsba.org], [lbondi@azsba.org] and [rwatson@azsba.org].

**Note: This material is written for informational purposes only, and not as legal advice. You may wish to review the policy references and consult an attorney for further explanation.**

# ADVISORY 866

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

CA ©  
**ADMINISTRATION GOALS /  
PRIORITY OBJECTIVES**

The District administration is responsible, within the guidelines established by Board policy, for the direction and coordination of students and staff members in their efforts to reach educational goals adopted by the Board.

The Board expects the administration to specialize in:

- A. ~~the processes of~~ Decision-making and communication;
- B. Planning, organizing, implementing, and evaluating educational programs;
- C. ~~the demonstration of~~ Providing educational leadership;
- D. ~~the development~~ Developing and ~~maintenance of~~ maintaining close working relationships and channels of communication within the District and the community;
- E. ~~the minimization of misunderstandings; and~~ Supporting educational goals adopted by the Board.

Adopted: \_\_\_\_\_

LEGAL REF.:

A.R.S.

15-321

15-341

# ADVISORY 867

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**CB ©  
SUPERINTENDENT**

The Board ~~shall~~ may employ a Superintendent, who ~~shall~~ will enforce the statutes and rules of the state of Arizona and the federal government, and the policies of the Governing Board of the District.

The administration of the school system in all aspects is the responsibility of the Superintendent, whose functions shall be carried out in accordance with the policies of the Board.

The Superintendent may establish regulations for the administration of the District that are in compliance with applicable statutes or regulations of the Arizona Administrative Code and the policies of the Governing Board. These regulations are binding on the employees of this District and students in the schools.

Adopted: \_\_\_\_\_

LEGAL REF.:  
A.R.S.  
15-503

# ADVISORY 868

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

CBA ©  
**QUALIFICATIONS AND DUTIES  
OF THE SUPERINTENDENT**

~~(Performance Responsibilities)~~

**Qualifications**

The Superintendent shall have appropriate qualifications as determined by the Governing Board by action taken at a public meeting.

The Superintendent shall ~~supervise, either directly or through delegation, all activities and all personnel of the school system according to the laws of the state of Arizona, rules of the Arizona State Board of Education, and adopted policies of the Governing Board.~~ have a valid fingerprint card issued pursuant to A.R.S. 41-1758.03.

**Duties**

The Superintendent is the District's chief executive officer and the administrative head of all divisions and departments of the school system. It is the Superintendent's duty to administer the policies of the Board and to provide leadership for the entire school system. The Superintendent is the professional consultant to the Board and, in this capacity, makes recommendations to the Board for changes in Board policies and the educational program.

The Superintendent, as chief administrative officer of the District, shall supervise, either directly or through delegation, all activities and all personnel of the school system according to the laws of the state of Arizona, rules of the Arizona State Board of Education, and adopted policies of the Governing Board.

The Superintendent provides the initiative and the technical guidance for the improvement of the total program of the school system. The delegation of authority for the operation of the various functions of the school system is one of the Superintendent's duties. The Superintendent is, however, responsible to the Board for all functions of the District, including but not limited to those listed below.

***Education:***

- A. Administers the development, coordination, maintenance, and evaluation of ~~the educational program, including the special education program~~ all educational programs.

B. Supervises methods of teaching, supervision, and administration in effect in the schools.

C. Keeps informed of modern educational thought and practices by advanced study, by visiting school systems elsewhere, by attending educational conferences, and by other appropriate means.

D. Keeps the public informed about modern education practices, educational trends, and the policies, practices, and problems in the District schools.

***Management:***

A. Ensures that all activities of the District are conducted in accordance with the laws of the state of Arizona, the regulations of the Arizona Board of Education, and the policies of the Governing Board.

B. Assumes responsibility for the overall financial planning of the District and for the preparation of the annual budget, and ~~submits~~ submits submission of it to the Board for review and approval.

C. Establishes and maintains efficient procedures and effective controls for all expenditures of school funds in accordance with the adopted budget, subject to direction and approval of the Board.

D. Maintains ~~or has maintained~~ adequate records for the schools, including, but not limited to:

1. financial accounts,
2. business and property records,
3. personnel,
4. school population,
5. student records including verifiable documentation of each student's residency in this state in accordance with guidelines and forms adopted by the Arizona Department of Education, and
6. scholastic records.

E. Provides suitable instructions and regulations to govern the maintenance of District properties.

F. Provides suitable instructions and regulations to govern the safety and transportation of students.

- G. Assumes responsibility for the use of buildings and grounds.
- H. Recommends the locations and sizes of new school sites and of additions to existing sites; the locations and sizes of new buildings; the plans for new school buildings; all appropriations for sites and buildings; and improvements, alterations, and changes in the buildings and equipment of the District.
- I. Oversees the processing and submission of required reports.
- J. Interprets the budget and finances to the community.
- K. Remains current on new legislation and implements laws to the best advantage of the District.

***Governing Board:***

- A. Attends and participates in all meetings of the Board and its committees, except when excused by the Board.
- B. Takes prompt action to implement all directives of the Board.
- C. Advises the Board on the need for new and/or revised policies.
- D. Provides timely advice to the Board on the implication of changes in statutes or regulations affecting education.
- E. Informs and advises the Board about programs, practices, and problems of the schools, and keeps the Board informed of the activities operating under the Board's authority.
- F. Prepares and submits to the Board recommendations relative to all matters requiring Board action, placing before the Board such facts, objective information, and reports as are needed to ensure the making of informed decisions.
- G. Develops and implements rules and regulations in keeping with Board policy.
- H. Acts as chief public relations agent for the District.
- I. Acts on own discretion if action is necessary in any matter not covered by Board policy, reports such action to the Board as soon as practicable, and recommends policy guidance in the future.

***Personnel:***

- A. Recommends to the Board the appointment or dismissal of all employees of the District.
- B. Ensures that all employees are evaluated in accordance with the schedule established by the Board.
- C. Determines assignments, defines the duties, and coordinates and directs the work of all employees of the District.
- D. Recommends all promotions, demotions, and salary changes to the Board.
- E. Communicates to all employees all actions of the Board relating to personnel matters, and receives from employees all communications to be made to the Board.

~~The Superintendent shall have a valid fingerprint card issued pursuant to A.R.S. 41-1758.03.~~

Adopted: \_\_\_\_\_

LEGAL REF.:

A.R.S.

15-503

15-802

38-201

41-1758

A.A.C.

R7-2-603

CROSS REF.:

CBI - Evaluation of Superintendent

# ADVISORY 869

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**CBCA ©  
DELEGATED AUTHORITY**

The Governing Board delegates to the Superintendent, among other powers, the authority to perform the following acts without the need for prior Board approval:

A. To give notice to teachers, pursuant to A.R.S. 15-536, of the Board's intention not to offer a teaching contract.

B. To give notice to teachers, pursuant to A.R.S. 15-538.01, of the Board's intention not to offer a teaching contract and to dismiss the teacher.

C. To give notice to an administrator or certificated school psychologist, pursuant to A.R.S. 15-503, of the Board's intention not to offer a new contract.

D. To issue to teachers, pursuant to A.R.S. 15-536, 15-538, and 15-539, written preliminary notices of inadequacy of classroom performance, reporting such issuance to the Governing Board within ten (10) school days.

E. To assign any employee to any position in the District for which the employee is qualified. Any reduction or increase in an employee's salary must have Governing Board approval.

F. To procure goods, services or construction in an amount not to exceed one hundred thousand dollars (\$100,000). All procurement shall comply with the State Board of Education procurement code (School Procurement Code and the Uniform System of Financial Accounting).

G. To close any or all schools, buildings, or other facilities as permitted by law.

H. To delegate to others any of the powers and duties specifically assigned to the Superintendent, unless otherwise specifically limited by statute or Board action. The Superintendent shall continue to be responsible to the Board for the satisfactory execution of the delegated power and duties.

Lines of authority shall be clearly outlined by the Superintendent by means of organization charts, job descriptions, and administrative regulations and directives.

Adopted: \_\_\_\_\_

LEGAL REF.:

A.R.S.

15-503

15-536

15-538

15-538.01

15-539

15-341

15-806

A.A.C.

R7-2-1007

CBCA-R ©

REGULATION

DELEGATED AUTHORITY

(School Administration)

The primary duty of a principal is to administer and supervise the instructional program. A principal, as the educational leader of the school, will administer and supervise the school in accordance with policies and administrative regulations of the District.

A principal will be directly responsible to and will report only to the Superintendent and will keep the Superintendent informed of the conditions and needs of the school. All duties, authority, and responsibilities of the principal will be delegated only by the Superintendent. These duties may include, but are not limited to, the following:

A. A principal is responsible for the operation of the educational program of the school.

B. A principal is responsible for the supervision and evaluation of the building staff members.

C. A principal will maintain discipline on the part of personnel and students.

D. A principal will care for and protect the building, the equipment, the grounds, and other school property.

E. A principal will maintain school records and prepare reports.

F. A principal will take reasonable precautions to safeguard the health and welfare of students and staff members, will report accidents, will formulate plans for emergencies, and will conduct evacuation drills each school month and keep written records of such drills.

G. A principal will be responsible for maintaining a close relationship with the community and should interpret the educational program to the citizens of the District.

H. A principal will, by advanced study, by visits to school systems in other areas, by attendance at educational conferences, and by other means remain well informed relative to modern educational thought and practice.

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## ADVISORY 870

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**CBI ©  
EVALUATION OF SUPERINTENDENT**

**Executive Session**

Any meetings of the Board to compile evaluations, or meetings to discuss the evaluations with the Superintendent, shall be held in executive session unless the Superintendent requests that any such meeting be held in open session. Board members shall have the opportunity to discuss with the Superintendent any item(s) on which the Board member fails to achieve consensus.

**Evaluation Process**

The Governing Board shall evaluate the Superintendent at least once each year.

Prior to the academic year, the Board and Superintendent will meet to agree on an evaluation instrument. The evaluation(s) shall relate to the Superintendent's duties, responsibilities, and progress toward established goals. The Superintendent shall provide each member of the Board a copy of the agreed upon evaluation instrument not later than September 1.

The Board President shall schedule a meeting not later than March 30, when the Board will devote an executive session to the evaluation of the Superintendent's performance, to discuss working relationships between the Superintendent and the Board, and to review the Superintendent's contract (with the Superintendent present).

~~Any meetings of the Board to compile evaluations, or meetings to discuss the evaluations with the Superintendent, shall be held in executive session unless the Superintendent requests that any such meeting be held in open session. Board members shall have the opportunity to discuss with the Superintendent any item(s) on which the Board member fails to achieve consensus.~~

A copy of any written evaluation shall be given to the Superintendent. If in disagreement with such evaluation, the Superintendent may respond in writing to the Governing Board.

The evaluation and any comments by the Superintendent shall become a part of the Superintendent's personnel file.

### **Contract Modifications**

Upon the conclusion of the evaluation, the Governing Board may determine whether any changes in the compensation and benefits or contract term of the Superintendent are warranted, subject to the following:

If the Superintendent's contract with the School District is for multiple years, the School District shall not offer to extend or renegotiate the contract until no earlier than fifteen (15) months before the expiration of the contract.

If the Superintendent's contract with the School District is for a single year, on or before May 15 of each year the Board shall offer a contract for the next school year to the Superintendent unless, on or before April 15, the Board gives notice to the Superintendent of the Board's intention not to offer a new administrative contract; this contract may or may not be for the position of Superintendent. Acceptance of this contract must be in writing within thirty (30) days or the offer is revoked.

#### **Exception: Override Election**

If the Governing Board calls for an override election per A.R.S. 15-481, it shall offer a contract to certified administrators on or before June 15 unless timely notice is given, per A.R.S. 15-503(D), of the Governing Board's intent not to offer a new contract.

~~The evaluation and any comments by the Superintendent shall become a part of the Superintendent's personnel file.~~

Adopted: \_\_\_\_\_

LEGAL REF.:

A.R.S.

15-341

15-503

CROSS REF.:

CBA - Qualifications and Duties of the Superintendent

CBI-EA ©

EXHIBIT

EVALUATION OF SUPERINTENDENT

***(Districts may choose either CBI-EA or CBI-EB)***

Evaluation Rating Symbols

O = Outstanding; S = Satisfactory; N = Needs Improvement;  
U = Unsatisfactory; X = Not Observed

Note: Any rating of outstanding, needs improvement, or unsatisfactory requires the evaluator to list specific information in the Comments section that justifies and supports such rating.

**A. Education**

O S N U X

A. Administers the development, coordination, maintenance, and evaluation of the educational program, including the special education program.

O S N U X

B. Supervises methods of teaching, supervision, and administration in effect in the schools.

O S N U X

C. Keeps informed of modern educational practices and thought by advanced study, by visiting school systems elsewhere, by attending educational conferences, and by other appropriate means.

O S N U X

D. Keeps the public informed about modern education practices, educational trends, and the policies, practices, and problems in the District schools.

***Comments regarding Section A:***

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**B. Management**

O S N U X

A. Ensures that all activities of the District are conducted in accordance with the laws of the state of Arizona, the regulations of the Arizona Board of Education, and the policies of the Governing Board.

O S N U X

B. Assumes responsibility for the overall financial planning of the District and for the preparation of the annual budget, and submits it to the Board for review and approval.

O S N U X

C. Establishes and maintains efficient procedures and effective controls for all expenditures of school funds in accordance with the adopted budget, subject to direction and approval by the Board.

O S N U X

D. Maintains or has maintained adequate records for the schools, including financial accounts; business and property records; and personnel, school population, and scholastic records.

O S N U X

E. Provides suitable instructions and regulations to govern the maintenance of school properties.

O S N U X

F. Provides suitable instructions and regulations to govern the transportation of students.

O S N U X

G. Assumes responsibility for the use of buildings and grounds.

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

O S N U X

H. Recommends the locations and sizes of new school sites and of additions to existing sites; the locations and sizes of new buildings; the plans for new school buildings; all appropriations for sites and buildings; and improvements, alterations, and changes in the buildings and equipment of the District.

O S N U X

I. Oversees the processing and submission of required reports.

O S N U X

J. Interprets the budget and finances to the community.

O S N U X

K. Remains current on new legislation and implements laws to the best advantage of the District.

***Comments regarding Section B:***

**C. Governing Board**

O S N U X

A. Attends and participates in all meetings of the Board and its committees, except when excused by the Board.

O S N U X

B. Takes prompt action to implement all directives of the Board.

O S N U X

C. Advises the Board on the need for new and/or revised policies.

O S N U X

D. Provides timely advice to the Board on the implication of changes in statutes or regulations affecting education.

O S N U X

E. Informs and advises the Board about programs, practices, and problems of schools, and keeps the Board informed of the activities operating under the Board's authority.

O S N U X

F. Prepares and submits to the Board recommendations relative to all matters requiring Board action, placing before the Board such facts, objective information, and reports as are needed to ensure the making of informed decisions.

O S N U X

G. Develops and implements rules and regulations in keeping with Board policy.

O S N U X

H. Acts as chief public relations agent for the District.

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

O S N U X

I. Acts on own discretion if action is necessary in any matter not covered by Board policy, reports such action to the Board as soon as practicable, and recommends policy guidance in the future.

***Comments regarding Section C:***

**D. Personnel**

O S N U X

A. Recommends to the Board the appointment or dismissal of all employees of the District.

O S N U X

B. Ensures that all employees are evaluated in accordance with the schedule established by the Board.

O S N U X

C. Determines assignments, defines the duties, and coordinates and directs the work of all employees of the District.

O S N U X

D. Recommends all promotions, demotions, and salary changes to the Board.

O S N U X

E. Communicates to all employees all actions of the Board relating to personnel matters, and receives from employees all communications to be made to the Board.

***Comments regarding Section D:***

***Summary:***

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**CBI-EB ©**

**EXHIBIT**

**EVALUATION OF SUPERINTENDENT  
SUPERINTENDENT EVALUATION HANDBOOK  
AND  
SUPERINTENDENT EVALUATION TOOL**

***(Districts may choose either CBI-EA or CBI-EB)***

To view/access the District's Superintendent Evaluation Tool Guidance Handbook created by ASA/ASBA, [click here](#).

To view/access the District's Superintendent Evaluation Tool created by ASA/ASBA, [click here](#).

# ADVISORY 871

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

~~CCB ©  
LINE AND STAFF RELATIONS~~

***Remove per PA 871 - April 2025 (Added to CBCA).***

~~Unless otherwise specifically limited by statute or Board action, any of the powers and duties specifically assigned to the Superintendent may be delegated to others serving under the Superintendent. However, the Superintendent shall continue to be responsible to the Board for the satisfactory execution of the delegated power and duties.~~

~~Lines of authority shall be clearly outlined by the Superintendent by means of organization charts, job descriptions, and administrative regulations and directives.~~

~~CCB-R ©~~

REGULATION

~~LINE AND STAFF RELATIONS~~

~~(School Administration)~~

*Remove per PA 871 - April 2025* (Added to CBCA-R).

~~The primary duty of a principal is to administer and supervise the instructional program. A principal, as the educational leader of the school, will administer and supervise the school in accordance with policies and administrative regulations of the District.~~

~~A principal will be directly responsible to and will report only to the Superintendent and will keep the Superintendent informed of the conditions and needs of the school. All duties, authority, and responsibilities of the principal will be delegated only by the Superintendent. These duties include, but are not limited to, the following:~~

~~A. A principal is responsible for the operation of the educational program of the school.~~

~~B. A principal is responsible for the supervision and evaluation of the building staff members.~~

~~C. A principal will maintain discipline on the part of personnel and students.~~

~~D. A principal will care for and protect the building, the equipment, the grounds, and other school property.~~

~~E. A principal will maintain school records and prepare reports.~~

~~F. A principal will take reasonable precautions to safeguard the health and welfare of students and staff members, will report accidents, will formulate plans for emergencies, and will conduct evacuation drills each school month and keep written records of such drills.~~

~~G. A principal will be responsible for maintaining a close relationship with the community and should interpret the educational program to the citizens of the District.~~

~~H. A principal will, by advanced study, by visits to school systems in other areas, by attendance at educational conferences, and by other means remain well informed relative to modern educational thought and practice.~~

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

## **ADVISORY 872**

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

CFD ©  
SCHOOL - BASED MANAGEMENT

(School Councils)

**Establishment**

~~A school council shall be established at each school.~~ The Governing Board may delegate to a school council the responsibility to ~~develop~~ provide input for a curriculum and may delegate any additional powers that are reasonably necessary to accomplish decentralization.

~~The Board authorizes the establishment of a school council at each school site. The school council shall follow regulations promulgated by the Board. The authority extended to the school council(s) is to design curricular and instructional strategy/design models that promote the District mission/goals statement.~~

**Exception for Small Districts.** If a District has only one (1) school or fewer than six hundred (600) students, it is not required under Arizona statutes to have a program of school-based management as outlined in Arizona statutes, and the Governing Board elects not to have such a program.

**Purpose**

The school council shall provide input for the creation of curricular and instructional strategies/designs that meet the unique learning needs of the students served at each school.

~~A shared "vision" for curricular and instructional strategies/designs and the involvement of a variety of the members of the school and community who will be most affected by the results are essential.~~

~~Curricular and instructional strategies/designs that result from such shared decision making are limited only by the requirements that they be consistent with and fulfill the mission/goal statements, beliefs, and adopted Board policies of the District and comply with the laws and regulations of the state of Arizona and the United States.~~

This shared decision making shall not supersede Board/Superintendent decision-making responsibilities unless waived by the Board.

## **Membership**

The school council at each school shall take into consideration the ethnic composition of the local community and ~~initially~~ shall be composed of:

- A. Parents or guardians of students enrolled in the school who are not employed by the District in the school of proposed membership.
- B. Teachers.
- C. Noncertificated employees.
- D. Community members.
- E. Students if the school is a high school.
- F. The principal of the school.

## **Selection**

Initially, each of the above school council members shall be selected in the manner and by the procedure specified in A.R.S. 15-351. The school council shall then adopt written guidelines that specify the number of school council members and the methods for the selection of school council members. Thereafter, representatives shall be selected by their groups in the manner determined.

There must be an equal number of teachers and parents of pupils enrolled in the school on the council, and they shall constitute a majority of the council members.

The principal will serve as chairperson of the school council unless another person is elected by a majority of the school council members.

Adopted: \_\_\_\_\_

### **LEGAL REF.:**

A.R.S.  
15-351  
15-352  
43-1089.01  
A.G.O.  
I99-018

### **CROSS REF.:**

BDD - Board-Superintendent Relationship  
CBCA – Delegated Authority  
~~CCB – Line and Staff Relations~~

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

CFD-R ©

REGULATION

**SCHOOL - BASED MANAGEMENT**

**(School Councils)**

~~The District endorses shared decision-making contingent upon a school council fulfilling the following elements:~~

- ~~A. Curricular and instructional implementation strategies/designs must fulfill the mission statement and adopted beliefs of the District.~~
- ~~B. The school council should carefully follow the processes, including brainstorming, consensus building, and pyramiding. This is "vision" creation, as opposed to a problem solving process.~~
- ~~C. The school council must fully analyze and explore current resources and assess options for reaching their vision of excellence.~~
- ~~D. The school council, with approval by the principal, will, at scheduled intervals, monitor and evaluate implementation based on a written evaluation plan. The evaluation plan must include some demonstrably valid, quantifiable measures of progress.~~

**Role and Responsibility of the School Council**

***The council:***

- A. Is advisory to the school administrative staff.
- B. Is a representative group that solicits input from parents, community, and staff members.
- C. Reviews literature and data.
- D. Makes recommendations for school improvement.
- E. Monitors implementation structure for new instructional designs.
- F. Promotes a shared decision-making model that involves all constituencies in fulfilling the mission and goals of the District.
- G. Provides local leadership and representation in the school decision-making structure.

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

~~There may be a tendency for a school council to lose its understanding of extended ownership to groups affected by its decisions, and, in effect, become a new local bureaucracy. To avoid this result, employees must be aware and remind one another that the movement to shared decision making at the school level is not for the purpose of creating new, smaller bureaucracies to replace a larger bureaucracy, but, rather, a movement to involve all constituencies in fulfilling the mission and beliefs of the District.~~

### ~~Proposal Outline~~

~~Shared decision-making proposals are for the purpose of creating new and effective curricular and instructional strategies/designs and increasing student learning. All proposals shall be submitted to the principal and shall, as nearly as possible, follow the outline identified below.~~

#### ~~**Shared decision making — curricular and/or instructional strategy/design plan process proposal requirements:**~~

- ~~A. Documentation that the new curricular and instructional design was developed in conjunction with parents, students, teachers, and support personnel.~~
- ~~B. Documentation of parent, student, teacher, and support staff support of the program.~~
- ~~C. Proposal development:
  - ~~1. Needs assessment.~~
  - ~~2. Goals.~~
  - ~~3. Measurable performance objectives.~~
  - ~~4. Proposal implementation (activities):
    - ~~a. Staffing.~~
    - ~~b. Materials, supplies, equipment.~~
    - ~~e. Facilities.~~
    - ~~d. Staff training.~~
    - ~~e. Support services.~~~~
  - ~~5. Time line (calendar of events).~~
  - ~~6. Evaluation design.~~
  - ~~7. Budget.~~~~
- ~~D. Statement(s) of assurances that the proposal is:~~

- ~~1. To increase the efficiency and effectiveness of the school.~~
- ~~2. To increase academic achievement for "all" students.~~

~~E. Provision of a dissemination plan.~~

~~F. Provision of a monitoring plan.~~

### **~~Conflict Resolution~~**

~~If a school council's curricular and/or instructional strategy/design plan conflicts with an existing Board approved program or policy, the following steps can be taken:~~

~~A. The school council shall attempt to design an alternative plan that arrives at the same intended outcomes without violation or conflict with the Board approved program or policy.~~

~~B. If this cannot be accomplished, the school council may request a waiver for a strategy/design plan that conflicts with existing Board approved programs or policies.~~

~~C. If a plan requires waivers, it must be approved by the principal and brought to the Superintendent for approval and possible submission to the Board.~~

~~D. Waivers may be granted for temporary and specific periods of time and will be evaluated in light of the plan's ability to better implement the mission statement and adopted beliefs of the District.~~

### **~~Requests for Additional Authority~~**

~~Additional responsibilities and authority may be delegated to a school council if deemed necessary by the Board. The school council may request additional authority to accomplish delegated responsibilities by submitting a written proposal to the Superintendent, which must contain the elements identified below.~~

~~A. The principal's statement of support.~~

~~B. Motion of the council to request additional authority and vote count.~~

~~C. Specific authority requested and reason for request, analyzing how the request will improve the program for all children.~~

~~D. Possible impact of additional authority on personnel use and cost of programs to be improved.~~

~~E. Suggested date of termination of authority unless reapproved by the Governing Board~~

CFD-E ©

EXHIBIT

SCHOOL - BASED MANAGEMENT

SCHOOL COUNCILS

*Remove per PA 872 - April 2025*

~~Research has identified characteristics of effective schools. Such research makes it clear that the most influential unit of effective school change or improvement is the individual school demonstrating the following characteristics:~~

- ~~A. Consensus on explicit instructional goals and beliefs (mission statement).~~
- ~~B. District-level support for school improvement; Governing Board, administration, and staff commitment to current research and the District-adopted mission statement.~~
- ~~C. Ongoing staff development and training.~~
- ~~D. High level of parental involvement and support.~~
- ~~E. Individual school autonomy and flexibility in the development of new curricular and instructional designs.~~
- ~~F. Collaborative, collegial instructional planning.~~
- ~~G. A focus on basic skills acquisition.~~
- ~~H. An emphasis upon higher-order cognitive skills.~~
- ~~I. Teacher responsibility for effective instructional and classroom management decisions and practices.~~
- ~~J. Teacher/parent accountability and acceptance of responsibility for student performances.~~
- ~~K. A safe, orderly, and disciplined school climate.~~
- ~~L. Strong instructional leadership.~~
- ~~M. Frequent monitoring of student progress.~~
- ~~N. Measurable student performance outcomes.~~

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**CFD ©  
SCHOOL - BASED MANAGEMENT  
(School Councils)**

*Remove per PA 872 - April 2025* (Merged "Small District" version with "All District" version.)

~~The District, having only one (1) school or fewer than six hundred (600) students, is not required under Arizona statutes to have a program of school-based management as outlined in Arizona statutes, and the Governing Board elects not to have such a program.~~

~~Adopted: November 20, 2005~~

~~LEGAL REF.:~~

~~A.R.S.~~

~~15-351~~

~~15-352~~

~~43-1089.01~~

~~A.G.O.~~

~~199-018~~

~~CROSS REF.:~~

~~BDD—Board Superintendent Relationship~~

~~CCB—Line and Staff Relations~~

## **ADVISORY 873**

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**CHD ©  
ADMINISTRATION IN THE  
ABSENCE OF POLICY**

The Superintendent shall have the authority to implement action if a situation should develop that is not covered by established Board policy. It is the Superintendent's duty to inform the Board of any such action and of the need to develop an official policy.

Adopted: \_\_\_\_\_

~~LEGAL REF.:~~

~~A.R.S.~~

~~15-321~~

# ADVISORY 874

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

**CK ©  
ADMINISTRATIVE CONSULTANTS**

Professional consultants from the Arizona School Boards Association, the Arizona Department of Education, universities, and colleges, as well as other resource persons, may be used when such services will be helpful in the improvement of the ~~instructional program~~ curricula, physical plant and other requirements of the District. All consultants shall be approved by the Superintendent prior to the invitation and arrangement for such visitation.

Adopted: \_\_\_\_\_

LEGAL REF.:  
A.R.S.  
15-343

# ADVISORY 875

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

CM ©  
SCHOOL DISTRICT ANNUAL REPORT

Districts are responsible for filing several annual reports including but not limited to the ones listed below.

**Academic Annual Report**

The Board shall make an annual report to the County School Superintendent on or before October 1 each year in the manner and form and on the forms prescribed by the Superintendent of Public Instruction or County School Superintendent. The Board shall also make reports directly to the County School Superintendent or the Superintendent of Public Instruction whenever required.

If the District has been assigned a letter grade of A pursuant to A.R.S. 15-241 during at least two (2) out of the last three (3) consecutive years and has not been assigned a letter grade of C, D, or F during the same three (3) years the District may receive exemptions from statutes and rules prescribed in statute. Should the District believe it qualifies for an exemption the District may submit a request for exemption to the Arizona State Board of Education. The State Board of Education shall review and may approve the exemption submitted by the District. The State Board of Education will not approve exemptions that directly apply to specific areas as noted in A.R.S. 15-215.

**~~Guaranteed Energy Cost  
Saving Contract Annual Reports~~**

~~The District shall report to the School Facilities Board annually, not later than October 15 actual energy and cost savings pursuant to a guaranteed energy cost savings contract.~~

~~The District shall also report for any guaranteed energy cost savings contract to the Department of Commerce Energy Office and the School Facilities Board:~~

- ~~A. The name of the project.~~
- ~~B. The qualified provider.~~
- ~~C. The total cost of the project.~~
- ~~D. The expected energy cost savings and relevant escalators.~~

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

~~The District shall retain savings achieved by a guaranteed energy cost saving contract, which may be used to pay for contract and project implementation.~~

### **Financial Annual Report**

The Governing Board shall publish an annual financial report for the prior fiscal year by November 15 of each year, using the format prescribed by the Auditor General per A.R.S. 15-904. This financial report shall be prepared and distributed by the District by October 15, including to the Country School Superintendent. On or before October 15 the Governing Board shall submit the annual financial report for the previous fiscal year to the Arizona Department of Education (ADE).

Adopted: \_\_\_\_\_

#### LEGAL REF.:

A.R.S.

15-213.01

15-215

15-341

15-904

#### CROSS REF.:

DBF - Budget Hearings and Reviews/Adoption Process

DIC - Financial Reports and Statements

# POLICY SERVICES ADVISORY

Volume 36, Number 3

July 2024

Policy Advisory No. 788 ..... Policy ACA — Sexual Harassment

Policy Advisory No. 789 ..... Policy ACAA — Title IX Sex Discrimination  
~~Sexual Harassment~~  
Regulation ACAA-R — Title IX Sex Discrimination  
~~Sexual Harassment~~

Policy Advisory No. 790 ..... Policy GBK — Staff Grievances

Policy Advisory No. 791 ..... Policy JII — Student Concerns, Complaints,  
and Grievances

## POLICY ADVISORY DISCUSSION

### Summary

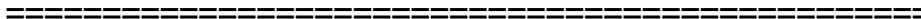
The following policy advisories are derived from the Department of Education’s (DOE) Final Rule under Title IX, to ensure that, under Title IX, no person experiences sex discrimination or harassment in federally funded education. Effective August 1, 2024, the Final Rule protects against all sex-based harassment and discrimination for all persons, including students and employees; promotes accountability and fairness; and empowers and supports students and families.

The Final Rule requires schools to take prompt and effective action when appropriate, reaffirms the DOE’s commitment to fairness for all parties, including parents and guardians, and demonstrates its respect for complainants’ autonomy and privacy. It clarifies definitions, the scope of sex discrimination, and schools’ obligations, including but not limited to taking prompt and effective action, providing supportive measures, and communicating its nondiscrimination policies. It also provides schools with the flexibility needed to implement Title IX in differing educational communities and settings, protects students, employees and applicants from discrimination based on pregnancy or related conditions, and protects students and employees from retaliation.

Because of the extensive nature of this final rule, districts may want to consider consulting with their legal counsel regarding specific policy revisions for their unique communities.

**Note:** The DOE’s process is still ongoing for a Title IX regulation related to athletics.

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.



If you have any questions, call Policy Services at (602) 254-1100. Ask for Dr. Charlotte Patterson, Policy Analyst; Lynne Bondi, Policy Analyst or Renae Watson, Policy Technician. Our e-mail addresses are, respectively, [cpatterson@azsba.org], [lbondi@azsba.org] and [rwatson@azsba.org]. You may also fax information to (602) 254-1177.

**Note: This material is written for informational purposes only, and not as legal advice. You may wish to review the policy references and consult an attorney for further explanation.**

ACA ©  
**SEXUAL HARASSMENT**

All individuals associated with this District, including, but not necessarily limited to, the Governing Board, the administration, the staff, and students, are expected to conduct themselves at all times so as to provide an atmosphere free from sexual harassment.

Sexual harassment is a form of sex discrimination that violates Title VII of the Civil Rights Act of 1964 and Title IX of the Education Amendments of 1972.

The Equal Employment Opportunity Commission defines "sexual harassment" as unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature when:

- A. Submission to such conduct is either explicitly or implicitly made a term or condition of an individual's employment; or
- B. Submission to or rejection of such conduct is used as a basis for employment decisions affecting such individual; or
- C. Such conduct has the purpose or effect of substantially interfering with an individual's work performance, or creating an intimidating, hostile, or offensive work environment.

Sexual harassment may include, but is not limited to:

- A. Suggestive or obscene letters, notes, invitations, derogatory comments, slurs, jokes, epithets, assault, touching, impeding or blocking movement, leering, gestures, or display of sexually suggestive objects, pictures, or cartoons.
- B. Continuing to express sexual interest after being informed that the interest is unwelcome. (Reciprocal attraction between peers is not considered sexual harassment.)
- C. Implying or withholding support for an appointment, promotion, or change of assignment; suggesting that a poor performance report will be prepared; suggesting that probation will be failed.
- D. Coercive sexual behavior used to control, influence, or affect the career, salary, and/or work environment of another employee.
- E. Offering or granting favors or employment benefits, such as promotions, favorable performance evaluations, favorable assignments, favorable duties or shifts, recommendations, reclassifications, et cetera, in exchange for sexual favors.

Anyone who is subject to sexual harassment, or who knows of the occurrence of such conduct, should inform the compliance officer, as provided in ACA-R.

A substantiated charge against a staff member in the District shall subject such staff member to disciplinary action.

All matters involving sexual harassment complaints will remain confidential to the extent practicable and allowable by law possible.

Adopted: \_\_\_\_\_

LEGAL REF.:

A.R.S.

41-1461 *et seq.*

20 U.S.C. 1681, Education Amendments of 1972, Title IX,  
as amended in 2024, Title IX

20 U.S.C. 1703, Equal Employment Opportunity Act of 1972

42 U.S.C. 2000, Civil Rights Act of 1964 as amended, Title VII

CROSS REF.:

AC - Nondiscrimination/Equal Opportunity

GBA - Equal Employment Opportunity

GCQF - Discipline, Suspension, and Dismissal of Professional Staff Members

GDQD - Discipline, Suspension, and Dismissal of Support Staff Members

KED - Public Concerns/Complaints about Facilities or Services

KFA - Public Conduct on School Property

ACAA ©  
**TITLE IX SEX DISCRIMINATION**  
**SEXUAL HARASSMENT**

Title IX of the Federal Education Amendments Act protects people from discrimination based on sex in education programs or activities that receive Federal financial assistance. The District does not discriminate on the basis of sex and is required by Title IX not to discriminate in such a manner. The District adheres to all conditions established by Title IX by recognizing the right of every student who attends school in the District and every employee who works in the District to do so without the fear of sex discrimination, to include unlawful sexual harassment.

The District accepts and shall employ the definition of sexual harassment as established by the Title IX regulations. Sexual harassment means conduct on the basis of sex that satisfies one (1) or more of the following:

- A. An employee of the District conditioning the provision of an aid, benefit, or service of the District on an individual's participation in unwelcome sexual conduct;
- B. Unwelcome conduct determined by a reasonable person to be so severe, or pervasive, ~~and objectively offensive~~ that it effectively denies a person equal access to the District's education program or activity; or
- C. "Sexual assault" as defined in 20 U.S.C. 1092(f)(6)(A)(v), "dating violence" as defined in 34 U.S.C. 12291(a)(10), "domestic violence" as defined in 34 U.S.C. 12291(a)(8), or "stalking" as defined in 34 U.S.C. 12291(a)(30).
- D. Hostile Environment Harassment.

The District also accepts and shall employ the definition of a complainant as an individual who is alleged to be the victim of conduct that could constitute sexual harassment, and a respondent as an individual who has been reported to be the perpetrator of conduct that could constitute sexual harassment.

The District shall designate and authorize an employee as the "Title IX Coordinator" to comply with its responsibilities pertaining to sexual harassment under Title IX. Inquiries about the application of Title IX may be referred to the District's Title IX Coordinator.

Any person may report sex discrimination, including sexual harassment, regardless of whether the person reporting is the person alleged to be the victim of the reported conduct or not. A report may be made in person, by mail, by telephone, or by electronic mail, using the contact information listed for the Title IX Coordinator, or by any other means that results in the Title IX Coordinator receiving the person's verbal or written report. Such a report may be made at any time (including during non-business hours) by using the telephone number or

electronic mail address, or by mail to the office address listed for the Title IX Coordinator. The District shall notify students, parents or legal guardians of students, employees, applicants for employment, and all unions or professional organizations holding collective bargaining or professional agreements with the District, of the name or title, office address, electronic mail address, and telephone number of the Title IX Coordinator.

The District will respond promptly when any school employee has notice of sex discrimination, including sexual harassment. Upon receipt of notice of sexual harassment, the District shall notify students, parents or legal guardians of students, employees, applicants for employment, and all unions or professional organizations holding collective bargaining or professional agreements with the District, of the District's grievance procedures and grievance process, including how to report or file a complaint of sex discrimination, how to report or file a ~~formal~~ complaint of sexual harassment, and how the District shall respond. The District is committed to investigating each ~~formal~~ complaint submitted and to taking appropriate action on all confirmed violations of policy. The District shall follow grievance procedures that provide for the prompt and equitable resolution of complaints from students and employees alleging sexual harassment.

The District ~~shall, to the extent reasonably feasible,~~ will make reasonable efforts to keep confidential the identity of any individual who has made a report or filed a ~~formal~~ complaint of sexual harassment, ~~any complainant,~~ any individual who has been reported to be the perpetrator of sex discrimination, any respondent, and any witness, except as is necessary to carry out the grievance process and as may otherwise be permitted by law.

Title IX sex discrimination complaints, including sexual harassment complaints, may include violations covered by Arizona's mandatory reporting statute, A.R.S. §13-3620. Any abuses classified by statute as "reportable offenses" must be reported as such to the authorities because not reporting a reportable offense is classified as a Class 6 Felony.

### **Retaliation Prohibited**

Neither the District nor any person may intimidate, threaten, coerce, or discriminate against any individual for the purpose of interfering with any right or privilege secured by Title IX, or because the individual has in good faith made a report or complaint, testified, assisted, or participated or refused to participate in any manner in an investigation, proceeding, or hearing. Intimidation, threats, coercion, or discrimination, including charges against an individual for violations that do not involve sex discrimination or sexual harassment, but arise out of the same facts or circumstances as a report or complaint of sex discrimination or a ~~report or formal complaint~~ of sexual harassment, for the purpose of interfering with any right or privilege secured by Title IX, constitutes retaliation.

Adopted: \_\_\_\_\_

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

LEGAL REF.:

A.R.S.

13-3620

20 U.S.C. 1092

20 U.S.C. 1681, Education Amendments of 1972, Title IX, as amended in 2024,  
Title IX

34 U.S.C. 12291

CROSS REF.:

AC - Nondiscrimination/Equal Opportunity

JB - Equal Educational Opportunities

ACAA-R ©

REGULATION

**TITLE IX SEX DISCRIMINATION  
~~/SEXUAL HARASSMENT~~**

**Title IX Coordinator**

The Superintendent shall appoint an employee as the "Title IX Coordinator." If the Title IX Coordinator is the respondent, the complaint shall be filed with the Superintendent.

***Title IX Coordinator:***

Name/Title: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

E-mail: \_\_\_\_\_

Telephone: \_\_\_\_\_

**Response to Sex Discrimination  
~~Sexual Harassment~~**

~~When the District has A recipient with knowledge of conduct that reasonably may constitute sex discrimination actual knowledge of sexual harassment in an its education program or activity must respond promptly and effectively of the District against a person in the United States, it shall respond promptly in a manner that is not deliberately indifferent.~~

~~An "education program or activity" includes locations, events, or circumstances over which the District exercised substantial control over both the respondent and the context in which the sex discrimination occurs, and also includes any building owned or controlled by a student organization that is officially recognized by the District.~~

~~A. "Actual knowledge" means notice of sexual harassment or allegations of sexual harassment to a District's Title IX Coordinator or to any employee.~~

~~B. An "education program or activity" includes locations, events, or circumstances over which the District exercised substantial control over both the respondent and the context in which the sexual harassment occurs, and also includes any building owned or controlled by a student organization that is officially recognized by the District.~~

*Note:* This material is written for informational purposes only, and not as legal advice. You may wish to consult an attorney for further explanation.

~~C. A District is "deliberately indifferent" only if its response to sexual harassment is clearly unreasonable in light of the known circumstances.~~

The District's initial response to any report of sex discrimination sexual harassment must treat complainants and respondents equally by offering supportive measures to both and must follow the established grievance process before disciplining a respondent.

~~Even if no formal complaint has been filed,~~ The Title IX Coordinator shall promptly:

- A. Contact the complainant to discuss the availability of supportive measures;
- B. Consider the complainant's wishes with respect to supportive measures;
- C. Inform the complainant of the availability of supportive measures; ~~with or without the filing of a formal complaint;~~ and
- D. Explain to the complainant the process for filing a ~~formal~~ complaint.

Supportive measures are non-disciplinary, non-punitive individualized services offered as appropriate, as reasonably available, and without fee or charge to the complainant or the respondent before or after the filing of a ~~formal~~ complaint ~~or where no formal complaint has been filed~~. Such measures are designed to restore or preserve equal access to the District's education program or activity without unreasonably burdening the other party, including measures designed to protect the safety of all parties or the District's educational environment, or deter sex discrimination sexual harassment. Supportive measures may include counseling, extensions of deadlines or other course-related adjustments, modifications of work or class schedules, and other similar measures. The District shall maintain as confidential any supportive measures provided to the complainant or respondent, to the extent that maintaining such confidentiality would not impair the ability of the District to provide the supportive measures. The Title IX Coordinator is responsible for coordinating the effective implementation of supportive measures.

The District may remove a respondent from the District's education program or activity on an emergency basis, provided that the District undertakes an individualized safety and risk analysis, determines that an immediate threat to the physical health or safety of any student or other individual arising from the allegations of sex discrimination sexual harassment justifies removal, and provides the respondent with notice and an opportunity to challenge the decision immediately following the removal. This provision may not be construed to modify any rights under the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act of 1973, or the Americans with Disabilities Act.

## ~~Response to a Formal Complaint~~

## Response to a Notification of Conduct

The Title IX Coordinator must take the following actions upon being notified of conduct that reasonably may constitute sex discrimination:

~~"Formal complaint" means a document filed by a complainant or signed by the Title IX Coordinator alleging sexual harassment against a respondent and requesting that the District investigate the allegation of sexual harassment. At the time of filing a formal complaint, a complainant must be participating in or attempting to participate in the education program or activity of the District with which the formal complaint is filed. A formal complaint may be filed with the Title IX Coordinator in person, by mail, or by electronic mail, by using the contact information listed above, and by any additional method designated by the District that results in the Title IX Coordinator receiving the complaint.~~

~~The District may place a non-student employee respondent on administrative leave during the pendency of a grievance process in response to a formal complaint. This provision may not be construed to modify any rights under Section 504 of the Rehabilitation Act of 1973 or the Americans with Disabilities Act.~~

~~For the purpose of addressing formal complaints of sexual harassment, this grievance process shall comply with the following basic elements:~~

~~A. Provide written notice to all parties upon receipt of complaint, which must include:~~

- ~~1. Notice of the District's formal grievance process, including any informal resolution process;~~
- ~~2. Notice of the allegations, including sufficient details to allow respondent to prepare a response (such as the identities of the parties involved in the incident, if known, the conduct allegedly constituting sexual harassment, and the date and location of the alleged incident);~~
- ~~3. A statement that the respondent is presumed not responsible for the alleged conduct and that a determination regarding responsibility is made at the conclusion of the grievance process;~~
- ~~4. Notice that the parties may have an advisor of their choice, who may be, but is not required to be, an attorney, and may inspect and review evidence; and~~

~~5. Notice of any provision in the District's code of conduct that prohibits knowingly making false statements or providing false information in the grievance process.~~

~~B. Treat complainants and respondents equitably;~~

~~C. Require an objective evaluation of all relevant evidence;~~

~~D. Require that the Title IX Coordinator, investigator, decision maker, or any person designated by the District to facilitate an informal resolution process, be properly trained and not have a conflict of interest against complainants and respondents generally or against the particular complainant and respondent;~~

~~E. Include a presumption that the respondent is not responsible for the alleged conduct until a determination has been made at the conclusion of the grievance process;~~

~~F. Include reasonably prompt timeframes for the conclusion of the grievance process;~~

~~G. Describe or list the possible disciplinary sanctions and remedies that may be implemented following a determination of responsibility;~~

~~H. State that the District uses a preponderance of evidence standard to determine responsibility;~~

~~I. Include the procedures and permissible reasons for appeal by a respondent or a complainant;~~

~~J. Describe the range of supportive measures available to complainants and respondents; and~~

~~K. Not require, allow, or use evidence or questions that constitute or seek legally privileged information, unless the privilege is waived.~~

A. Treat the complainant and respondent equitably. (§ 106.44(f)(1)(i)).

B. Offer and coordinate supportive measures, as appropriate, for the complainant. If the recipient has initiated grievance procedures or offered an informal resolution process to the respondent, offer and coordinate supportive measures as appropriate, for the respondent. (§ 106.44(f)(1)(ii)).

C. Notify the complainant, or if the complainant is unknown, the individual who reported the conduct, of the grievance procedures and the informal resolution process, if available and appropriate. (§ 106.44(f)(1)(iii)(A)).

D. If a complaint is made, notify the respondent of the grievance procedures and the informal resolution process, if available and appropriate. (§ 106.44(f)(1)(iii)(B)).

E. In response to a complaint, initiate the recipient's grievance procedures or informal resolution process, if available and appropriate. (§ 106.44(f)(1)(iv)).

F. In the absence of a complaint or the withdrawal of any or all of the allegations in a complaint, and in the absence or termination of an informal resolution process, make a fact-specific determination by considering, at a minimum, eight (8) listed factors, and determining whether the conduct as alleged presents an imminent and serious threat to the health or safety of a complainant or other person or prevents the recipient from ensuring equal access based on sex to its education program or activity such that the Title IX Coordinator may initiate a complaint. (§ 106.44(f)(1)(v)).

G. If the Title IX Coordinator initiates a complaint, notify the complainant prior to doing so and appropriately address reasonable concerns about the complainant's safety or the safety of others. (§ 106.44(f)(1)(vi)).

H. Regardless of whether a complaint is initiated, take other appropriate prompt and effective steps to ensure that sex discrimination does not continue or recur within the recipient's education program or activity, in addition to providing remedies to an individual complainant. (§ 106.44(f)(1)(vii)).

If the conduct alleged ~~in a formal complaint~~ does not meet the Title IX definition of sex discrimination ~~sexual harassment~~ as established in Governing Board policy, did not occur in the District's education program or activity, or did not occur against a person in the United States, then the District shall dismiss the allegations for purposes of Title IX but may still address the allegations in any manner the District deems appropriate under other District policies.

The District may dismiss a ~~formal~~ complaint or any allegations therein, if at any time:

- A. The complainant notifies the Title IX Coordinator in writing that the complainant would like to withdraw the ~~formal~~ complaint or any allegations therein;
- B. The respondent is no longer enrolled or employed by the District; or
- C. Specific circumstances prevent the District from gathering evidence sufficient to reach a determination as to the ~~formal~~ complaint or allegations therein.

Upon dismissal of a ~~formal~~ complaint or any allegations therein, the District shall promptly send written notice of the dismissal, including the reasons for the dismissal, simultaneously to the parties.

When investigating a ~~formal~~ complaint and throughout the grievance process, the District shall:

- A. Ensure that the burden of proof and the burden of gathering evidence rests on the District and not on the parties, except that certain treatment records cannot be obtained without voluntary, written consent of a party;
- B. Provide an equal opportunity for the parties to present witnesses and evidence;
- C. Not restrict the ability of either party to discuss the allegations or to gather and present evidence;
- D. Provide the parties with the same opportunities to have others present during any meeting or grievance proceeding;
- E. Provide, to a party whose participation is invited or expected, written notice of the date, time, location, participants, and purpose of any meeting or grievance proceeding, with sufficient time for the party to prepare to participate;
- F. Provide both parties an equal opportunity to inspect and review any evidence so that each party can meaningfully respond to the evidence prior to the conclusion of the investigation (prior to completion of the investigative report, the investigator will send to each party and the party's advisor, if any, a copy of all evidence gathered during the investigation and will allow the parties at least ten (10) days to submit a written response to any of the evidence); and
- G. Create an investigative report that fairly summarizes relevant evidence and, at least ten (10) days prior to a determination of responsibility, send to each party and the party's advisor, if any, the investigative report in an electronic format or hard copy, for their review and written response.

After the District has sent the investigative report to the parties and before reaching a determination regarding responsibility, the decision-maker(s) shall afford each party the opportunity to submit written, relevant questions that a party wants asked of any party or witness, provide each party with the answers, and allow for additional, limited follow-up questions from each party. Questions and evidence about the complainant's sexual predisposition or prior sexual behavior are not relevant, unless such questions and evidence are offered to prove that someone other than the respondent committed the conduct alleged by the complainant, or if the questions and evidence are offered to prove consent.

Decision-maker(s) must not have bias or conflict of interest. A decision-maker may be the Title IX Coordinator or investigator as long as there is no bias or conflict or interest.

The decision-maker(s), ~~who cannot be the same person(s) as the Title IX Coordinator or the investigator(s)~~, shall apply the District's established standard of evidence and shall issue a written determination regarding responsibility that includes:

- A. Identification of the allegations potentially constituting sex discrimination ~~sexual harassment~~;
- B. A description of the procedural steps taken from the receipt of the ~~formal~~ complaint through the determination, including any notifications to the parties, interviews with parties and witnesses, site visits, methods used to gather other evidence, and hearings held;
- C. Findings of fact supporting the determination;
- D. Conclusions regarding the application of the District's code of conduct to the facts;
- E. A statement of and rationale for the result as to each allegation, including a determination regarding responsibility, any disciplinary sanctions the District imposes on the respondent, and whether remedies designed to restore or preserve equal access to the District's education program or activity shall be provided by the District to the complainant; and
- F. The District's procedures and permissible bases for the complainant and respondent to appeal.

The District shall provide the written determination to the parties simultaneously. The Title IX Coordinator is responsible for effective implementation of any remedies.

The District shall offer both parties the right to appeal from a determination regarding responsibility and from a dismissal of a ~~formal~~ complaint or any allegations therein, on the following bases:

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

As to all appeals, the District shall:

- A. Notify the other party in writing when an appeal is filed and implement appeal procedures equally for both parties;

- B. Ensure that the decision-maker(s) for the appeal is not the same person as the decision-maker(s) that reached the determination regarding responsibility or dismissal, the investigator(s), or the Title IX Coordinator;
- C. Ensure that the decision-maker(s) for the appeal does not have a conflict of interest or bias ~~for or against complainants or respondents generally or an individual complainant or respondent~~;
- D. Give both parties a reasonable, equal opportunity to submit a written statement in support of, or challenging, the outcome;
- E. Issue a written decision describing the result of the appeal and the rationale for the result; and
- F. Provide the written decision simultaneously to both parties.

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

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

The District shall maintain for a period of seven (7) years records of:

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

The District shall create and maintain for a period of seven (7) years, records of any actions, including supportive measures taken in response to a report or ~~formal~~ complaint of sex discrimination ~~sexual harassment~~. In each instance, the District shall document the basis for its conclusion that its response was not deliberately indifferent, and document that it has taken measures designed to restore or preserve equal access to the District's education program or activity. If a District does not provide a complainant with supportive measures, then the District shall document the reasons why such a response was not clearly unreasonable in light of the known circumstances. The documentation of certain bases or measures does not limit the District in the future from providing additional explanations or detailing additional measures taken.

**GBK ©  
STAFF GRIEVANCES**

Effective communication between District employees, the administrative staff, and the Board is essential for proper operation of the schools. The Governing Board, therefore, authorizes the Superintendent to establish a grievance procedure for employees as the prescribed means of resolving grievances at the earliest date and the lowest possible administrative level. In cases of alleged sex discrimination, this grievance procedure should provide supportive measures to complainants and respondents affected by the alleged sex discrimination conduct, must require adequate notice, must provide an equal opportunity to present and access evidence, and provide a reasonable opportunity for response by each party.

Such procedure shall provide for an appeal to the Board for review of any grievance that cannot be resolved at the administrative level. In such instances, ~~the affected individual may request that the Governing Board review the situation. Such~~ request shall be in writing and shall contain the basis for the appeal, including the act or acts out of which the grievance arose, identification of the Board policies and/or administrative regulations involved, and the remedy sought. Within five (5) working days following notification of the Superintendent's decision, any written request for appeal shall be submitted to the Superintendent for transmittal to the Board. The Governing Board, at a time of its choosing, shall review the grievance and issue a response within fifteen (15) working days following such review.

The decision of the Governing Board is final.

Adopted: \_\_\_\_\_

LEGAL REF.:

A.R.S.

38-532

20 U.S.C. 1681, Education Amendments of 1972, Title IX,

as amended in 2024, Title IX

**JII ©  
STUDENT CONCERNS, COMPLAINTS,  
AND GRIEVANCES**

The Superintendent is directed to establish procedures whereby students with sufficient concern may present a complaint or grievance regarding a violation of their constitutional rights, equal access to programs, discrimination, or personal safety provided that:

A. The topic is not the subject of disciplinary or other proceedings under other policies and regulations of the District, and

B. The procedure shall not apply to any matter for which the method of review is prescribed by law, or the Governing Board is without authority to act.

A complaint or grievance may be raised regarding any one (1) or more of the following:

A. Violation of the student's constitutional rights.

B. Denial of an equal opportunity to participate in any program or activity for which the student qualifies, not related to the student's individual capabilities.

C. Discriminatory treatment on the basis of race, color, religion, sex, age, national origin, or disability.

In cases of alleged sex discrimination, this grievance procedure should provide supportive measures to complainants and respondents affected by the alleged sex discrimination conduct, must require adequate notice, must provide an equal opportunity to present and access evidence, and provide a reasonable opportunity for response by each party.

D. Concern for the student's personal safety.

Refer to Board Policy JICK for procedures applying to a complaint or grievance that alleges incidences of student violence, harassment, intimidation, or bullying.

The complaint or grievance accusation must be made within thirty (30) calendar days of the time the student knew or should have known that there were grounds for the complaint or grievance. The initial complaint or grievance should be made using form JII-EA; however, a verbal complaint or grievance may be made to any school staff member. The receiving staff member shall immediately inform an administrator of the complaint or grievance.

When the initial complaint or grievance is submitted in a manner other than on the prescribed form, the administrator shall obtain from the student the particulars of the accusation and complete form JII-EA immediately thereafter. The administrator shall especially note all student-provided particulars determined by the Superintendent to be necessary for the complaint or grievance to be investigated. Any question concerning whether a complaint or grievance falls within this policy shall be determined by the Superintendent.

If the receiving school administrator is included in the allegation, the complaint or grievance shall be transmitted to the next higher administrative supervisor. Failure by the staff member to timely inform a school administrator or next higher administrative supervisor of a student's allegation may subject the staff member to disciplinary action. The staff member shall preserve the confidentiality of the subject, disclosing it only to the appropriate school administrator or next higher administrative supervisor or as otherwise required by law.

A student or student's parent or guardian may initiate the complaint process by completing Exhibit JII-EA.

A complaint or grievance may be withdrawn at any time. Once withdrawn, the process cannot be reopened if the resubmission is longer than thirty (30) calendar days from the date of the occurrence of the alleged incident.

Retaliatory or intimidating acts against any student who has made a complaint under this policy and its corresponding regulations, or against a student who has testified, assisted or participated in any manner in an investigation relating to a complaint or grievance, are specifically prohibited and constitute grounds for a separate complaint.

To assure that students and staff are aware of its content and intent, a notice of this policy and procedure shall be posted conspicuously in each school building and shall be made a part of the rights and responsibilities section of the student handbook. Forms for submitting complaints are to be available to students, staff and parents or guardians in the school offices.

Disposition of all complaints or grievances shall be reported to the Superintendent and the compliance officer for discrimination if other than the Superintendent. The Superintendent will determine if the policies of the District have been appropriately implemented and will make such reports and/or referrals to the Board as may be necessary.

The Superintendent shall develop procedures for the maintenance and confidentiality of documentation related to the receipt of a student's complaint or grievance, findings of the investigation, and disposition of the matter. The documentation shall not be used to impose disciplinary action unless the appropriate school official has investigated and determined there was an actual occurrence of the alleged incident.

Knowingly submitting a false report under this policy shall subject the student to discipline up to and including suspension or expulsion. Where disciplinary action is necessary pursuant to any part of this policy, relevant District policies shall be followed.

When District officials have a reasonable belief or an investigation reveals that a reported incident may constitute an unlawful act, law enforcement authorities will be informed.

Adopted: <-- z2AdoptionDate -->

LEGAL REF.:

A.R.S.

15-341

20 U.S.C. 1681, Education Amendments of 1972, Title IX,  
as amended in 2024, Title IX

CROSS REF.:

AC - Nondiscrimination/Equal Opportunity

ACA - Sexual Harassment

GBEB - Staff Conduct

JB - Equal Educational Opportunities

JIC - Student Conduct

JICFA - Hazing

JICK - Student Bullying/Harassment/Intimidation

JK - Student Discipline

JKD - Student Suspension

JKE - Expulsion of Students

KE - Public Concerns and Complaints

#### **10.B. Requests for Future Agenda Items**

This agenda item is for the Governing Board to have a running record of potential items to be placed on future agendas. There will be no discussion on the substance, merits, or issues relating to the proposed agenda item.

#### **10.C. Upcoming Meetings and Events Calendar**

- Next Regular Board Meeting - August 12, 2025; 6:00 p.m.
- Back-to-School Opening Meeting for Staff - July 30, 2025; 9:00 a.m.; HS Auditorium
- ASBA Law Conference - September 3-5, 2025; Scottsdale, AZ
- ASBA Delegate Assembly - September 6, 2025; Scottsdale, AZ
- ASBA-ASA Annual Conference - December 17-19, 2025; Phoenix, AZ

#### **11. ADJOURNMENT**