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Policy 5.2-1.0 - Revisions update the District's purchasing policy to reflect current purchasing practices and clarify requirements related to purchasing authority, emergency purchases, competitive procurement, E-Rate purchases, and sole-source purchases. The policy continues to require compliance with applicable state law and Board policy.

Policy 5.2-3.0 - Revisions modernize the policy to reflect current methods of disbursing District funds, including warrants, checks, ACH transactions, bank account debit systems, wire transfers, and other payment methods authorized by law. The policy also updates language regarding purchasing and payment procedures, recurring purchases, and required signatures.

Policies 5.2-5.0, 5.3-1.0, 5.3-2.0, 5.3-4.0, and 5.4-1.0 have been updated to modernize language, align Board policy with current District financial practices and applicable requirements, and more clearly distinguish Board policy from administrative procedures. Detailed operational procedures have been removed from the policy language, where appropriate, and will be maintained in the District's Finance Procedures Guide.

Policy 5.2-7.0 updates district procurement guidelines by raising competitive solicitation thresholds, requiring formal board approval only at \$50,000 and above, and allowing "Do Not Exceed" caps for open-ended service contracts. It also clarifies standard bidding exemptions (such as sole-source, emergency, and instructional items), updates federal fund procedures, and formalizes ethics rules around gifts and allowable district sponsorships.

Policy 7.5-4.0 updates provisions governing transfers of military-dependent students in accordance with current Oklahoma law. The revisions clarify that qualifying military-dependent students are eligible for admission regardless of district capacity and further align the District's transfer procedures with Oklahoma State Department of Education requirements.

5.2 - 1.0 PURCHASING

The purchasing function provides supplies, equipment and materials authorized by designated purchasing officers. It is the responsibility of the central office administrators to aid and advise administrators in the proper selection of materials and to ensure compliance with all aspects of law in the purchasing process.

The purchase of materials will be made utilizing properly executed purchase orders, supported by purchase requisitions, bearing the signatures of appropriate approving officers. This procedure will apply throughout this school district except when petty cash funds are used to purchase materials.

Purchasing officers will be designated by the Superintendent of Schools.

The Superintendent shall have authority, without prior action of the Board of Education, to make emergency purchases totaling not more than ~~\$10,000~~ \$50,000 during any emergency period. The following definitions apply for the purpose of this policy:

- A. A purchase is an “emergency purchase,” if (1) it is reasonably necessary for the protection of students, employees or property of the School District; (2) the purchase must be made before a special meeting of the Board of Education can be held; and (3) the need for the purchase could not have been reasonably anticipated in time to permit a special board meeting to be scheduled prior to the purchase.
- B. An “emergency period” is the time period between the date of the first emergency purchase under this policy and the date of the next special or regular meeting of the Board of Education.

In selecting service providers for all eligible goods and/or services for which Universal Service Fund (“E-Rate”) support will be requested, the district shall:

- A. Make a request for competitive bids for all eligible goods and/or services for which Universal Service Fund support will be requested and comply with applicable state and local procurement processes included in District policies and procedures.
- B. Wait at least four weeks before posting date of the FCC Form 470 on the USAC Schools and Libraries website before making commitments with the service providers selected.
- C. Consider all bids submitted and select the most cost-effective service offering, with price the primary factor considered.
- D. Control the competitive bidding process rather than (1) surrendering control to a service provider participating in the bidding process or (2) including service provider contact information on the FCC Form 470.

A contract may be awarded for a supply or service without competition when the superintendent, or a designee, determines in writing that there is only one source for the required supply or service, and it is in the best interest of the school district to have the supply or service. The writing justifying the sole source must specify why it is necessary and justified.

State law and Board policy will be followed in the purchasing process.

APPROVED: July 23, 1990; October 21, 1993; September 14, 1998;
September 19, 2005

REVISED: August 10, 2009; October 8, 2018, [September 14, 2026](#)

5.2 - 3.0 DISBURSEMENT OF FUNDS FROM GENERAL FUND

~~Except for disbursements authorized for petty cash, a~~All disbursements shall be made by warrant, check, Automated Clearing House (ACH), bank account debit system, wire transfer, or other automated payment method authorized by law. No checks ~~will~~ shall be issued for cash, ~~advance~~ ~~or~~ to bearer, and no blank checks are to be issued.

The Administrator for the Division of Finance and the business office staff shall be responsible for preparing all documents to be presented to the Board for approval. ~~All disbursements shall be made only on purchase orders approved by the Board of Education.~~ Purchases and disbursements shall be processed in accordance with the encumbrance, purchase order, Board approval, and payment procedures required by law. The Board may approve blanket purchase orders as allowed by law for reoccurring purchases of goods or services. ~~62 O.S. §310.8.~~

Warrants and checks shall bear the signatures or approved facsimile signatures ~~of the Board President, Clerk, and Treasurer~~ required by law.

Reference: 70 O.S. § 5-115; 5-155; 62 O.S. § 310.8

ADOPTED: October 21, 1993

REVISED: September 14, 1998; September 14, 2026

5.2 – 5.0 REIMBURSEMENT FOR CO-CURRICULAR ACTIVITY EXPENSES

Statement of Policy

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

Definitions

Terms used in this policy are defined as follows:

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

A credit card slip alone is not a receipt.

5. "Supporting documentation" means a memorandum containing a request for reimbursement and explanation of the reason for the expense. All receipts for which reimbursement is sought and a claim must be attached to the memorandum.
6. "Claim" is a document prepared by a sponsor who seeks reimbursement which contains the following information:
 - a. a description of the authorized school-sponsored cocurricular activity;
 - b. meals;
 - c. motel and hotel expenses; and
 - d. encumbrance to be charged for expense.

7. "Credit card slip" is the customer's copy of the credit card charge form. A credit card slip alone is not a receipt. To qualify as a receipt a credit card slip must be attached to a supporting invoice issued by the vendor which contains all the information required of a receipt.
8. "Vendor" means the individual or entity that provided the goods or services to the sponsor or student for which reimbursement is sought and a receipt for payment has been issued.
9. "Meals" means actual food expenses incurred while participating in the authorized school-sponsored co-curricular activity.
10. "Authorized school-sponsored co-curricular activity" means participation in an event approved in advance by the Board of Education for a particular group of school district students and their sponsor.

Procedure for Reimbursement

To obtain reimbursement for expenses the sponsor must:

1. Prepare and maintain complete and accurate supporting documentation with attached receipts and claims for the sponsor(s) and students. Requests for reimbursement with insufficient or incomplete documentation will be denied.
2. Submit supporting documentation with attachments to the designated district employee/official.
3. The district will issue payment for reimbursement as soon as accurate, complete documentation, along with attachments, approved by site administrator has been submitted to district Business Office.

Other Issues

1. A request for reimbursement must be made within thirty (30) days after the vendor's invoice is issued.
2. Reimbursements will be issued only for the actual amount of expenses paid by the sponsor(s) and the students. No additional charges will be reimbursed. The district will not issue payment for funds a student or sponsor anticipates incurring in the future.
3. Reimbursement for necessary meal and lodging expenses incurred by school district students and sponsors involved in authorized school-sponsored co-curricular activities may be made from the appropriate activity fund sub-account or from the general fund, as determined appropriate by the Board of Education.
4. Any interpretation of this policy shall be made solely by the Board of Education and shall be binding in all respects.

5. Violation of any of the provisions of this policy by a School District employee/sponsor may result in dismissal or nonrenewal. Violation of the provisions of this policy by a student may result in disciplinary action.

APPROVED: September 19, 2005

REVISED: October 14, 2019

5.2 – 5.0 REIMBURSEMENT FOR CO-CURRICULAR ACTIVITY EXPENSES

Statement of Policy

The Board of Education recognizes that students and sponsors participating in authorized school-sponsored co-curricular activities may incur necessary meal and lodging expenses. The District may pay or reimburse such expenses in accordance with Oklahoma law, this policy, and established District purchasing and accounting procedures.

Whenever practicable, the District will pay authorized expenses directly through its established purchasing and payment procedures rather than requiring a student or sponsor to personally incur the expense.

Reimbursement Procedures

When reimbursement of a student or sponsor is necessary:

1. The expense must be associated with an authorized school-sponsored co-curricular activity and constitute a necessary and reasonable meal or lodging expense.
2. A request for reimbursement must be submitted to the District Business Office and approved by the appropriate administrator or designee.
3. The request must include sufficient documentation to establish the date and purpose of the expense; the amount paid; the individual or entity paid; the individual requesting reimbursement; and proof of payment, including an itemized or other documentation acceptable to the District Business Office.
4. Reimbursement will be limited to actual, documented expenses and will be processed through the District's established accounting and payment procedures.

Source of Funds

Reimbursements authorized under this policy may be paid from the District's General Fund or from an appropriate School Activity Fund subaccount, when permitted by law and consistent with the lawful purpose of the fund.

Administration

The Superintendent or designee is authorized to establish administrative procedures necessary to implement this policy, including reasonable documentation, approval, purchasing, and accounting requirements consistent with Oklahoma law.

Nothing in this policy requires the District to reimburse an expense that was not properly authorized or that does not comply with applicable law or District Procedures.

LEGAL REFERENCE:	70 O.S. § 5-117(A)(24)
APPROVED:	September 19, 2005
REVISED:	October 14, 2019, September 14, 2026

5.2 – 7.0 PROCUREMENT

General Fund Monies

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

Quotes/Requests for Proposals:

- ~~● Less than \$2,000 Shall be secured verbally. Purchase order may be approved by the Superintendent or Superintendent's designee.~~
- ~~● \$2,000 to \$10,000 Shall be obtained in written form from the supplier. Purchase order may be approved by Superintendent or Superintendent's designee.~~
- ~~● \$10,000 and over Shall be secured by sealed quotes or by formal request for proposal in accordance with specific procedures established by the Superintendent. Purchase order or contract must be submitted to the Board of Education for approval before the award is made.~~
- *Under \$5,000: Informal oral or written quotes encouraged.*
- *\$5,000 to \$24,999: Written quote required.*
- *\$25,000 to \$49,999: Requires written quotes from at least three qualified vendors, unless fewer quotes are received after documented good-faith solicitation efforts or the purchase qualifies as a sole-source procurement.*
- *\$50,000 and above: Requires formal sealed bids or RFQs submitted to and approved by the board.*

Prior to the issuance of any purchase order or formal commitment of funds, the district's Encumbrance Clerk must verify that sufficient funds are available in the appropriate account and formally encumber those funds in accordance with 70 O.S. § 5-135.

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

Service and Open-Ended Contracts

For services billed on an hourly, per-unit, or time-and-materials basis, quotes and contracts must establish a mandatory "Do Not Exceed" (DNE) threshold. Work must immediately pause once the DNE cap is reached and may not resume until additional funding and a supplemental purchase order are approved.

Bids

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

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

Public Construction Contracts between \$50,000 and \$100,000 shall be let and awarded to the lowest responsible bidder by receipt of written bids. Public Construction Contracts under \$50,000 but over \$10,000 may be awarded on the basis of written quotes. Contracts for less than \$10,000 (or less than \$25,000 for minor maintenance and repair) may be negotiated directly with a qualified contractor.

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

Standard Exemptions from Bidding

Certain non-construction categories are exempt from competitive bidding requirements:

- Instructional Materials: Textbooks, digital curriculum, and specialized educational software.
- Vehicles & School Buses: Typically acquired via state contract pricing or specialized state programs.
- Cafeteria & Food Services: Governed by federal USDA / Child Nutrition Program procurement guidelines.
- Sole Source Goods/Services: Items are available exclusively from a single vendor. A written justification from either the vendor or requester must outline why the item is only sourced from this vendor.

- Declared Emergencies: Unforeseen conditions threatening student safety or critical facility operations, as authorized by the superintendent.
- Declared Emergencies (Public Construction): Bypassing the Public Competitive Bidding Act for a public construction emergency requires a two-thirds (2/3) majority vote of the Board of Education to officially declare the emergency and enter it into the minutes, pursuant to 61 O.S. § 130.

Federal Funds

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

All purchases with federal funds will be made in accordance with the specific requirements associated with those funds and the Federal Uniform Guidance (2 CFR § 200).

Micro-Purchases: Federal purchases up to the current micro-purchase threshold (typically \$10,000) may be awarded without soliciting competitive price or rate quotations if the price is considered reasonable.

Debarment and Suspension: For any purchase made with federal funds exceeding \$25,000, the district must verify through SAM.gov that the vendor is not suspended, debarred, or otherwise excluded from receiving federal funds.

Buy American: Purchases made for the Child Nutrition Program must adhere to the USDA's "Buy American" provision, prioritizing domestically grown and processed foods to the maximum extent practicable.

Ethics and Conflict of Interest:

District officers, employees, and agents involved in the selection, award, or administration of contracts shall not solicit or accept, for personal benefit, gratuities, favors, kickbacks, or other items of monetary value from contractors, prospective contractors, subcontractors, or parties to subagreements. This prohibition does not preclude the District from soliciting or accepting lawful donations, sponsorships, or contributions for the benefit of the District or its programs, provided such contributions are not a condition of, consideration for, or otherwise connected to the award or administration of a contract.

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

ADOPTED: October 11, 2021

REVISED: October 10, 2022, October 16, 2024, September 14, 2026

5.3 - 1.0 CASH RECEIPTS AND CHANGE FUNDS

All cash received by the district will be properly receipted by an authorized person. Those monies receipted will be deposited on a daily basis in the general fund unless they specifically relate to an activity fund account, in which case they shall be deposited in the appropriate sub-account.

No cash will be left in a building overnight without being placed in a safe. Under no circumstances will an employee leave money in his or her office or classroom overnight. If an activity is held outside of office hours that will result in the collection of money, the sponsor of the activity must make arrangements with the principal or Superintendent to comply with this requirement.

Cash collected for lost equipment, breakage, or repair of equipment purchased with district funds will be deposited to the general fund.

Following are the change funds authorized and their purpose:

<u>Elementary Sites:</u>	\$30.00 for Child Nutrition Program
(excluding Woodlands)	\$50.00 for Child Nutrition Program
<u>Child Nutrition Office:</u>	\$30.00 for Child Nutrition Change
<u>Summer Feeding:</u>	\$100.00 for Summer Feeding Program Change
<u>East Middle School:</u>	\$300.00 for Child Nutrition Program
	\$75.00 for Business Office Change
	\$50.00 for Library Change
<u>West Middle School:</u>	\$300.00 for Child Nutrition Program
	\$75.00 for Business Office Change
	\$50.00 for Library Change
<u>Senior High:</u>	\$500.00 for Child Nutrition Program
	\$75.00 for Business Office Change
	\$50.00 for Library Change
<u>Athletics:</u>	\$4,000.00 for gate change
<u>Administration Business Office</u>	
<u>/Activity</u>	\$50.00 for Activity Fund Office change

ADOPTED: October 21, 1993

REVISED: September 14, 1998; September 19, 2005; July 1, 2012; June 13, 2022

5.3 - 1.0 CASH RECEIPTS AND CHANGE FUNDS

All funds received or collected by the District shall be properly receipted, safeguarded, accounted for, and deposited in accordance with Oklahoma law, State Department of Education requirements, and District procedures.

Funds shall be deposited into the appropriate District or activity fund account within the time required by law. District employees shall not retain District funds for personal safekeeping or leave unsecured funds in classrooms, offices, vehicles, or other unauthorized locations.

The District may maintain change funds when necessary for District operations, including athletic or activity admissions and Child Nutrition operations. Change funds shall be used solely for making change and shall not be used as petty cash or for making purchases.

The Superintendent or designee shall establish administrative procedures and internal controls governing the collection, custody, reconciliation, deposit, and security of District funds, including the amounts and locations of authorized change funds.

The District shall not maintain petty cash accounts unless specifically authorized by the Board of Education in accordance with Oklahoma law.

ADOPTED: October 21, 1993

REVISED: September 14, 1998; September 19, 2005; July 1, 2012; June 13, 2022; September 14, 2026

5.3 - 2.0 ACTIVITY FUNDS

The purpose of the school activity fund is to promote the general welfare, education and morale of all students and to finance extracurricular activities of the student body organizations.

The Board of Education is required to exercise complete control over all school activity funds. The Board of Education, at the beginning of each fiscal year and as needed during each fiscal year, shall approve all school activity fund sub-accounts, all fundraising activities by sub-account and all purposes for which the monies collected in each sub-account can be expended. Ponca City Public Schools will not be responsible for claims resulting from agreements made with clubs or organizations involving district personnel and the payment of money for services when such clubs and organizations operate outside of the Board of Education's authority.

An audit must be made of all activity funds annually by a certified public accountant selected by the Board of Education.

The Superintendent of Schools shall prescribe written procedures governing activity funds.

The school activity fund clerk shall provide the Board of Education with a monthly financial report reflecting the status of each sub-account. The school activity fund custodians will be appointed by the Board of Education and a surety bond will be provided in an amount determined by the Board of Education, but not less than \$1,000.00. The following designated administrators are responsible for school activity funds within their school site or department and are hereby designated activity fund custodians of the Board of Education for the applicable sub-accounts.

<u>School Activity Fund Custodian</u>	<u>Type of Sub-account</u>
Elementary Principal	all site sub-accounts
Secondary Principal	all site sub-accounts except instrumental music and athletic sub-accounts
Instrumental Music Supervisor	instrumental music sub-account
Athletic Director	all athletic sub-accounts
Chief Financial Officer	all administrative sub-accounts
Director of Child Nutrition	Campus Mart and Campus Shoppe sub-accounts
Director of Operation	s maintenance sub-account

In the absence of any of the above-designated custodians, the Administrator for the Division of Finance may sign documents on his or her behalf. The Clerk of the Board of Education or the District Financial Secretary may sign in the absence of the Administrator for the Division of Finance.

Fund Raising Activities

All school activity fund raising activities must be pre-approved by the Board of Education, and the proceeds from these fund raising activities must be deposited intact in the appropriate school activity fund sub-account.

Requests for fund raising activities must be submitted on the appropriate school district form prior to fund raising starting. Fund raising activities must be conducted for a pre-determined, identified need. Activities which are excluded from the annual application process include collections from students and parents for field trips and optional or special classroom supplies, project costs or fees, membership dues, donations, transfers from one sub-account to another, athletic ticket sales, and athletic concession sales.

Projects for the raising of school activity money shall, in general, contribute to the educational experience of pupils and shall add to, not conflict with, the instructional program. Results of fund raisers shall be reported on forms prescribed by the Superintendent. Money raised from the student body as a whole shall be expended so as to benefit the student body as a whole, and not for the benefit of a special group. Student activity money shall, insofar as possible, be expended in such a way as to benefit those pupils who have contributed to the accumulation of such money.

Receipts and Deposits

All school activity fund monies shall be properly receipted and deposited intact by the end of the next business day. Deposits retained overnight shall be kept in a locked school safe or deposited in the school district's designated bank's night depository.

Expenditures

All expenditures from activity funds must be made by check. Cash expenditures for any purpose, including petty cash expenditures, are prohibited. Checks shall be signed by the school activity fund clerk and countersigned by the appropriate school activity fund custodian.

Expenditures may never exceed the balance in the school activity fund sub-account. All expenditures shall be supported by: (1) proper, approved purchase request; (2) purchase order; (3) receipt of goods or services verification; and (4) an original invoice or statement of services rendered. Supporting documentation for petty cash sub-accounts shall, however, be maintained with the general fund purchase orders used to reimburse the petty cash sub-accounts.

Transfers between sub-accounts are accounted for by journal entries as prescribed by the State Department of Education. Transfers between sub-accounts shall be approved by the Board of Education prior to the transfer being made.

Post-dated checks will not be accepted and checks may not be cashed for anyone. Board of Education employees or others may not make purchases through the school activity fund in order to take personal advantage of student body purchasing privileges.

Reference: Okla. Stat. tit. 70, § 5-129

APPROVED: January 3, 1972

REVISED: July 17, 1989; June 8, 1992; June 14, 1993

READOPTED: October 21, 1993

REVISED: September 14, 1998; September 19, 2005; July 1, 2012; October 14, 2019

5.3 - 2.0 ACTIVITY FUNDS

The Board of Education shall exercise control over all school activity funds and revenues in accordance with Oklahoma law, State Board of Education rules, the Oklahoma Cost Accounting System (OCAS), applicable federal requirements, and generally accepted accounting principles applicable to governmental entities.

Establishment and Purpose

The Board shall approve the School Activity Fund and its subaccounts at the beginning of each fiscal year and as needed during the fiscal year. The Board shall approve the purposes for which funds within each subaccount may be raised and expended.

Activity funds shall be used only for lawful purposes consistent with the purpose of the applicable subaccount and for the benefit of students or District programs and activities.

Fundraising

Fundraising activities conducted on behalf of the District or through a school activity fund shall be conducted in accordance with Oklahoma law and District procedures.

The Board delegates to the Superintendent or designee authority to approve individual fundraising activities consistent with Board-approved subaccounts and purposes. Such fundraising activities shall be presented to the Board for approval at its next regular meeting when required by law or State Board rule.

Student participation in fundraising or charitable solicitation shall be voluntary, serve an appropriate education, school, or charitable purpose, and be conducted in accordance with applicable law and administrative procedures.

Administration and Internal Controls

The Board shall appoint the School Activity Fund Custodian or custodians and provide bonding as required by Oklahoma law.

The Superintendent or designee shall establish written administrative procedures and appropriate internal controls governing the receipt, custody, deposit, expenditure, transfer, reconciliation, reporting, and safeguarding of activity funds.

All activity fund transactions shall be properly documented, accounted for, and reported in accordance with Oklahoma law, State Board of Education rules, OCAS requirements, applicable federal requirements, and District procedures.

Activity funds shall not be used for personal purposes or in a manner that provides an improper private benefit.

Board Oversight and Audit

The Board shall receive periodic financial reports regarding the School Activity Fund and shall exercise oversight of its accounts and financial activity.

School activity funds shall be included in the District's annual independent audit and shall be subject to all applicable state and federal audit, record-retention, and financial accountability requirements.

REFERENCES: 70 O.S. § 5-129, 70 O.S. § 5-129.1, as applicable, 70 O.S. § 5-129.2, as applicable, OAC 210:25-5-13, Oklahoma Cost Accounting System (OCAS), current edition

ADOPTED: October 21, 1993

REVISED: September 14, 1998; September 14, 2026

5.3 - 4.0 DISTRICT INVESTMENT POLICY

This investment policy is adopted in accordance with the provisions of applicable law by the Board of Education of the Ponca City School District (the "District"). This policy sets forth the investment policy for the management of the public funds of the District as required by state law.

It is designed to ensure the prudent management of public funds, the availability of operating and capital funds when needed, and reasonable investment returns.

Statutory Authority

Except as otherwise provided by law, the District Treasurer, when authorized by the Board of Education by a written investment policy or resolution, shall invest monies in the custody of the Treasurer in:

1. Direct obligations of the United States Government, its agencies or instrumentalities in which the full faith and credit of the United States Government is pledged; provided the District Treasurer, after completion of an investment education program in compliance with applicable law, may invest funds in the investment account in other obligations of the United States Government, its agencies or instrumentalities;
2. Obligations to the payment of which the full faith and credit of the state of Oklahoma is pledged;
3. Certificates of deposits of banks with investment secured by acceptable collateral as in the deposit of other public monies;
4. Savings accounts or savings certificates of savings and loan associations to the extent that such accounts or certificates are fully insured by the Federal Savings and Loan Insurance Corporation or to the extent that such accounts or certificates are secured by acceptable collateral as in the deposit of other public monies;
5. Repurchase agreements that have underlying collateral consisting of those items specified in paragraphs 1 and 2 above including obligations of the United States, its agencies, and instrumentalities, and where the collateral has been deposited with a trustee or custodian bank in an irrevocable trust or escrow account established for such purposes;
6. County, municipal, or school district direct debt obligations for which an ad valorem tax may be levied or bond and revenue anticipation notes, money judgments against such county, municipality, or school district ordered by a court of record or bonds or bond and revenue anticipation notes issued by a public trust for which such county, municipality or school district is a beneficiary thereof. All collateral pledged to secure public funds shall be valued at no more than market value;
7. Money market mutual funds regulated by the Securities and Exchange Commission and which investments consist of obligations of the United States, its agencies and instrumentalities, and investments in those items and those restrictions specified in paragraphs 1 through 6 above;

8. Warrants, General Obligation Bonds, or Judgments of Ponca City Public Schools;
9. Qualified Pooled Investment Programs through an inter-local cooperative agreement formed pursuant to applicable law and to which the Board of Education has voted to be a member, the investments of which consist of those items specified in paragraphs 1 through 8 above, as well as obligations of the United States agencies and instrumentalities;
10. Any other investment that is authorized by state or federal law.

Organization

The organization of the investment functions of the district shall consist of the Treasurer and Assistant Treasurer. Both positions must have a surety bond for the executing of investment duties.

The school district Treasurer is authorized by the Board of Education to withdraw funds from the Investment Accounts as necessary to meet emergency requirements which cannot be covered by funds from the Operating Account, and to deposit cash received during this period in either the “Operating” or the “Investment Accounts” as deemed desirable after analysis of the cash requirements at the time such cash is received.

Investment Philosophy

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

1. **Liquidity** - Idle cash will be invested to the fullest extent practicable in interest-bearing investments or accounts. However, the portfolio should remain sufficiently liquid to meet all operating requirements that may be reasonably anticipated.
2. **Diversification** - The investment portfolio will be diversified to avoid incurring undue concentration in securities of one type, so that no one class of investments can have a disproportionate impact on the portfolio. This restriction does not apply to U.S. Treasury securities.
3. **Safety of Principal** - The primary investment objective is the preservation of principal and liquidity; income is a secondary objective.
4. **Yield** - The portfolio shall be designed with the objective of attaining a market rate of return throughout budgetary and economic cycles, taking into account the investment risk constraints and liquidity needs. Return on investment is a secondary objective to the preservation of principal and liquidity.

5. **Maturity** - All investments may have maturities to eighteen months, provided sufficient liquidity is available to meet major outlays, except the general fund investments may not exceed twelve months.
6. **Quality of the Instrument and Capability of Investment Management** - The Chief Financial Officer is responsible to see the Treasurer and Assistant Treasurer are qualified and capable of managing the investment portfolio. The Treasurer and Assistant Treasurer will be required to complete an investment education program approved by the State Board of Education for treasurers and maintain any certification of the investment education program.

Safekeeping and Custody

The Treasurer will maintain a list of financial institutions and approved pooled investment programs authorized to provide investment services. In addition, a list will also be maintained of financial institutions with collateral pledged in Ponca City Public Schools' name.

1. Securities purchased from any bank of dealer including appropriate collateral by state law for a particular investment shall be placed under an independent third-party custodial safekeeping agreement. The Trust Department of a financial institution is independent from the financial institution.
2. All securities shall be in the form of book entry, and physical delivery of securities should be avoided.
3. Due to the potential for error and improprieties arising from telephone transactions, all telephone transactions should be supported by written communications. Written communication may be via facsimile if on letterhead and the safekeeping institution has a list of authorized signatures.
4. Written transactions and confirmations of transactions via modems shall be kept in the Treasurer's office.

Reporting and Review of Investments

The Treasurer or Assistant Treasurer shall prepare an investment report. This report should be provided to the Superintendent, Chief Financial Officer, and the Board for review of the investment performance on a regular basis that is no less frequent than monthly. The report will include the following:

1. A listing of individual securities held at the end of the reporting period;
2. Purchase and maturity dates of said securities;
3. Name of applicable fund for said securities;
4. Yield rate for said securities;
5. Collateral held by custodial third party for applicable financial institution.

The Board of Education shall review the Treasurer's investment performance on a regular basis that is no less frequent than monthly.

Depositing of Interest

Unless otherwise directed by the Board through policy or by a special directive, by the Oklahoma Constitution or by the federal government, income earned from the investment of these funds, except those generated by the Gift & Endowment Fund, Bond Funds and Activity Fund, shall be deposited into the General Fund. Each year, the Treasurer shall review the interest earnings for each fund earned during the previous and/or current fiscal year.

Interest earned from the investments of: (1) Gift & Endowment Fund shall be deposited in the Gift & Endowment Fund; (2) Bond Funds shall be deposited in the appropriate Bond Fund as stated in the Treasurer's Resolution to Invest Funds; and (3) the Activity Fund shall be deposited in the Activity Fund.

APPROVED: July 8, 1991; October 21, 1993; September 14, 1998

REVISED: April 17, 2000; September 19, 2005

5.3 – 4.0 DISTRICT INVESTMENT POLICY

Purpose and Authority

The Board of Education adopts this policy to provide for the prudent investment and management of District funds in accordance with Oklahoma law. The District Treasurer, when authorized by the Board, shall invest available District funds only in investments permitted by Oklahoma law and this policy.

The primary objectives of the District's investment program, in order of priority, are: **(1) Legality** - compliance with applicable laws and regulations; **(2) Safety** - preservation of principal; **(3) Liquidity** - availability of funds to meet anticipated District obligations; and **(4) Yield** - a reasonable rate of return consistent with safety and liquidity.

Authorized Investments

District funds may be invested only in investments authorized by 70 O.S. § 5-115, as amended, and other applicable Oklahoma law.

Such investments may include authorized obligations of the United States and State of Oklahoma; properly insured or collateralized deposits and certificates of deposit; authorized repurchase agreements; qualifying governmental debt obligations; qualifying money market mutual funds; District warrants, bonds, or judgments; Board-approved qualified pooled investment programs; and investment programs administered by the Oklahoma State Treasurer.

The District shall use competitive bids to the extent practicable when purchasing United States Government obligations or obligations of its agencies or instrumentalities as required by law.

Investment Standards

- A. **Liquidity.** The investment portfolio shall maintain sufficient liquidity to meet reasonably anticipated operating and financial obligations of the District.
- B. **Diversification.** Investments shall be reasonably diversified when appropriate to reduce unnecessary concentration and investment risk, consistent with the objectives of safety and liquidity.
- C. **Safety of Principal.** Preservation of principal is the primary investment objective. District funds shall not be invested for speculative purposes.
- D. **Yield.** The District shall seek a reasonable market rate of return after giving primary consideration to legality, safety, liquidity, cash-flow requirements, and investment risk.
- E. **Maturity.** Investment maturities shall be consistent with anticipated cash-flow requirements and structured to provide sufficient funds to meet District obligations when due.
- F. **Quality of Investments.** Investments shall be limited to instruments authorized by Oklahoma law and shall satisfy all applicable requirements concerning insurance, collateralization, credit quality, custody, and security.

- G. Investment Management.** The Treasurer and other persons responsible for the investment of District funds shall possess the qualifications, training, bonding, and other requirements established by Oklahoma law and the Board of Education. The Superintendent shall be responsible for seeing that the treasurer and any assistant treasurer are qualified and capable of managing the investment portfolio and satisfactorily complete any investment education programs required by state law or by the Board.

Collateralization and Safekeeping

District deposits and investments shall be insured, collateralized, pledged, held, and safeguarded as required by Oklahoma law. The Treasurer shall ensure that appropriate records and internal controls are maintained for all investment transactions and that District assets are appropriately protected.

Investment Earnings

Income earned from District investments shall be credited to the appropriate District fund in accordance with the Oklahoma Constitution, Oklahoma law, applicable federal requirements, restrictions applicable to the source of funds, and applicable governmental accounting requirements.

Reporting and Board Oversight

The Treasurer or designee shall provide the Board of Education an investment report at least monthly. The Board shall review the investment performance of the Treasurer no less frequently than monthly as required by Oklahoma law.

Investment records shall be maintained in accordance with applicable law, accounting standards, audit requirements, and District record-retention requirements.

Administrative Procedures

The Superintendent, Chief Financial Officer, Treasurer, or their designees may establish administrative procedures and internal controls necessary to implement this policy, provided such procedures are consistent with Oklahoma law and Board policy.

Nothing in this policy shall authorize an investment or financial transaction prohibited by federal or state law.

REFERENCES: 70 O.S. § 5-115; 62 O.S. §§ 646.2-646.8, as applicable; 62 O.S. §471; Oklahoma Constitution, Article X, § 19; Oklahoma Cost Accounting System (OCAS), current edition.

APPROVED: July 8, 1991; October 21, 1993; September 14, 1998

REVISED: April 17, 2000; September 19, 2005; September 14, 2026

APPROVED: July 8, 1991; October 21, 1993; September 14, 1998

REVISED: April 17, 2000; September 19, 2005; September 14, 2026

5.4 – 1.0 SCHOOL RAFFLES

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

Groups Allowed to Conduct Raffles on School Property

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

Prior Approval of Raffles Required

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

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

General Requirements

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

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

No staff member or student shall be coerced or forced to participate in any raffle-related activity. All tickets remain the responsibility of the sponsoring organization with accountability to the school’s principal.

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

Information Printed on Tickets

The following information must be printed on the raffle ticket:

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

Records of Raffle Activity

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

1. Name of raffle winner(s) and respective prize(s), including the fair market value of the prize;
2. Total raffle tickets sold;
3. Total gross receipts;
4. Details of expenses related to the activity;
5. Net proceeds (gross proceeds minus expenses); and
6. Details of the expected use of the profits from the activity.
7. If the fair market value of the prize is \$600.00 or more, then the school must also obtain and keep for its records the social security number of the prize winner and his/her address.

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

Federal Taxation Issues

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

ADOPTED: September 19, 2005

5.4 – 1.0 SCHOOL RAFFLES

The Board of Education permits District schools, affiliated student groups, and qualified parent-teacher organizations to conduct raffles when authorized by and conducted in accordance with Oklahoma law, Board policy, and District procedures.

Approval

Raffles conducted by or on behalf of the District shall serve a legitimate educational, student activity, school, or charitable purpose and shall receive prior approval in accordance with the District's fundraising and activity fund procedures.

The Superintendent or designee shall establish procedures for approval and administration of raffles.

Raffle Tickets and Contributions

Raffle tickets shall be issued in conjunction with voluntary contributions in accordance with 21 O.S. § 1051.

The sponsoring organization may establish and advertise a contribution amount associated with a raffle ticket or number of raffle tickets, consistent with applicable Oklahoma law.

Raffle tickets shall be appropriately accounted for, and the sponsoring organization shall maintain sufficient records to document raffle proceeds, expenses, prizes, and distributions.

Conduct of Raffles

Raffles shall be conducted by the qualified sponsoring organization in accordance with Oklahoma law.

No person or entity shall be hired or contracted to conduct a raffle, sell raffle tickets, or solicit contributions on behalf of the sponsoring organization except as otherwise permitted by law.

Nothing in this policy prohibits the lawful use of third-party technology or electronic services for purposes such as payment processing, ticket fulfillment, electronic raffle administration, or random-number generation when the sponsoring organization retains control of the raffle and such use is permitted by law.

Participation by students and District employees in conducting, promoting, selling tickets, or soliciting contributions for a raffle shall be voluntary.

Financial Accountability

All raffle proceeds shall be properly receipted, deposited, accounted for, and used only for the approved purpose of the raffle in accordance with applicable Oklahoma law, District activity fund requirements, and District procedures.

The Superintendent or designee shall establish appropriate administrative procedures and internal controls governing raffle approval, ticket accountability, collection and deposit of proceeds, drawings, prizes, recordkeeping, financial reporting, and applicable state and federal tax requirements.

Compliance

No raffle shall be conducted in a manner prohibited by Oklahoma or federal law. The District reserves the right to deny, suspend, or terminate any raffle that does not comply with applicable law, Board policy, or District procedures.

ADOPTED: September 19, 2005

REVISED: September 14, 2026

7.5 – 4.0 STUDENT TRANSFERS

A request for a transfer into this district initiated by or on behalf of a nonresident student will be approved or refused in accordance with this policy.

A. Inter-District Transfer Application Requests

1. Applications for transfer shall be processed in the order in which they are received and must be completed by the parent of a student on a properly completed application form specified by the State Board of Education, which can be downloaded here: <https://sde.ok.gov/student-transfers>. The term “parent” means the parent of a student or person having custody of the student as provided for in OKLA. STAT. tit. 70, § 1-113(A)(1). Upon receipt of the application, the district shall stamp the application with the time and date on which it was received to ensure that the district can review applications in the order in which they are received. The application shall also be filed with the superintendent of the district if the receiving school district is within this state or with the State Board of Education for transfers to school districts in another state.
2. Subject to the special considerations applicable to a student on an Individualized Education Program (“IEP”) pursuant to the Individuals with Disabilities Education Act (20 U.S.C. §§ 1400 et seq.) (“IDEA”) as set forth below, a transfer shall be automatically approved if a student’s resident district does not offer the grade level the student is entitled to pursue.
3. A transferring student from another school district that offers the grade the student is entitled to pursue may seek a transfer to the same grade offered by the district. The transferring student will be allowed to attend a district school site that has not exceeded its capacity of the transferring student’s grade level. If there are more than one district school sites available for the transferring student, the district retains the sole discretion to determine the school site the transferring student will attend.
4. Any child in the custody of the Oklahoma Department of Human Services in foster care who is living in the home of a student who transfers, may attend the district of the transferred student as long as the district has capacity and the child does not meet a basis for denial as set forth in this policy. Except for a student in the custody of the Oklahoma Department of Human Services in foster care, a student shall not transfer more than two (2) times per school year to one or more school districts in which the student does not reside, provided that the student may always reenroll at any time in his or her school district of residence.
5. A student who is deaf or hearing-impaired and who wishes to transfer to a school district with a specialized deaf education program may submit a transfer application at any time and may transfer to the receiving school district at any time during the school year.

6. In the event the district exceeds its capacity at all school sites for the grade level sought by the transferring student, transfer requests shall be awarded to those students whose properly completed transfer request applications were received by the district in the order in which they were received.
7. Students approved for transfer into the district in accordance with this policy shall be granted one-year transfers. Transfer students shall automatically continue to attend the district in subsequent school years unless the district denies the continued transfer in accordance with Section D of this policy. At the end of each school year, the district shall review the records of transfer students for compliance with Section D of this policy. Written notice of the district's intention to deny the continued transfer shall be given to the parent or legal guardian of the student no later than July 15.
8. A transfer shall be automatically approved if a student's parent or legal guardian is employed by the district as a teacher as per 70 O.S. § 8-113, regardless of district capacity, and so long as the student does not meet one or more of the bases for a transfer denial as set forth in this policy.
9. Any brother or sister of a student who transferred in the previous school year may attend the school district to which their sibling transferred as long as the school district has capacity in the grade level and the sibling does not meet a basis for denial as listed below.

B. Special Considerations as to Transferring Student on an IEP

Prior to approving an application for a transfer student who is a child with a disability, as defined in 34 C.F.R. § 300.8, the district shall establish (a) the availability of the appropriate program, staff, and services for the transferring student, and (b) conduct a joint conference with the IEP team at the transferring student's current school. The purpose of conducting these activities is to determine whether, at the time the transferring student's application is received, the district can provide the transferring student with a free appropriate public education in the least restrictive environment, as required by the IDEA. In the event the district exceeds its capacity at all school sites for the grade level of a transferring child with a disability, the district shall reserve a place for the transferring student in the order in which the transferring student submitted his or her properly completed application. In the event an opening occurs, a decision on the transfer will be made after consideration of the factors above.

Transfers made for the purpose of providing a free appropriate public education (FAPE) to special education students pursuant to OKLA. STAT. tit. 70, § 18-110(E) and OKLA. STAT. tit. 70, § 13-101 are not considered Open Transfers subject to this policy.

If a request to transfer a student with disabilities to a school district other than the school district of residence of the student pursuant to the Education Open Transfer Act is denied, the following provisions shall apply:

1. The parent or legal guardian of a student with disabilities or an adult student with disabilities who is age eighteen (18) or older but under the age of twenty-two (22) may appeal the denial within ten (10) days of notification of the denial to the receiving school district board of education. The receiving school district board of education shall consider the appeal at its next regularly scheduled board meeting; and
2. If the receiving school district board of education denies the appeal, the parent or legal guardian of the student with disabilities or an adult student with disabilities who is age eighteen (18) or older but under the age of twenty-two (22) may appeal the denial within ten (10) days of notification of the appeal denial to the State Board of Education. The parent or legal guardian of the student with disabilities or the adult student with disabilities shall submit to the State Board of Education and the superintendent of the receiving school district a notice of appeal on a form prescribed by the State Board of Education. The appeal shall be considered by the State Board of Education at its next regularly scheduled meeting, where the parent or legal guardian of the student with disabilities or the adult student with disabilities and a representative from the receiving school district may address the Board. The State Board of Education shall promulgate rules to establish the appeals process authorized by this subsection which shall align with rules promulgated pursuant to 70, § 8-101.2.

The district's Board of Education shall annually submit to the State Department of Education the number of transfer requests for students with disabilities approved and denied and whether each denial was based on availability of programs, staff, or services.

A student shall not be precluded from enrollment prior to residency as provided in this subsection for any of the following:

- (1) having an individualized education program or an individualized family service plan under the Individuals with Disabilities Education Act, 29 U.S.C., Section 1400 et seq.,
- (2) receiving or qualifying for special education courses or services, or
- (3) receiving or qualifying for accommodations or services under the Rehabilitation Act of 1973, 29 U.S.C., Section 504.

If the enrolling student transfers with an individualized education program (IEP), individualized family service plan (IFSP) or Section 504 plan, the district shall take the steps necessary to ensure compliance with applicable federal and state law, including the transfer of records, review of prior evaluations, completion of any required reevaluations, and implementation of comparable services prior to the student's first day of attendance.

C. Children of Active-Duty U.S. Military Members

Students who are the dependent children of a member of the active uniformed military services of the United States on full-time active duty status and students who are the dependent children of a member of the military reserve on active duty orders shall be

eligible for admission to the school district of their choice if ~~the student's he or she is a student-whose~~ parent or legal guardian is transferred or is pending transfer to a military installation within the state while on active military duty pursuant to a valid military order. Students shall be eligible if at least one parent of the student has a Department of Defense-issued identification card.

A qualifying military-dependent student shall be admitted to the district regardless of district capacity and shall not be denied admission based upon the capacity limitations established pursuant to this policy.

Students who currently reside outside of ~~a the district they-select~~ and qualify for admission ~~under this section~~ shall be treated by the ~~receiving~~ district as residing within the ~~receiving~~ district for purposes of enrollment. A parent or legal guardian transferring into the state pursuant to military orders shall provide proof of residency with the State of Oklahoma within ten (10) days of the published arrival date.

If the enrolling student is on an IEP, an individualized family service plan, or a Section 504 plan, the district shall take the necessary steps including, but not limited to, the transfer of records and any prior evaluations, the performance of reevaluations, if necessary, and meetings to ensure that comparable services are in place prior to the student's first day of school in the state.

D. Denial/Revocation of a Transfer Request

1. A transferring student's application may be denied/revoked if the transferring student is or has been subject to discipline for any of the acts and reasons outlined in OKLA. STAT. tit. 70, § 24-101.3(A)-(C) & (E). A transferring student's application shall be denied/revoked for any of the acts and reasons outlined in OKLA. STAT. tit. 70, § 24-101.3(F)(1) until such time as the district determines that the transferring student no longer poses a threat to self, other students, or district faculty or employees.
2. A transferring student's application may be denied/revoked if the transferring student has ten or more absences in one semester that are not excused due to illness or for the reasons provided for in OKLA. STAT. tit. 70, § 10-105(B).
3. A transfer application submitted on behalf of a student who is eligible under the Individuals with Disabilities Education Act (IDEA) shall be denied/revoked if, as of the time the application is received, the district determines that it cannot provide the transferring student with a free appropriate public education (FAPE) in the least restrictive environment as required by the IDEA.
4. A transferring student's application will not be considered if incomplete and will be denied/revoked if the parent makes a fraudulent, intentional, or material misrepresentation on the application.
5. The denial/revocation of a transfer request from a student seeking a transfer shall

be provided in writing to the parent, as defined in OKLA. STAT. tit. 70, § 1-113(A)(1). Proof of the date of mailing or transmission of the denial by electronic means shall constitute proof of communication of the denial to the parent.

6. The district shall not accept, deny, or revoke any transfer application based on the student's race, color, sex, pregnancy, gender, gender expression or identity, national origin, religion, disability, veteran status, sexual orientation, age, genetic information, income level, disabling condition, proficiency in the English language, measure of achievement, aptitude, athletic ability, or any other classification protected by applicable federal or state law. Failure to approve a transfer pursuant to this policy shall not be deemed a discriminatory action.

E. Transfer Application Notifications

1. The district shall prominently post on its website the dates on which it will begin accepting transfer applications for the current and upcoming school year.
2. The district shall approve or deny the transfer application and notify the parent or legal guardian of the student within thirty (30) days of receiving an application.
3. If the district accepts a transfer application, the parent or legal guardian of the student must provide written notification to the district that the student will be enrolling within ten (10) days of receiving notice that the transfer application was approved. Failure of the parent or legal guardian to notify the district may result in cancellation of the approved transfer for that school year. If the parent or legal guardian fails to notify the district that the student will be enrolling, and the district chooses to cancel the transfer, the district shall provide written notice of the cancellation to the parent or legal guardian of the student immediately upon cancellation.
4. If the district receives notice that a student will be transferring, the district shall notify the student's resident school district within ten (10) days of receiving notice of the acceptance of the transfer.

F. Determination of Grade Level Capacity

The Superintendent of Schools, or the Superintendent's designee, shall determine the criteria to be used in determining grade capacities for each school site, including the capacity for any full-time virtual education program offered by the district. The district's grade-level capacity determinations shall be maintained as Exhibit A to this policy. Each school site's grade level capacity and the capacity of any full-time virtual education program offered by the district shall be (a) approved by the board of education prior to the first day of January, April, July, and October of each school year, and (b) published in a prominent place on the District's website and reported to the State Department of Education.

G. Appeal of Denial of Transfer

A parent may appeal the denial of a transfer application so long as the appeal is made

within ten (10) calendar days of the notification of the written denial. If a timely appeal is made, the appeal shall be considered by the district's board of education at its next regularly scheduled meeting. The appeal shall be considered by the board of education only upon the written submissions of the district and the parent. Such written submissions shall state, at the minimum, the following in a statement not exceeding two pages in length:

- a. The date of the parent's transfer application;
- b. The reasons for the denial by the district of the transfer application;
- c. The factual basis of the district or parent as to why the transfer application was/was not properly denied; and
- d. The criteria set forth in this policy as to propriety of the denial of the transfer application.

The Board of Education may meet in executive session, as permitted by the Oklahoma Open Meeting Act, to review the appeal to protect the privacy interests of the student. Any vote to affirm or reverse the denial shall be taken in open session.

If the Board of Education denies the parent's appeal for an inter-district transfer application, the parent or legal guardian may appeal that decision to the Oklahoma State Board of Education within ten (10) calendar days of notification of the denial. The parent shall submit to the State Board of Education and the Superintendent of the district a notice of appeal on a form prescribed by the State Board of Education. The appeal shall be considered by the State Board of Education at its next regularly scheduled meeting, where the parent and a representative from the district may address the Board.

H. District Reporting to the Oklahoma State Department of Education

1. Prior to the first day of January, April, July and October of each school year, the district shall report to the State Department of Education the capacity of the grade level of each district school site.
2. Prior to the first day of January, April, July, and October of each school year, the superintendent of schools of the district shall report to the State Department of Education a statement showing the names of the students granted transfers to the district, the resident school district of the transferred students, and the transfer student's grade level.
3. At the frequency required by the Oklahoma State Department of Education, the district shall also submit to it (a) the number of student transfers approved and denied, and (b) whether each denial was based on capacity, the acts and reasons outlined in OKLA. STAT. 70, § 24-101.3, or a history of absences in the last full school semester that were not excused due to illness or for the reasons provided

for in OKLA. STAT. 70, § 10-105(B).

I. Intra-District Transfers

Beginning July 1, 2024, a student *may* transfer between school sites within the district at any time during the year unless the student's grade level has reached capacity at the receiving site. The district's capacity determinations are attached hereto as Exhibit A.

Students who receive approval for an intra-district site transfer in accordance with this policy shall be granted one-year transfers. Transfer students shall automatically continue to attend their chosen school site in subsequent school years unless the district denies the continued transfer (i.e., revokes the transfer) in accordance with Section D of this policy. At the end of each school year, the district shall review the records of intra-district transfer students for compliance with Section D of this policy.

Excepting a student in Department of Human Services foster care, a student shall not transfer more than two times per school year, but a student may always re-enroll at any time at the student's site of residence.

For grade levels with limited capacity, the district shall give preference and reserve capacity to the following students submitting an intra-district transfer request. Following the acceptance of these students, the district will approve transfer requests in the order they were received.

1. Students who reside in the school site boundary.
2. Students who attended the school site the prior year.
3. Siblings of students who are already enrolled at the school site.
4. Children of school district employees who wish to attend a different school site within the school district.
5. Students who change residence within a school district and who wish to attend the same school site.

The district will approve an intra-district transfer request for the following students at any time during the school year:

1. Any child in the custody of the Department of Human Services and living in foster care who resides in the home of another student who transfers intra-district may attend the school site to which the student transferred.

A student's intra-district transfer request may be denied or revoked for any reason outlined in Section D of this policy (Denial/Revocation of a Transfer Request).

Notwithstanding any other provision of this policy, transfer requests submitted on behalf of dependent children of active-duty members of the United States Armed Forces or reserve component members serving on active-duty orders shall be processed in accordance with applicable Oklahoma law governing military student transfers and shall not be denied solely because the receiving school site's grade level has reached capacity.

The denial by the district of an intra-district transfer request shall be final and not appealable.

Reference: OKLA. STAT. tit. 70, §§ 8-101.1, 8-101.2, 8-103, 8-103.1, 8-103.2, 8-103.1v2 B
OKLA. STAT. tit. 70, § 18-110(E)
OKLA. STAT. tit. 70, § 8-113
OKLA. STAT. tit. 70, § 13-103(B)
OKLA. STAT. tit. 70, § 13-101
O.A.C. 210: 10-1-18
OKLA. STAT. tit. 70, § 1-114
OKLA. STAT. tit. 70, § 8-114

ADOPTED: September 19, 2005

REVISED: August 21, 2006; December 10, 2012; September 9, 2013; October 13, 2014;
September 14, 2015; October 14, 2019; October 11, 2021; December 13, 2021; October 8, 2022;
March 6, 2023, September 11, 2023, June 26, 2024, September 8, 2025, July 13, 2026,
September 14, 2026