

**WACO INDEPENDENT SCHOOL DISTRICT
REGULAR MEETING
WISD Conference Center
115 S 5th Street
Waco, Texas 76701**

Thursday, June 29, 2023 - 6:00 PM

A Regular Meeting of the Board of Trustees of Waco Independent School District will be held June 29, 2023, beginning at 6:00 PM in the WISD Conference Center, 115 S 5th Street, Waco, Texas.

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

Unless removed from the consent agenda, items identified within the consent agenda will be acted on at one time.

AGENDA

1. **Call to Order**
2. **Public Comments on Agenda Items**
3. **Moment of Silence and Pledge of Allegiance**
4. **Special Recognitions**
 - 4.A. Pledge Leaders
 - 4.B. National History Day Contest Winners
 - 4.C. Greater Waco Chamber Waco Under 40
 - 4.D. Community Partner Award
5. **Superintendent's Report**
 - 5.A. Summer School
 - 5.B. Summer Professional Development
 - 5.C. Summer Projects
 - 5.D. G.W. Carver Middle School Board Tours
6. **Information Items/Reports**
 - 6.A. Monthly and Quarterly Financial Reports for the Period Ended May 31, 2023
 - 6.B. Report on Gifts to Waco ISD
 - 6.C. First Reading of Board Policy DH (LOCAL)
 - 6.D. Intent to Apply for Federal Every Student Succeeds Act (ESSA) Funds
7. **Consent Agenda: Consider and Take Appropriate Action**
 - 7.A. Amendments to the 2022-2023 Budget
 - 7.B. Bid Award for Educational Software for Virtual and Distant Learning and other Miscellaneous Software
 - 7.C. Bid Award for Library and Media Supplies & Equipment
 - 7.D. Bid Award for Educational Consulting, Professional Development, and Other Student-Based Contracted Services

- 7.E. Bid Award for Maintenance Supplies, Equipment, and Services
- 7.F. Bid Renewal for Auctioneer Services
- 7.G. Bid Renewal for Courier Services
- 7.H. Bid Renewal for Security Patrol Services
- 7.I. 2023-2024 Memorandum of Understanding with EOAC Head Start
- 7.J. Dual Credit Partnership Agreement, Memorandum of Understanding for P-TECH, Memorandum of Understanding for College Prep Mathematic and English Language Arts, and Addendum to Dual Credit Memorandum of Understanding
- 7.K. Cooper Foundation Trustee Election
- 7.L. Purchases over \$50,000 Under Pre-Existing Bid, Purchasing Cooperative, or Allowed Professional Service
- 7.M. Low Attendance Waivers
- 7.N. Approval of Administrator Contracts
- 7.O. Retention Bonuses for Special Education and Other Campus Support Professionals, Athletic Trainers, and Registered Nurses
- 7.P. Allowance Expenditure Authorization #6 to Change the Building Automation System Supplier/Installer for the New Waco High School
- 7.Q. Board of Trustees Meeting Minutes
 - 7.Q.1. Special Meeting - May 16, 2023
 - 7.Q.2. Regular Meeting - May 18, 2023
- 8. **Review and Discuss the Sale of Unlimited Tax Building Bonds, Series 2023**
Presenter: Sheryl Davis
- 9. **Review and Discuss the Texas Association of School Boards (TASB) Pay Maintenance Study**
Presenter: Jennifer Barton, Texas Association of School Boards
- 10. **Review and Discuss Budget Update**
Presenter: Sheryl Davis
- 11. **Consider, Discuss and Take Appropriate Action Regarding Indian Spring Middle School and G.W. Carver Middle School Consolidation, Closure and Renaming**
Presenter: Dr. Susan Kincannon
- 12. **Consider, Discuss and Take Appropriate Action on the Schematic Design of South Waco Elementary School and Receive an Update on the Design Development of Kendrick Elementary**
Presenter: Gloria Barrera
- 13. **Review and Discuss Technology Services Update**
Presenter: Jerry Allen
- 14. **Consider, Discuss and Take Appropriate Action Regarding Designation of a Delegate and an Alternate for the 2023 Texas Association of School Boards (TASB) Delegate Assembly**
Presenter: Stephanie Korteweg
- 15. **Announcements**
- 16. **Consideration of Personnel**
 - 16.A. Deliberate the Appointment, Employment, Evaluation, Reassignment, Duties, Discipline, or Dismissal of a Public Officer or Employee
 - 16.B. Hear a Complaint or Charge Against an Officer or Employee
- 17. **Adjournment**

Waco Independent School District
Board of Trustees Meeting Agenda Item

Date: June 29, 2023

Contact Person: Alice Jauregui

RE: Special Recognitions

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Background Information:

Pledge Leaders

Each month, one campus selects two students to lead the Pledge of Allegiance at the regular business meeting of the Waco ISD Board of Trustees. For the month of June, Ajalae Jefferson and Zaneria Hughes from Cesar Chavez Middle School were selected for this honor.

National History Day

In April 2023, Katarina Telep, Emma Clark-Martinez, and Finley Ritter secured a spot at the National History Day competition. The contest was held at the University of Maryland, College Park, from June 11 through June 15.

Congratulations to Telep, Clark-Martinez, and Ritter who won 3rd place, out of 74 teams, in the National History Day Junior Group Performance for their performance of "*Is There a Doctor in the House? The Tale of Dr. Sara Josephine Baker and Typhoid Mary!*"

Greater Waco Chamber Waco Under 40

The Greater Waco Chamber recently announced the 2023 Waco Under 40 nominees. Waco Under 40 is an opportunity for the best and brightest from a diverse group of professions and causes to gather and receive much-deserved recognition. The program recognizes rising young leaders who have distinguished themselves in their careers and in the community. Nominees are evaluated using these criteria:

- Career Achievement
- Community Service
- Involvement, Innovation and Leadership

Mountainview Elementary School Principal Cari Detlefsen was named a Waco Under 40 nominee by the Greater Waco Chamber of Commerce. Nominees represent not only the young leaders who demonstrate a tremendous positive impact in their respective industries, but who also go beyond the call of duty by volunteering their personal time to give back to the community.

Detlefsen, one of 14 Honorees from a group of 45 Nominees, will be recognized at a celebration event scheduled for November 16, at Bird Kultgen Ford.

Community Partner Award

Each month, Waco ISD recognizes a community partner making a difference for students with the Waco ISD Award for Outstanding Community Partners. The recognition celebrates the theme for the 2022-2023 school year “Lead from the Heart” and acknowledges the impact that our community partners make in the lives of our students and staff.

In June, the district is recognizing the Waco Housing Authority for their continued partnership with Waco ISD. During the pandemic, President and CEO Milet Hopping and a team of Waco ISD administrators met to determine the best course of action for our students that live in the Estella Maxey, Kate Ross, and South Terrace Recreational Center complexes. As Waco ISD was moving forward with our one-to-one initiative to assist with remote instruction, the Waco Housing Authority volunteered to offer our students a Waco ISD safe and filtered WIFI connection through their existing internet services. These services gave our students the ability to have reliable and Children's Internet Protection Act compliant access to educational resources during an unprecedented period of our lives when many were reliant on the internet. Students who reside in these locations are still receiving internet services via this partnership today. We are thankful for the Waco Housing Authority and look forward to a continued partnership for student success.

Fiscal Implications:

None

Administration Recommendations:

For discussion only

Waco Independent School District

Board of Trustee Meeting Agenda Item

Date: June 29, 2023

Contact Person: Sheryl Davis

RE: Monthly and Quarterly Financial Reports for the Period Ended May 31, 2023

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Background Information:

Attached are the compiled May monthly financial reports for the following:

- General Fund
- Food Service Fund
- Debt Service Fund
- Internal Services Fund

Also attached are the quarterly reports for the following:

- Tax Collection Report
- Cash and Investment Report
- Cash Flow Projection

These interim financial statements have been prepared utilizing data generated from the automated financial system and do not include any information related to other special revenue funds, capital projects funds, or trust and agency funds. Balances included in the report are unaudited and may change as a result of final year end closing entries and audit activities.

Fiscal Implications:

None.

Administrative Recommendations:

The Administration recommends that the Board of Trustees accept the monthly and quarterly financial reports for the period ended May 31, 2023, as presented.



**Waco Independent School
District
Business & Support Services**

Sheryl Davis
Chief Finance Officer

P.O. Box 27, Waco, Texas 76703
Phone: 254-755-9440

June 22, 2023

Board of Trustees
Waco Independent School District
Waco, Texas

The accompanying balance sheets, statements of revenues, expenditures and changes in fund balance, and encumbrances and expenditures by fund, function and object for the month ending May 31, 2023 have been compiled for the General Fund, Food Service Fund, Debt Service Fund, and Internal Services Fund. Final cash reconciliation procedures and financial audit activities may result in additional adjustments to the May financial statements. These preliminary financial reports are prepared utilizing the following assumptions:

Revenue:	Recorded on a cash basis with adjustments to accrual basis made at August 31, 2023.
Expenditure:	Totals on the "Statement of Revenues, Expenditures and Changes in Fund Balance" include expenditures occurring during the interim period reported. Balances will be adjusted to accrual basis at August 31, 2023. Outstanding encumbrances are included on the "Encumbrances and Expenditures by Fund, Function, and Object" schedule, only.
Beginning Fund Balance:	Represents August 31, 2022 audited ending fund balance.

I have not performed an audit or review of these financial statements. Please do not hesitate to call if you have any questions or need further assistance.

Sheryl Davis
Chief Finance Officer

Comparison of Fiscal Year 2022-2023 Revenues and Expenditures to Previous Fiscal Year as of May 31, 2023

Variations in revenues and expenditures as compared to the previous year are primarily due to the cyclical nature of budgetary receipts and expenditures. The larger variances are explained in this summary.

General Fund

Revenues:

5710 Local Property Taxes – Collections as of the end of May have increased \$10,961,363 over last year. However, as a percent of estimated revenue, lag last year's by approximately 3.0%. This difference in collections as a percent of budget results from cumulative value adjustments in the current year compared to last year. As shown on the quarterly Tax Collection Report, included in this month's agenda, we have experienced a cumulative decrease in values of \$65 million compared to an increase last year in values of \$259 million.

5740 Other Local Revenue – Revenues have decreased \$7.2 million from last year. This is primarily attributable to the expiration of the District's participation in the Tax Increment Fund which decreased both revenues and expenditures (shown in function 97) by \$6.3 million. Other revenue decreases include \$1.7 million in insurance recoveries received last year and the \$1.4 million refund from the expiration of the Tax Increment Reinvestment Zone #2. This decrease in revenue is partially offset by an increase in earnings on investments of \$2.2 million.

5750 Extracurricular Activities – Revenues from extracurricular activities, primarily athletics, continue to be down from the prior year, decreasing \$116,730.

5760 Intermediate Source Revenue – The District received its second payment on the \$2.5 million that the County has pledged to reimburse the District for the rebuild of Paul Tyson Stadium. Because the County began to service the debt incurred in building its new facilities from the venue taxes collected, the excess amount available to pay the City and Waco ISD was greatly reduced from 2022. Waco ISD received a payment of \$1.0 million last year and only \$310,435 this year. I have requested an anticipated repayment schedule from the County. Based on the schedule provided, the District will receive three more payments averaging \$357,000 and a final payment in 2027 of approximately \$92,000. The payment schedule estimates revenue increases for the venue of 3% each year. If the increase in revenue is higher, as anticipated, the pay back will be accelerated.

5810 Per Capita and Foundation School Program Revenue – Revenue has decreased \$3.4 million from last year. Revenue reflects near final settlement payments due to the Texas Education Agency for the 2021-2022 fiscal year of \$4.9 million. Revenue projections, based on attendance data for the first five six weeks and state Comptroller's estimated property values, indicate that Foundation School Program revenue will be \$5.3 million less than budget estimates. This is due to a continued loss in enrollment as well as a lower than pre-COVID average daily attendance rate. The loss in revenue for the current school year will be partially offset by \$1.7 million received from an appeal of our 2021 property values. This revenue estimate currently does not include the \$1.3 million that the District will receive in September for the Teacher Incentive Allotment which is included as an amendment for Board approval at tonight's meeting.

Functional Expenditures:

Expenditures in the functional categories appear to be consistent with last year's spending pattern with the exceptions shown below.

11 Instruction – The decrease of \$1.4 million is primarily due to the reductions in staff due to enrollment losses and the elimination of instructional aides to accommodate salary increases.

12 Instructional Resources & Media – Expenditures have decreased \$427,310. This is a result of professional librarian and instructional media staff being funded through federal stimulus grants with an accompanying reduction of library aides in the general fund.

13 Curriculum & Instructional Staff Development – The decrease in expenditures of \$470,423 is due to a decrease in the instructional specialist positions to fund supplemental instructional teachers funded in function 11.

34 Student Transportation – The increase of \$402,665 is due in part to the annual rate increase as well as \$89,149 in white fleet purchases to assist in the transportation of homeless students.

41 General Administration – Expenditures have increased \$285,680 over last year. This increase is exclusively due to increases in payroll costs, salaries and benefits.

51 Plant Maintenance and Operations -- \$247,029 of the \$438,980 increase in expenditures is due to the increase in property insurance premiums. This increase was anticipated in developing the 2022-2023 budget.

81 Facilities Acquisition and Construction – Expenditures have decreased \$3.9 million due to the completion of the Paul Tyson Stadium project in 2021-2022.

97 Payments to Tax Increment Fund – As discussed above, the decrease of \$7.9 million is due to the expiration of the District's participation in the Tax Increment Fund.

Child Nutrition Fund

Revenues:

5750 Extracurricular Activities – Revenues generated through adult meals and catering have increased \$85,713 over last year.

5900 Federal Sources Revenue – Federal reimbursements for meals reflect a decrease of \$443,073. As a participant in the Community Eligibility Program, where all of our students are eligible for free meals, the District's percentage of reimbursement is based on direct certification from enrollment in other need-based programs for low-income students, such as SNAP, TANF, Medicaid, children in foster care or identified as homeless, migrant, or eligible for state-sponsored pre-kindergarten programs, as of April 1st. The District was reimbursed at 95% for the 2022-2023 school year rather than the 100% received for the past five years under the program. In spite of the decreased percentage, participation was back to normal and we saw an increase in breakfast and lunch reimbursements. The loss was due to two major factors. Revenue from commodities has decreased \$436,954 because we received additional commodities last year due to stimulus funding. Additionally, there was an over-accrual of revenues for the 2021-2022 school year of \$296,652 that was adjusted in the current year.

Functional Expenditures:

Expenditures in the functional categories appear to be consistent with last year's spending pattern with the exceptions shown below.

35 Food Services – Expenditures have increased \$1,372,902 over last year. The increase is due to the receipt of \$1,919,300 in equipment and vehicle purchases. Most of these purchases had been planned for the 2021-2022 fiscal year to draw down the program's excess fund balance. However, supply chain issues had delayed the purchases.

Debt Service Fund**Revenues:**

5710 Local Property Taxes – Property tax collections at the end of May have increased \$10.2 million in comparison to last year. The additional collections are due to valuation increases as well as an increase in the Interest and Sinking tax rate from \$0.22024 to \$0.298969 per \$100 of valuation. The increase in tax rate will service the newly issued debt from the 2021 bond election.

5740 Other Local Revenue – Because of the expiration of the District's participation in Tax Increment Zones 1 and 2, pass-through property tax collections for those properties have decreased \$1.3 million. This decrease in revenue is offset by a like decrease in pass-through expenditures shown in function 97. The decrease in collections is partially offset by an increase in investment income of \$404,321.

Functional Expenditures:

Expenditures in the functional categories appear to be consistent with last year's spending pattern with the exceptions shown below.

71 Debt Service – Expenditures had increased \$5.3 million over last year due to payment of interest on bonds issued in 2022.

97 Payments to Tax Increment Fund – As discussed above, expenditures have decreased \$1.3 million due to the expiration of the TIF Zone #1.

Proprietary Fund – Governmental Activities – Internal Service Fund

The District utilizes an Internal Services Fund to account for its fully-insured group health insurance plan as well as its partially self-insured workers' compensation and unemployment coverages. Internal service funds are utilized to account for the financing of goods or services provided by one organizational unit of the school district to other organizational units. It essentially facilitates the allocation of costs to all funding sources.

Operating revenues and operating expenses have been included in a detail designed to provide relevant information. Revenues from District contributions (assessments to other funds) are

distinguished from revenues from employee contributions to health insurance. Expenses detail claims payments, administrative fees, and stop-loss or excess insurance costs.

As of May 31, 2023, expenditures exceeded revenues by \$914,236, a decline of \$386,270 from last year. The decline is due to the increase in prescription drug claims of \$851,466. The following chart reflects net operations for the various programs accounted for in the fund:

Program	Revenues	Expenditures	Net
Group Health Insurance	\$ 10,406,873	\$ 11,409,951	\$ (1003,078)
Unemployment Compensation	87,310	13,372	73,938
Workers' Compensation	275,038	203,039	71,999
Wellness Programs*	0	57,094	(57,094)
Total	\$ 10,769,220	\$ 11,683,456	\$ (914,236)

*Under the terms of the agreement with Blue Cross-Blue Shield, the District receives an annual claims credit of \$150,000 to use for wellness programs.

Unemployment shows an expenditure of \$13,372 for the year. This amount is net of credits of \$5,864 due to claims audits on individuals offset by charges of \$2,206 recouped from overpayments under the federal Cares Act.

Workers' compensation claims expenditures have decreased \$82,658 from last year, the administrative fee for the program is now due at the beginning of the fiscal year rather than in monthly installments. Part of the decrease is attributable to a refund of \$27,936 of 2021-2022 premiums based on the workers' compensation payroll audit.

Reserves for estimated incurred-but-not-reported (IBNR) claims for the fully self-funded health insurance plan totaled \$675,169 for medical claims and \$46,395 for prescription drugs, at August 31, 2022. Additionally, reserves for the estimated allocated loss adjustment expense (ALAE) for the partially self-funded workers' compensation plan totaled \$300,617. The unaudited beginning net position at September 1, 2022 was \$2,992,233.

Tax Collections

Cumulative value adjustments as of May 31, 2023, have decreased the certified taxable values by \$65.0 million bringing the adjusted taxable value to \$8,692,295,672. This is an increase of \$1.2 billion over last year's adjusted value at this point in time. However, the certified values on which we based our tax rate were \$1.5 billion higher.

The number of accounts paid has decreased 48 over this time last year, current year tax collections have increased \$13.1 million while collections on prior years' levies with related penalties, interest, and attorney fees have increased \$16,994.

Taxes receivable at May 31, 2023, total \$5.4 million.

Waco Independent School District

BALANCE SHEET

GENERAL FUND

As of May 31, 2023

ASSETS

Cash and Temporary Investments	91,821,236
Property Taxes Receivable, Net of Allowance of \$2,167,519	655,211
Due from Other Governments	65,763
Accrued Interest	273,073
Due from Other Funds	3,497,057
Other Receivables	42,915
Inventories	401,456
Deferred Expenditures	525
Total Assets	<u>\$ 96,757,237</u>

LIABILITIES

Accounts Payable	1,290,345
Other Current Liabilities	29,191
Payroll Withholdings and Contributions Payable	1,293,353
Accrued Wages Payable	14,846,952
Due to Other Funds	3,381,419
Due to Other Governments	4,740,635
Total Liabilities	<u>\$ 25,581,894</u>

DEFERRED INFLOWS OF RESOURCES

Unavailable Revenues - Property Taxes	<u>\$ 655,211</u>
Total Deferred Inflows of Resources	<u>\$ 655,211</u>

FUND BALANCES

Nonspendable Fund Balance	\$ 401,981
Restricted Fund Balance	1,958,152
Committed Fund Balance	2,610,969
Unassigned Fund Balance	<u>65,549,030</u>
Total Fund Balances	<u>\$ 70,520,132</u>
Total Liabilities and Fund Balances	<u>\$ 96,757,237</u>

Waco Independent School District
STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE
BUDGET AND ACTUAL
For the Period Ended May 31, 2023

GENERAL FUND										
		(Memo)				(Memo)		Difference- Amended Budget to YTD Actual	CY YTD As % of Budget	PY YTD As % of Budget
		Monthly		Year-to-Date						
	Adopted Budget	Amended Budget	Current 5/31/2023	Prior Year 5/31/2022	Current 5/31/2023	Prior Year 5/31/2022				
REVENUES										
LOCAL SOURCES										
5710	Local Property Taxes	\$ 81,805,900	81,805,900	707,816	539,530	77,609,072	66,647,709	(4,196,828)	94.87%	97.86%
5720	Services to Other Districts	74,000	74,000	8,002	7,476	67,728	62,924	(6,272)	91.52%	69.78%
5730	Tuition & Fees	193,000	193,000	20,966	21,449	187,843	188,189	(5,157)	97.33%	221.40%
5740	Other Local Revenue	468,300	472,300	405,569	342,645	2,466,037	9,684,629	1,993,737	522.13%	92.44%
5750	Extracurricular Activities	390,400	390,400	8,567	8,646	268,426	385,156	(121,974)	68.76%	174.28%
5760	Intermediate Source (C.E.D.)	1,000,000	1,000,000	-	-	310,435	1,000,004	(689,565)	0.00%	0.00%
	Total Local Sources	\$ 83,931,600	83,935,600	1,150,919	919,746	80,909,540	77,968,611	(3,026,060)	96.39%	98.72%
STATE SOURCES										
5810	Per Capita & FSP Act	\$ 58,788,960	58,798,530	3,292,227	4,347,767	47,130,910	50,592,424	(11,667,620)	80.16%	64.60%
5820	Other State Program (TEA)	-	-	-	-	-	500	-	0.00%	0.00%
5830	Other State Program	7,165,711	7,165,711	539,621	542,173	4,868,729	5,013,209	(2,296,982)	67.94%	69.05%
	Total State Sources	\$ 65,954,671	65,964,241	3,831,848	4,889,940	51,999,639	55,606,133	(13,964,602)	78.83%	64.98%
FEDERAL SOURCES										
5900	Federal Sources Revenue	8,090,727	5,245,682	154,189	239,514	3,545,964	3,348,702	(1,699,718)	67.60%	85.67%
	Total Revenues	\$ 157,976,998	155,145,523	5,136,956	6,049,200	136,455,142	136,923,446	(18,690,381)	87.95%	81.28%
EXPENDITURES										
11	Instruction	\$ 88,908,434	87,688,662	8,087,059	8,130,615	69,881,255	71,234,217	17,807,407	79.69%	78.95%
12	Instructional Resources & Media	558,313	558,795	43,657	79,558	393,270	820,580	165,525	70.38%	76.93%
13	Curriculum & Staff Development	4,368,265	4,225,874	282,142	335,305	2,446,100	2,916,523	1,779,774	57.88%	63.52%
21	Instructional Leadership	4,131,369	4,057,157	344,691	319,021	2,817,487	2,634,461	1,239,670	69.44%	69.14%
23	School Leadership	10,144,781	10,424,069	1,011,064	920,185	7,922,993	7,686,927	2,501,076	76.01%	74.87%
31	Guidance, Counseling & Evaluation	5,785,954	5,979,987	589,449	548,547	4,602,556	4,391,841	1,377,431	76.97%	83.86%
32	Social Work Services	806,369	759,524	72,059	76,899	564,249	601,894	195,275	74.29%	63.23%
33	Health Services	1,501,102	1,528,102	152,287	138,576	1,243,423	1,192,579	284,679	81.37%	76.35%
34	Student Transportation	3,761,600	5,281,802	(5,052)	59,561	2,371,304	1,968,639	2,910,498	44.90%	43.87%
35	Food Services	-	-	428,994	-	-	38,290	-	0.00%	0.00%
36	Extracurricular Activities	5,686,449	5,801,620	537,992	425,495	4,283,680	4,392,514	1,517,940	73.84%	76.70%
41	General Administration	7,323,927	7,461,097	1,179,385	520,932	4,863,366	4,577,686	2,597,731	65.18%	65.29%
51	Plant Maintenance & Operations	17,617,917	19,793,811	175,698	1,262,556	12,901,906	12,462,926	6,891,905	65.18%	58.79%
52	Security & Monitoring Services	2,765,386	2,906,197	160,769	186,471	1,963,290	1,924,958	942,907	67.56%	66.76%
53	Data Processing Services	4,289,383	3,303,854	71,001	186,268	2,708,753	2,925,939	595,101	81.99%	75.25%
61	Community Services	487,519	681,606	27,363	58,225	530,598	383,154	151,008	77.85%	58.86%
71	Debt Service	345,000	345,000	5,922	-	237,955	-	107,045	0.00%	0.00%
81	Facilities Acquisition & Construction	-	601,957	-	-	430,919	4,336,447	171,038	0.00%	0.00%
93	Shared Services Arrangements	345,000	445,000	68,517	-	-	-	445,000	0.00%	0.00%
95	Juvenile Justice Program	650,000	650,000	-	-	566,543	471,879	83,457	87.16%	67.41%
97	Payments to Tax Increment Fund	25,000	25,000	-	34,017	(34,295)	7,855,269	59,295	-137.18%	96.58%
99	Other Intergovernmental Charges	808,424	832,984	-	-	619,781	527,450	213,203	74.40%	64.30%
	Total Expenditures	\$ 160,310,192	163,352,098	13,232,996	13,282,231	121,315,133	133,344,173	42,036,965	74.27%	74.09%
	Excess (Deficiency) of Revenues Over (Under) Expenditures	\$ (2,333,194)	(8,206,575)	(8,096,040)	(7,233,031)	15,140,009	3,579,273	23,346,584		
OTHER FINANCING SOURCES (USES)										
7900	Other Sources	-	126,194	-	-	126,194	-	(0)		
8900	Other Uses	(1,030,292)	(1,030,292)	-	-	-	-	(1,030,292)		
	Total Other Financing Source (Uses)	\$ (1,030,292)	(904,098)	-	-	126,194	-	(1,030,292)		
	Total Changes in Fund Balances	\$ (3,363,486)	(9,110,673)	(8,096,040)	(7,233,031)	15,266,203	3,579,273	24,376,876		
Fund Balances, Beginning		41,078,214	55,253,929			55,253,929	53,543,235	-		
Fund Balances, Ending		\$ 37,714,728	46,143,256			70,520,132	57,122,508	24,376,876		

Waco Independent School District
EXPENDITURES AND ENCUMBERED FUNDS BY FUNCTION AND MAJOR OBJECT
GENERAL FUND
For the Period Ended May 31, 2023

							(Memo)	
		Payroll	Purchased &	Supplies &	Other	Debt	Capital	Total
		Costs	Contracted	Materials	Operating	Services	Outlay	Year-to-Date
		6100	6200	6300	6400	6500	6600	5/31/2023
								6000
								6000
11	Instruction	\$ 65,015,713	2,497,418	2,977,845	568,744		131,659	71,191,378
12	Instructional Resources & Media	339,380	35,145	25,388	4,098			404,011
13	Curriculum & Staff Development	2,086,012	233,668	56,594	202,309			2,578,583
21	Instructional Leadership	2,472,580	153,631	89,758	178,950			2,894,919
23	School Leadership	7,635,999	93,903	146,629	138,301			8,014,832
31	Guidance, Counseling & Evaluation	4,321,507	237,586	30,259	35,959			4,625,311
32	Social Work Services	550,769	1,809	5,783	8,290			566,650
33	Health Services	1,223,284	2,977	18,865	2,886			1,248,012
34	Student Transportation		3,105,983	423,125	(43,557)		89,950	3,575,501
35	Food Services							-
36	Co/Extracurricular Activities	2,506,344	579,518	647,186	868,851		89,082	4,690,980
41	General Administration	3,648,350	763,413	224,507	348,800		-	4,985,070
51	Plant Maintenance & Operations	5,917,450	5,999,000	1,235,738	1,037,489		279,447	14,469,124
52	Security & Monitoring Services	1,305,240	475,970	222,231	14,071		222,195	2,239,706
53	Data Processing Services	1,254,266	280,413	1,207,106	29,830		79,764	2,851,379
61	Community Services	223,160	292,535	17,189	7,567			540,449
71	Debt Service					237,955		237,955
81	Facilities Acquisition & Construction						497,239	497,239
95	Juvenile Justice Program				566,543			566,543
97	Payments to Tax Increment Fund				(34,295)			(34,295)
99	Other Intergovernmental Charges		619,781					619,781
Total Expenditures & Encumbered Funds		\$ 98,500,052	15,372,748	7,328,204	3,934,835	237,955	1,389,335	126,763,128
								141,154,171

Waco Independent School District
BALANCE SHEET
CHILD NUTRITION FUND
As of May 31, 2023

ASSETS

Cash and Temporary Investments	\$ 5,328,228
Due from Other Governments	2,188,478
Accrued Interest	17,430
Due from Other Funds	224,256
Total Assets	<u>\$ 7,758,392</u>

LIABILITIES

Accounts Payable	\$ 1,040,829
Accrued Wages Payable	361,355
Total Liabilities	<u>\$ 1,402,184</u>

FUND BALANCES

Restricted Fund Balance	\$ 6,356,208
Total Fund Balances	<u>\$ 6,356,208</u>
Total Liabilities and Fund Balances	<u>\$ 7,758,392</u>

Waco Independent School District
STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE
BUDGET AND ACTUAL
For the Period Ended May 31, 2023

CHILD NUTRITION FUND

		Adopted Budget	Amended Budget	(Memo)		(Memo)		Difference- Amended Budget to YTD Actual	CY YTD As % of Budget	PY YTD As % of Budget
				Monthly		Year-to-Date				
				Current 5/31/2023	Prior Year 5/31/2022	Current 5/31/2023	Prior Year 5/31/2022			
REVENUES										
LOCAL SOURCES										
5740	Other Local Revenue	\$ 32,000	32,000	(104)	(324)	25,285	3,241	(6,715)	79.01%	12.96%
5750	Extracurricular Activities	403,000	403,000	52,447	32,497	448,240	362,527	45,240	111.23%	89.98%
	Total Local Sources	\$ 435,000	435,000	52,343	32,173	473,525	365,768	38,525	108.86%	85.48%
STATE SOURCES										
5820	Other State Program (TEA)	\$ -	-	-	-	173,594	-	173,594	0.00%	0.00%
	Total State Sources	\$ -	-	-	-	173,594	-	173,594	0.00%	0.00%
FEDERAL SOURCES										
5900	Federal Sources Revenue	\$ 9,485,099	9,573,543	1,106,713	1,057,428	9,449,264	9,892,337	(124,279)	98.70%	108.22%
	Total Revenues	\$ 9,920,099	10,008,543	1,159,057	1,089,601	10,096,383	10,258,105	87,840	100.88%	107.20%
EXPENDITURES										
35	Food Services	\$ 10,978,538	12,686,159	1,429,386	876,544	9,511,981	8,139,079	3,174,178	74.98%	61.11%
	Total Expenditures	\$ 10,978,538	12,686,159	1,429,386	876,544	9,511,981	8,139,079	3,174,178	74.98%	61.11%
	Excess (Deficiency) of Revenues Over (Under) Expenditures	\$ (1,058,439)	(2,677,616)	(270,329)	213,057	584,402	2,119,026	3,262,018		
OTHER FINANCING SOURCES (USES)										
7900	Other Sources	-	-	-	-	95,520	-	95,520		
8900	Other Uses	-	-	-	-	-	-	-		
	Total Other Financing Sources (Uses)	\$ -	-	-	-	95,520	-	95,520		
	Total Changes in Fund Balances	\$ (1,058,439)	(2,677,616)	(270,329)	213,057	679,922	2,119,026	3,357,538		
	Fund Balances, Beginning	2,758,147	5,676,286			5,676,286	4,698,491	-		
	Fund Balances, Ending	\$ 1,699,708	2,998,670			6,356,208	6,817,517	3,357,538		

Waco Independent School District
EXPENDITURES AND ENCUMBERED FUNDS BY FUNCTION AND MAJOR OBJECT
CHILD NUTRITION FUND
For the Period Ended May 31, 2023

							(Memo)
							Total
							Year-to-Date
							5/31/2022
							6000
							6000
							6000
35	Food Services	\$ 2,475,609	4,453,797	1,354,424	9,026	1,919,300	10,212,156
	Total Expenditures & Encumbered Funds	\$ 2,475,609	4,453,797	1,354,424	9,026	1,919,300	10,212,156

Waco Independent School District
BALANCE SHEET
DEBT SERVICE FUND
As of May 31, 2023

ASSETS

Cash and Temporary Investments	\$ 20,557,882
Property Taxes Receivable, Net of Allowance of \$480,335	143,226
Due from Other Governments	<u>2,215</u>
Total Assets	<u><u>\$ 20,703,324</u></u>

LIABILITIES

Due to Other Funds	\$ 16,231
Due to Other Governments	<u>-</u>
Total Liabilities	<u><u>\$ 16,231</u></u>

DEFERRED INFLOWS OF RESOURCES

Unavailable Revenues - Property Taxes	<u>\$ 143,226</u>
Total Deferred Inflows of Resources	<u><u>\$ 143,226</u></u>

FUND BALANCES

Restricted Fund Balance	<u>\$ 20,543,866</u>
Total Fund Balances	<u><u>\$ 20,543,866</u></u>
Total Liabilities and Fund Balances	<u><u>\$ 20,703,324</u></u>

Waco Independent School District
STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE
BUDGET AND ACTUAL
For the Period Ended May 31, 2023

DEBT SERVICE FUND

			(Memo)		(Memo)		Difference- Amended Budget to YTD Actual	CY YTD As % of Budget	PY YTD As % of Budget	
Adopted Budget	Amended Budget	Monthly		Year-to-Date						
		Current 5/31/2023	Prior Year 5/31/2022	Current 5/31/2023	Prior Year 5/31/2022					
REVENUES										
LOCAL SOURCES										
5710	Local Property Taxes	\$ 24,654,348	24,654,348	219,621	116,015	24,509,016	14,329,151	(145,332)	99.41%	96.27%
5740	Other Local Revenue	25,000	25,000	85,263	15,231	415,487	1,672,432	390,487	1661.95%	157.10%
	Total Local Sources	\$ 24,679,348	24,679,348	304,883	131,246	24,924,503	16,001,583	245,155	100.99%	100.33%
STATE SOURCES										
5820	Other State Program (TEA)	\$ 221,700	221,700	-	-	576,413	286,169	354,713	260.00%	0.00%
	Total State Sources	\$ 221,700	221,700	-	-	576,413	286,169	354,713	260.00%	0.00%
	Total Revenues	\$ 24,901,048	24,901,048	304,883	131,246	25,500,916	16,287,752	599,868	102.41%	100.19%
EXPENDITURES										
71	Debt Service	\$ 24,896,048	24,896,048	(9,500)		8,971,546	3,704,708	15,924,502	36.04%	22.86%
97	Payments to Tax Increment Fund	5,000	5,000	-	7,314	(8,261)	1,352,502	13,261	-165.23%	126.32%
	Total Expenditures	\$ 24,901,048	24,901,048	(9,500)	7,314	8,963,285	5,057,210	15,937,763	36.00%	29.27%
	Total Changes in Fund Balances	\$ -	-	314,383	123,932	16,537,632	11,230,542	16,537,632		
	Fund Balances, Beginning	4,816,349	4,006,234			4,006,234	4,866,235	-		
	Fund Balances, Ending	\$ 4,816,349	4,006,234			20,543,866	16,096,777	16,537,632		

Waco Independent School District
Statement of Net Position
Proprietary Fund
As of May 31, 2023

	Governmental Activities ----- Internal Service Fund
Assets	
Current assets:	
Due from other funds	3,198,732
Other receivables	59
Total Assets	<u>\$ 3,198,791</u>
Liabilities	
Current liabilities:	
Accounts payable	\$ 20,964
Other current liabilities	<u>1,099,830</u>
Total current liabilities	<u>\$ 1,120,794</u>
Total liabilities	<u>\$ 1,120,794</u>
Net position	
Unrestricted net position	<u>\$ 2,077,997</u>
Total net position	<u><u>\$ 3,198,791</u></u>

Waco Independent School District
Statement of Revenues, Expenses, and Changes in Net Position
Budget and Actual
For the Period Ended May 31, 2023

Proprietary Fund
Governmental Activities - Internal Service Fund

	Budget	(Memo)		(Memo)		Difference Budget to Current Year-to-Date	CY YTD As % of Budget	PY YTD As % of Budget
		Monthly		Year-to-Date				
		Current 5/31/2023	Prior Year 5/31/2022	Current 5/31/2023	Prior Year 5/31/2022			
Operating revenues:								
Employee contributions:								
Group health	\$ 3,631,100	287,718	\$ 294,973	2,560,882	\$ 2,508,223	(1,070,218)	70.53%	82.67%
Assessments to other funds:								
Group health	10,236,500	806,128	798,220	7,372,939	7,200,347	(2,863,561)	72.03%	73.47%
Unemployment	112,000	9,271	19,108	87,310	175,070	(24,690)	77.96%	112.95%
Workers compensation	358,000	29,136	19,612	275,038	182,668	(82,962)	76.83%	79.42%
Prescription drug rebates	1,187,000	261,222	479,556	473,052	952,582	(713,948)	39.85%	110.77%
Insurance recovery	-	-	2,681	-	40,876	-	0.00%	0.00%
Total operating revenues	\$ 15,524,600	1,393,474	1,614,150	10,769,220	11,059,766	(4,755,380)	69.37%	78.56%
Operating expenses:								
Administrative fees	\$ 1,344,000	116,731	20,064	1,011,458	863,151	332,542	75.26%	56.05%
Claims expense:								
Medical claims	9,431,000	612,178	809,737	5,991,310	6,548,166	3,439,690	63.53%	91.54%
Prescription drug claims	3,928,000	382,448	354,482	3,435,625	2,584,159	492,375	87.46%	65.82%
Unemployment	102,000	1,894	12,710	13,372	79,185	88,628	13.11%	42.80%
Workers compensation	260,000	16,176	36,889	99,766	182,424	160,234	38.37%	68.84%
Stop-loss insurance	1,739,000	123,167	243,734	1,074,831	1,268,170	664,169	61.81%	78.04%
Wellness Program	67,000	586	10,735	57,094	62,477	9,906	85.21%	115.70%
Total operating expenses	\$ 16,871,000	1,253,181	1,488,351	11,683,457	11,587,732	5,187,543	69.25%	78.57%
Change in net position	\$ (1,346,400)	140,293	125,799	(914,236)	(527,966)	432,164		
Net position:								
Net position, beginning	\$ 3,187,944			2,992,233	3,564,375	(195,711)		
Net position, ending	\$ 1,841,544			2,077,997	3,036,409	236,453		

Waco Independent School District
Statement of Cash Flows
For the Period Ended May 31, 2023

Proprietary Fund		
		Governmental Activities Internal Service Fund
Cash flows from operating activities:		
Cash received from employee contributions	\$	287,718
Cash received from assessments to other funds		704,241
Cash payments for claims		(1,012,697)
Cash payments for stop loss premiums		(123,167)
Cash payments for professional and contracted services		(116,731)
Net cash provided by operating activities	\$	0
Net increase in cash and cash equivalents	\$	0
Cash and cash equivalents at beginning of year		-
Cash and cash equivalents at end of year	\$	0
Reconciliation of operating income to net cash provided by operating activities:		
Operating gain (loss)	\$	140,293
Effects of increases and decreases in current assets and liabilities:		
Decrease in receivables		37,258
Decrease in accounts payable		(177,551)
Decrease in current liabilities		(907)
Net cash provided by operating activities	\$	0

Waco Independent School District
TAX COLLECTION REPORT
For the Quarter Ended May 31, 2023

	Year-to-Date	
	Current	Prior Year
	5/31/2023	5/31/2022
Certified Taxable Value	\$ 8,757,329,270	\$ 7,261,923,785
Cumulative Value Adjustments	(65,033,598)	258,944,156
Adjusted Taxable Value	\$ 8,692,295,672	\$ 7,520,867,941
Tax Rate	\$ 1.241869	\$ 1.244640
Paid Accounts	40,484	40,532

	Quarter		Year-to-Date	
	Current	Prior Year	Current	Prior Year
	5/31/2023	5/31/2022	5/31/2023	5/31/2022
Collections:				
Current Year	\$ 3,638,369	\$ 2,231,705	100,666,026	87,582,185
Prior Years	132,122	179,675	495,744	363,549
Penalties & Interest	441,609	258,949	908,583	879,506
Other	79,005	72,736	245,795	390,073
Total Collections	\$ 4,291,106	\$ 2,743,065	102,316,148	89,215,313
Disbursements:				
Payments to Tax Increment Fund	\$ (1,676)	\$ (14,893)	48,540	(45,383)
Attorney Fees	(79,005)	(72,736)	(245,795)	(390,073)
Appraisal Commission Fees	(411)	(374)	(1,650)	(2,346)
Total Disbursements	\$ (81,092)	\$ (88,003)	(198,905)	(437,802)
Net Cash Inflow	\$ 4,210,013	\$ 2,655,062	102,117,243	88,777,511

Collections as a Percent of Original Levy:

Current Collections	3.5%	2.6%	96.3%	102.3%
Total Collections	3.6%	2.8%	96.8%	102.7%

	Current Year's Levy	Prior Years' Levies	Total
Taxes Receivable at Period End:			
Beginning Balance	\$ -	3,446,292	3,446,292
Tax Levy	104,503,899	-	104,503,899
Levy Adjustments	(871,025)	(488,209)	(1,359,234)
Levy Paid	(100,666,026)	(495,744)	(101,161,770)
Ending Balance	\$ 2,966,848	2,462,339	5,429,187



**Waco Independent School
District
Business & Financial Services**

Sheryl Davis
Chief Finance Officer

P.O. Box 27, Waco, Texas 76703
Phone: 254-755-9440

June 22, 2023

Board of Trustees
Waco Independent School District
Waco, Texas

Following is the quarterly summary of cash and investments held by the school district as of May 31, 2023. As of that date, the District had approximately \$21.4 million in on demand deposits at Extraco Bank. Another \$26.0 million was deposited in other FDIC insured investments including: \$3.6 million in the Texas Range Certificate of Deposit program, \$10.3 million in a TFNB Insured Deposit Program, and \$12.1 million in a Landing Rock Funds account. The Landing Rock Fund is a liquid investment alternative that combines no risk (100% FDIC insured) with a higher yield than we were achieving through the insured cash shelter account. The District's investments in public funds investment pools totaled \$362.4 million.

Additionally, the District had \$17.7 million invested in the Texas TERM program, these investments are record at net asset value, and \$994,590 invested in a government agency security with the Federal Home Loan Mortgage Corporation (Freddie Mac). As of the end of February, the District had net unrecognized gains in fair value of \$129,049. Accrued interest on investments totaled \$460,529.

Total cash and investments for the District as of May 31, 2023 was \$428.6 million. This is up \$48.9 million from total cash and investments at the end of the last quarter, due primarily to property tax collections. Approximately \$20.5 million of the total cash and investments is restricted for debt service, \$5.3 million for Child Nutrition Services, and \$221.0 million for capital projects funds.

Also attached is the cash flow projection for the quarter ending August 31, 2023. If you have any questions, please do not hesitate to call.

Sheryl Davis
Chief Finance Officer
Business and Financial Services

Waco Independent School District
CASH AND INVESTMENT REPORT
For the Quarter Ended May 31, 2023
REPORT OF INVESTMENT ACTIVITY

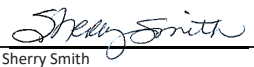
Description	Coupon or Average Rate of Return	Weighted Average Maturity or Maturity Date	Market Value 2/28/2023	Book Value 2/28/2023	Interest Earnings	Purchases & Transfers In	Sales & Transfers Out	Changes in Market Value	Market Value 5/31/2023	Book Value 5/31/2023	Accrued Interest
<u>CASH IN DEPOSITORY (EXTRACO):</u>											
Operating Revenues	0.000%		\$ 3,932,493	\$ 3,932,493	\$ -				\$ 6,502,349	\$ 6,502,349	\$ -
Accounts Payable	0.000%		8,422,292	8,422,292	-				9,141,037	9,141,037	-
Payroll	0.000%		782,590	782,590	-				201,694	201,694	-
District Activity	0.050%		745,402	745,402	109				994,383	994,383	-
Child Nutrition Services	0.050%		4,021,709	4,021,709	527				4,330,645	4,330,645	-
High Yield Money Market	2.380%		252,327	252,327	1,296				253,623	253,623	-
Capital Projects 2022	0.000%		4,287,508	4,287,508	-				24,446	24,446	-
Total Cash in Depository (Extraco)			22,444,320	22,444,320	1,932				21,448,178	21,448,178	-
<u>FDIC INSURED INVESTMENTS:</u>											
Texas Range-Certificate of Deposit Program											
General Fund			2,431,000	2,431,000	-	\$ 1,901,000	\$ (744,000)	\$ -	3,588,000	3,588,000	42,080
Child Nutrition Services			244,000	244,000	-	-	(244,000)	-	-	-	-
Landing Rock-FDIC Insured Deposit Program											
General Fund	4.650%		8,755,002	8,755,002	96,707	-	-	-	8,851,708	8,851,708	-
Debt Service Fund	4.650%		3,243,993	3,243,993	35,833	-	-	-	3,279,825	3,279,825	-
TFNB-FDIC Insured Deposit Program	2.500%		7,165,369	7,165,369	71,562	-	-	-	7,236,931	7,236,931	-
TFNB-FDIC Insured Deposit Program	2.500%		3,057,892	3,057,892	30,540	-	-	-	3,088,432	3,088,432	-
Total Other FDIC Insured Investments			24,897,256	24,897,256	234,641	1,901,000	(988,000)	-	26,044,897	26,044,897	42,080
<u>PUBLIC FUNDS INVESTMENT POOLS</u>											
LONE STAR: (S&P Rating = AAAM)											
Corporate Overnight Plus Fund	5.230%	31	1,032,490	1,032,490	13,162	-	-	-	1,045,652	1,045,652	-
Government Overnight Fund											
General Fund	5.040%	17	20,252,361	20,252,361	343,913	9,765,303	-	-	30,361,577	30,361,577	-
Capital Projects 2022	5.040%	17	176,253,305	176,253,305	1,964,302	-	(34,559,366)	-	143,658,240	143,658,240	-
TEXAS CLASS: (S & P AAAM)											
General Fund	5.195%	43	5,017,992	5,017,992	64,045	-	-	-	5,082,037	5,082,037	-
Capital Projects 2022B	5.195%	43	76313808.62	76,313,809	974,002	-	-	-	77,287,811	77,287,811	-
TEXASDAILY: (S&P Rating = AAAAM)											
General Fund	5.300%	26	534,187	534,187	4,619	11,484,063.57	(11,903,666.75)	-	119,203	119,203	-
Child Nutrition Services	5.300%	26	6,473	6,473	114	249,246	-	-	255,834	255,834	-
Capital Projects 2023	5.300%	26	-	-	177,765	80,000,000	-	-	80,177,765	80,177,765	-
TEXPOOL: (S&P Rating = AAAAM)											
General Fund	5.004%	22	23,551,440	23,551,440	179,761	27,900,294	(44,436,801)	-	7,194,695	7,194,695	-
Debt Service Fund	5.004%	22	15,431,652	15,431,652	199,892	1,596,949	-	-	17,228,492	17,228,492	-
Total for Public Funds Investment Pools			318,393,708	318,393,708	3,921,575	130,995,856	(90,899,833)	-	362,411,305	362,411,305	-
Total Cash and Cash Equivalents			365,735,283	365,735,283	4,158,148	132,896,856	(91,887,833)	-	409,904,380	409,904,380	42,080
<u>INVESTMENTS by Net Asset Value (NAV)</u>											
Texas Term Dec 23-General Fund	0.989%	5/1/2023	9,820,000.00	9,820,000	-	-	(10,000,000)	180,000	-	-	251,934
Texas Term Dec 23-General Fund	0.989%	5/15/2023	244,143.17	244,143	-	-	(248,618)	4,475	0	0	5,948
Texas Term Dec 23-General Fund	0.989%	8/3/2023	589,200.00	589,200	-	-	-	4,200	593,400	593,400	8,576
Texas Term Dec 23-Child Nutrition	0.989%	8/25/2023	736,500.00	736,500	-	-	-	5,250	741,750	741,750	11,216
Texas Term Dec 23-General Fund	0.989%	8/25/2023	2,946,000.00	2,946,000	-	-	-	21,000	2,967,000	2,967,000	66,253
Texas Term Dec 23-General Fund	0.989%	10/5/2023	491,000.00	491,000	-	-	-	3,500	494,500	494,500	10,062
Texas Term Dec 23-General Fund	0.989%	11/16/2023	1,473,000.00	1,473,000	-	-	-	10,500	1,483,500	1,483,500	22,809
Texas Term Dec 23-General Fund	0.989%	12/11/2023	1,489,011.72	1,489,012	-	-	-	10,614	1,499,626	1,499,626	7,915
Texas Term Dec 23-General Fund	0.989%	12/27/2023	-	-	-	10,000,000	-	(110,000)	9,890,000	9,890,000	5,571
Total Investments by Net Asset Value			17,788,855	17,788,855	-	10,000,000	(10,248,618)	129,539	17,669,776	17,669,776	390,283

Waco Independent School District
CASH AND INVESTMENT REPORT
For the Quarter Ended May 31, 2023
REPORT OF INVESTMENT ACTIVITY

Description	Coupon or Average Rate of Return	Weighted Average Maturity or Maturity Date	Market Value 2/28/2023	Book Value 2/28/2023	Interest Earnings	Purchases & Transfers In	Sales & Transfers Out	Changes in Market Value	Market Value 5/31/2023	Book Value 5/31/2023	Accrued Interest
SEPARATELY INVESTED ASSETS											
Federal Home Loan Mortgage Corporation	5.200%	5/17/2024	995,080	995,080	-	-		(490)	994,590	994,590	28,167
Total for Separately Invested Assets			995,080	995,080	-	-	-	(490)	994,590	994,590	28,167
Total Investments			18,783,935	18,783,935	-	10,000,000	(10,248,618)	129,049	18,664,366	18,664,366	418,450
Total Cash, Cash Equivalents, and Investments			\$ 384,519,218	\$ 384,519,218	\$ 4,158,148	\$ 142,896,856	\$ (102,136,452)	\$ 129,049	\$ 428,568,746	\$ 428,568,746	\$ 460,529

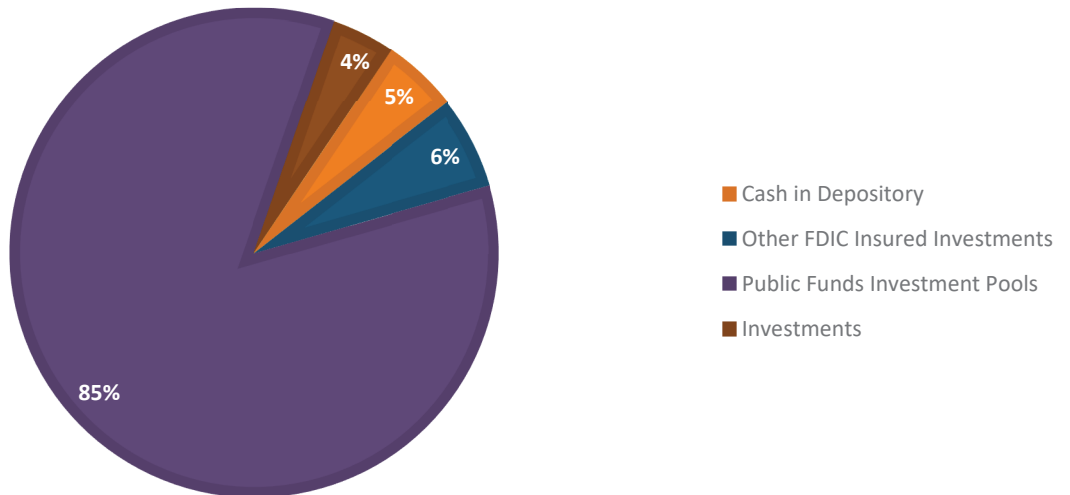
*We believe the data presented for the quarter ended November 30, 2022 are accurate in all material respects, and are presented in a manner that fairly sets forth the investment standing of the Waco Independent School District.
This report was prepared in compliance with the Waco Independent School District's Investment Policy and the Public Funds Investment Act of the State of Texas.*


Sheryl Davis
Chief Financial Officer
6/22/2023
Date

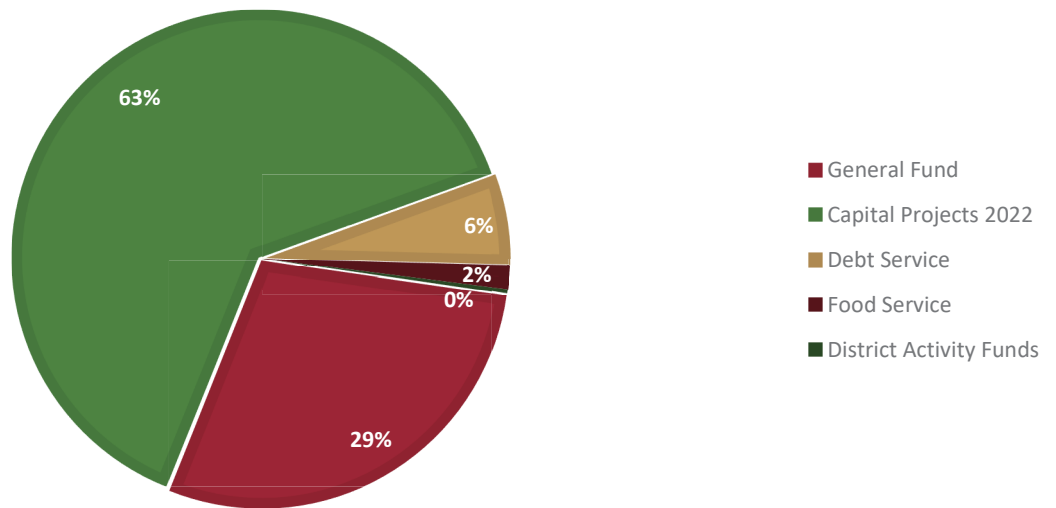

Sherry Smith
Executive Director of Finance
6/22/2023
Date


Clara Eppel
Accounting Director
6/22/2023

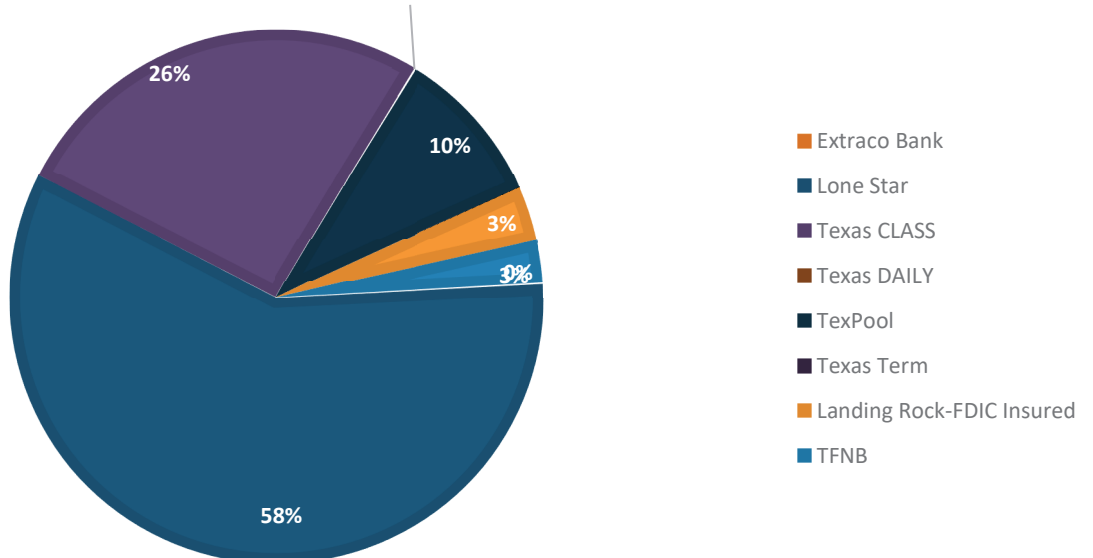
PORTFOLIO COMPOSITION BY INVESTMENT



PORTFOLIO COMPOSITION BY FUND



INTEREST EARNINGS BY ISSUER



Waco Independent School District
CASH FLOW PROJECTIONS
For the Quarter Ended May 31, 2023

	June	July	August
Cash and Cash Equivalents, Beginning Balance	\$ 409,904,380	\$ 398,341,637	\$ 384,083,165
Tax Revenue	684,541	485,576	507,150
Investment Earnings Revenue	1,386,049	1,386,049	1,386,049
Other Local Revenue	1,225,838	1,767,679	1,686,073
State Revenue	11,384,861	9,454,267	4,660,149
Federal Revenue	4,742,893	2,014,103	6,813,047
Payroll Disbursements	(7,447,528)	(7,445,006)	(7,717,743)
Accounts Payable Disbursements	(23,539,398)	(21,921,141)	(26,896,431)
Cash and Cash Equivalents, Ending Balance	<u>\$ 398,341,637</u>	<u>\$ 384,083,165</u>	<u>\$ 364,521,460</u>

2022 Actual Tax Collections (Net of TIF Pass-through)

	Current Year's Levy	Prior Years' Levy	Penalty & Interest	Total
September, 2021	\$ -	\$ (179,099)	\$ 31,970	\$ (147,128)
October	2,892,352	93,615	34,900	3,020,866
November	5,457,405	(9,836)	24,663	5,472,232
December	22,357,116	65,709	23,147	22,445,972
January, 2022	31,602,541	74,156	30,551	31,707,248
February	21,920,072	36,809	273,139	22,230,020
March	1,179,272	74,701	115,568	1,369,542
April	458,967	62,576	35,305	556,848
May	593,467	27,198	74,883	695,548
June	453,266	35,038	93,086	581,390
July	350,526	(19,141)	81,022	412,407
August	317,202	41,537	71,990	430,730
Total Collections	<u>\$ 87,582,185</u>	<u>\$ 303,263</u>	<u>\$ 890,226</u>	<u>\$ 88,775,674</u>

2023 Actual and Projected Tax Collections

	Current Year's Levy	Prior Years' Levy	Penalty & Interest	Total
September, 2022	\$ -	\$ 140,658	\$ 67,511	\$ 208,169
October	2,405,005	16,499	50,889	2,472,393
November	6,064,468	24,342	29,592	6,118,402
December	29,575,689	105,818	28,628	29,710,135
January, 2023	41,731,543	61,096	15,652	41,808,291
February	17,250,952	15,209	274,702	17,540,864
March	2,168,485	39,932	201,950	2,410,367
April	695,920	56,761	121,616	874,296
May	773,964	35,430	118,043	927,437
June	533,685	41,255	109,602	684,541
July	412,716	(22,537)	95,397	485,576
August	373,481	48,907	84,763	507,150
Total Collections	<u>\$ 101,985,908</u>	<u>\$ 563,369</u>	<u>\$ 1,198,344</u>	<u>\$ 103,747,621</u>

Waco Independent School District

Board of Trustee Meeting Agenda Item

Date: June 13, 2023

Contact Person: Stephanie Hines

RE: Report on Gifts to Waco ISD

=====

Background Information (Gifts >\$50,000 for Board Approval):

No gifts valued over \$50,000 were reported for the **June 2023** report.

Fiscal Implications (All Gifts):

A total of **\$20,945.14** in cash, items, and services donated to Waco ISD was recorded **April through June 2023**.

Administrative Recommendation(s):

Report only.

Date	Name	Cash	Item	Service	Total	Description	Campus
2/10/2023	Blanek's Custom Catering		\$ 150.00		\$ 150.00	Food and Drinks	University
3/13/2023	New Road Church of Christ		\$ 200.00		\$ 200.00	Food for volunteer students and staff the the VITA Tax Program	University
3/13/2023	Baylor University		\$ 140.00		\$ 140.00	Food and Drinks	University
3/17/2023	The Heir's Table		\$ 146.90		\$ 146.90	Food for volunteer students and staff the the VITA Tax Program	University
3/17/2023	Vanessa Holmes	\$ 25.00			\$ 25.00	Donation for PE Equipment - Cookie dough fundraiser without purchase	West Avenue
3/20/2023	Marysol Robles	\$ 8.00			\$ 8.00	Donation for PE Equipment - Cookie dough fundraiser without purchase	West Avenue
3/20/2023	LaQuan Hughes	\$ 15.00			\$ 15.00	Donation for PE Equipment - Cookie dough fundraiser without purchase	West Avenue
3/20/2023	Liliana Cruz	\$ 10.00			\$ 10.00	Donation for PE Equipment - Cookie dough fundraiser without purchase	West Avenue
3/20/2023	Michelle Krug	\$ 50.00			\$ 50.00	Donation for PE Equipment - Cookie dough fundraiser without purchase	West Avenue
3/20/2023	Manuel E. Pevia Reyes	\$ 500.00			\$ 500.00	Donation for PE Equipment - Cookie dough fundraiser without purchase	West Avenue
3/27/2023	Alliance Bank	\$ 1,000.00			\$ 1,000.00	Donation for Professional Development Meals in August	C&I Department
4/5/2023	Community Bank & Trust	\$ 1,000.00			\$ 1,000.00	Donation for Professional Development Meals in August	C&I Department
4/12/2023	Quick Trip Store	\$ 500.00	\$ 500.00		\$ 1,000.00	Donation to campus to purchase items for students and 100 \$5 gift cards for staff	University
4/20/2023	Stoughton Trailers	\$ 1,000.00			\$ 1,000.00	Donation to help with costs for student events (prom, family engagement, etc.)	ISMS/CM
4/20/2023	Sally Bledsoe	\$ 200.00			\$ 200.00	Donation to purchase end of year bikes	Mountainview
4/24/2023	Atmos Energy Corp	\$ 3,000.00			\$ 3,000.00	Teacher Appreciation Meal and use for teachers	Crestview
4/24/2023	Kristina May	\$ 36.24			\$ 36.24	Donation to cover balance over Sam's PO amount	ISMS/CM
4/27/2023	Waco Symphony Association, Inc.	\$ 4,000.00			\$ 4,000.00	Donation to Tennyson Middle School Orchestra	Fine Arts/Tennyson
5/4/2023	Andy's Frozen Custard		\$ 325.00		\$ 325.00	65 mini ice creams	Cedar Ridge
5/4/2023	Insomnia Cookies		\$ 178.00		\$ 178.00	65 individually wrapped cookies	Cedar Ridge
5/4/2023	Jeremiah's Italian Ice		\$ 105.00		\$ 105.00	70 snack size ice creams	Cedar Ridge
5/4/2023	HTeaO		\$ 72.00		\$ 72.00	12 Gallons of Tea	Cedar Ridge
5/4/2023	La Madeleine		\$ 40.00		\$ 40.00	4 \$10 gift cards	Cedar Ridge
5/4/2023	Texas Road House		\$ 200.00		\$ 200.00	5 Dinner for two gift cards	Cedar Ridge
5/4/2023	Bubba's 33		\$ 50.00		\$ 50.00	4 coupons: pizza, appetizer, burgers, and 10 \$5 off coupons	Cedar Ridge
5/4/2023	Katie's Frozen Custard		\$ 15.00		\$ 15.00	3 \$5 gift cards	Cedar Ridge
5/4/2023	Chipotle		\$ 25.00		\$ 25.00	cards: 2 free entrée & 1 free chips and queso	Cedar Ridge
5/4/2023	Top Golf		\$ 50.00		\$ 50.00	1 \$50 game play card	Cedar Ridge
5/4/2023	Luigi's of Woodway		\$ 30.00		\$ 30.00	1 \$30 gift card	Cedar Ridge
5/4/2023	DiCampi's		\$ 50.00		\$ 50.00	1 \$50 gift card	Cedar Ridge
5/4/2023	Sassee's Southern Style Eatery		\$ 25.00		\$ 25.00	1 \$25 gift card	Cedar Ridge
5/4/2023	Three Spoons		\$ 15.00		\$ 15.00	3 \$5 gift cards	Cedar Ridge
5/4/2023	Elegant Nail Salon		\$ 35.00		\$ 35.00	Gift card for 1 pedicure	Cedar Ridge
5/4/2023	Café Cappuccino		\$ 200.00		\$ 200.00	4 \$25 gift cards and 10 \$10 gift cards	Cedar Ridge
5/4/2023	Spice Village		\$ 100.00		\$ 100.00	4 \$25 gift cards	Cedar Ridge
5/4/2023	The Olive Branch		\$ 15.00		\$ 15.00	1 \$15 gift card	Cedar Ridge
5/4/2023	Walk-On's Sports Bistreaux		\$ 60.00		\$ 60.00	6 \$10 gift cards	Cedar Ridge
5/4/2023	Helberg Barbeque		\$ 200.00		\$ 200.00	10 \$20 gift cards	Cedar Ridge
5/4/2023	Portofino's		\$ 50.00		\$ 50.00	1 \$50 gift card	Cedar Ridge
5/4/2023	Logan's Roadhouse		\$ 1,105.00		\$ 1,105.00	65 coupons for free dessert & free appetizer	Cedar Ridge
5/4/2023	Be Kind Coffee		\$ 50.00		\$ 50.00	10 free drink coupons	Cedar Ridge
5/4/2023	Oh My Juice		\$ 30.00		\$ 30.00	1 \$30 gift card	Cedar Ridge
5/4/2023	Tony DiMaria's BBQ		\$ 50.00		\$ 50.00	2 \$25 gift cards	Cedar Ridge
5/4/2023	Raising Cane's Chicken Fingers		\$ 30.00		\$ 30.00	Gift/Swag Basket	Cedar Ridge
5/5/2023	American Bank	\$ 500.00			\$ 500.00	Donation to purchase lunch for New Teachers on Aug 4-5	C&I Department
5/5/2023	Late Model Restoration	\$ 500.00			\$ 500.00	Donation to purchase bikes for the end of year awards	Mountainview
5/5/2023	Harry D. Thompson	\$ 100.00			\$ 100.00	Donation to purchase bikes for the end of year awards	Mountainview
5/5/2023	Sally Bledsoe	\$ 200.00			\$ 200.00	Donation to purchase bikes for the end of year awards	Mountainview
5/19/2023	Design House Jewelry		\$ 1,459.00		\$ 1,459.00	10 Jewelry items given away to parents at the end of the year Parent and Child Together Time meeting	ISMS/CM
5/22/2023	Joey Johnson	\$ 500.00			\$ 500.00	GWAMA Scholarship	GWAMA
5/23/2023	Mazanec Construction Co.	\$ 1,000.00			\$ 1,000.00	GWAMA Scholarship	GWAMA
5/26/2023	Waco Bicycle Club	\$ 1,000.00			\$ 1,000.00	Donation to purchase bikes for the end of year awards	Mountainview
5/30/2023	Extraco Banks		\$ 100.00		\$ 100.00	1 \$100 Home Depot gift card	Mountainview
	Totals	\$ 15,144.24	\$ 5,800.90	\$0.00	\$ 20,945.14		

Waco Independent School District

Board of Trustee Meeting Agenda

Date: June 29, 2023

Contact Person: Dr. Josie Gutierrez & Dr. Daniel Lopez

RE: First Reading of Board Policy DH (LOCAL)

Background Information:

DH (LOCAL) EMPLOYEE STANDARDS OF CONDUCT was revised to better align to district expectations and practices. Employees are currently required to report to his or her immediate supervisor within three calendar days of any arrest, indictment, conviction, no contest or guilty plea, or other adjudication of any felony, and any offenses that are currently included in Policy DH.

The proposed changes to Policy DH (LOCAL) include the following new provisions:

1. Revise policy to require employees to report any misdemeanor (excluding minor traffic offenses punishable by fine only) and any offense involving moral turpitude.
2. Revise policy to require employees to report all arrests for possession or conspiracy to possess, transfer, sale, distribute, or conspire to transfer, sell, or distribute any controlled substance defined in Chapter 481 of the Health and Safety Code.
3. Include a revision to policy that requires employees report all driving while intoxicated (DWI) arrests to include both misdemeanor and felony arrests. The current policy only requires employees to report felony DWI arrests.

In summary, the new revisions provide clarity to employees to report all arrests to an immediate supervisor within three days. This expands the type of arrest from felonies to include misdemeanors as provided in the list of crimes on DH (LOCAL).

Fiscal Implications:

None

Administrative Recommendations:

This is the first reading of Board Policy DH (LOCAL). The second reading will be part of the agenda for the board's meeting on July 27, 2023.

PROPOSED REVISIONS

(see pages 1, 4, and 5)

	Each District employee shall perform his or her duties in accordance with state and federal law, District policy, and ethical standards. The District holds all employees accountable to the Educators' Code of Ethics. [See DH(EXHIBIT)] Each District employee shall recognize and respect the rights of students, parents, other employees, and members of the community and shall work cooperatively with others to serve the best interests of the District. An employee wishing to express concern, complaints, or criticism shall do so through appropriate channels. [See DGBA]
Violations of Standards of Conduct	Each employee shall comply with the standards of conduct set out in this policy and with any other policies, regulations, and guidelines that impose duties, requirements, or standards attendant to his or her status as a District employee. Violation of any policies, regulations, or guidelines, including intentionally making a false claim, offering a false statement, or refusing to cooperate with a District investigation, may result in disciplinary action, including termination of employment. [See DCD and DF series]
Weapons Prohibited	The District prohibits the use, possession, or display of any firearm, location-restricted knife, club, or prohibited weapon, as defined at FNCG, on District property at all times.
Exceptions	No violation of this policy occurs when: 1. Use or possession of a firearm by a specific employee is authorized by Board action. [See CKE series] 2. A District employee who holds a Texas handgun license stores a handgun or other firearm in a locked vehicle in a parking lot, parking garage, or other parking area provided by the District, provided the handgun or other firearm is not in plain view; or 3. The use, possession, or display of an otherwise prohibited weapon takes place as part of a District-approved activity supervised by proper authorities. [See FOD]
Electronic Communication Use with Students	A certified employee, licensed employee, or any other employee designated in writing by the Superintendent or a campus principal may use electronic communication, as this term is defined by law, with currently enrolled students only about matters within the scope of the employee's professional responsibilities.

EMPLOYEE STANDARDS OF CONDUCT

DH
(LOCAL)

Unless an exception has been made in accordance with the employee handbook or other administrative regulations, an employee shall not use a personal electronic communication platform, application, or account to communicate with currently enrolled students.

Unless authorized above, all other employees are prohibited from using electronic communication directly with students who are currently enrolled in the District. The employee handbook or other administrative regulations shall further detail:

1. Exceptions for family and social relationships;
2. The circumstances under which an employee may use text messaging to communicate with individual students or student groups;
3. Hours of the day during which electronic communication is discouraged or prohibited; and
4. Other matters deemed appropriate by the Superintendent or designee.

In accordance with ethical standards applicable to all District employees [see DH(EXHIBIT)], an employee shall be prohibited from using electronic communications in a manner that constitutes prohibited harassment or abuse of a District student; adversely affects the student's learning, mental health, or safety; includes threats of violence against the student; reveals confidential information about the student; or constitutes an inappropriate communication with a student, as described in the Educators' Code of Ethics.

An employee shall have no expectation of privacy in electronic communications with students. Each employee shall comply with the District's requirements for records retention and destruction to the extent those requirements apply to electronic communication. [See CPC]

Personal Use

All employees shall be held to the same professional standards in their public use of electronic communication as for any other public conduct. If an employee's use of electronic communication violates state or federal law or District policy, or interferes with the employee's ability to effectively perform his or her job duties, the employee is subject to disciplinary action, up to and including termination of employment.

Reporting Improper Communication

In accordance with administrative regulations, an employee shall notify his or her supervisor when a student engages in improper electronic communication with the employee.

EMPLOYEE STANDARDS OF CONDUCT

DH
(LOCAL)

Disclosing Personal Information	An employee shall not be required to disclose his or her personal email address or personal phone number to a student.
Safety Requirements	Each employee shall adhere to District safety rules and regulations and shall report unsafe conditions or practices to the appropriate supervisor.
Harassment or Abuse	An employee shall not engage in prohibited harassment, including sexual harassment, of: 1. Other employees. [See DIA] 2. Students. [See FFH; see FFG regarding child abuse and neglect.] While acting in the course of employment, an employee shall not engage in prohibited harassment, including sexual harassment, of other persons, including Board members, vendors, contractors, volunteers, or parents. An employee shall report child abuse or neglect as required by law. [See FFG]
Relationships with Students	An employee shall not form romantic or other inappropriate social relationships with students. Any sexual relationship between a student and a District employee is always prohibited, even if consensual. [See FFH] As required by law, the District shall notify the parent of a student with whom an educator is alleged to have engaged in certain misconduct. [See FFF]
Tobacco and E-Cigarettes	An employee shall not smoke or use tobacco products or e-cigarettes on District property, in District vehicles, or at school-related activities. [See also GKA]
Alcohol and Drugs / Notice of Drug-Free Workplace	As a condition of employment, an employee shall abide by the terms of the following drug-free workplace provisions. An employee shall notify the Superintendent in writing if the employee is convicted for a violation of a criminal drug statute occurring in the workplace in accordance with Arrests, Indictments, Convictions, and Other Adjudications, below. An employee shall not manufacture, distribute, dispense, possess, use, or be under the influence of any of the following substances during working hours while on District property or at school-related activities during or outside of usual working hours: 1. Any controlled substance or dangerous drug as defined by law, including but not limited to marijuana, any narcotic drug,

EMPLOYEE STANDARDS OF CONDUCT

DH
(LOCAL)

hallucinogen, stimulant, depressant, amphetamine, or barbiturate.

2. Alcohol or any alcoholic beverage.
3. Any abusable glue, aerosol paint, or any other chemical substance for inhalation.
4. Any other intoxicant or mood-changing, mind-altering, or behavior-altering drug.

An employee need not be legally intoxicated to be considered "under the influence" of a controlled substance.

Exceptions

It shall not be considered a violation of this policy if the employee:

1. Manufactures, possesses, or dispenses a substance listed above as part of the employee's job responsibilities;
2. Uses or possesses a controlled substance or drug authorized by a licensed physician prescribed for the employee's personal use; or
3. Possesses a controlled substance or drug that a licensed physician has prescribed for the employee's child or other individual for whom the employee is a legal guardian.

Sanctions

An employee who violates these drug-free workplace provisions shall be subject to disciplinary sanctions. Sanctions may include:

1. Referral to drug and alcohol counseling or rehabilitation programs;
2. Referral to employee assistance programs;
3. Termination from employment with the District; and
4. Referral to appropriate law enforcement officials for prosecution.

Notice

Employees shall receive a copy of this policy.

**Arrests, Indictments,
Convictions, and
Other Adjudications**

An employee shall notify his or her principal or immediate supervisor within three calendar days of any arrest, indictment, conviction, no contest or guilty plea, or other adjudication of the employee for any felony, any misdemeanor (excluding minor traffic offenses punishable by fine only), and any offense involving moral turpitude. The obligation to notify as set forth in the preceding sentence includes, but is not limited to, and any of the other offenses/conduct as indicated below:

1. Crimes involving school property or funds;

EMPLOYEE STANDARDS OF CONDUCT

DH
(LOCAL)

2. Crimes involving attempt by fraudulent or unauthorized means to obtain or alter any certificate or permit that would entitle any person to hold or obtain a position as an educator;
3. Crimes that occur wholly or in part on school property or at a school-sponsored activity; or
4. Crimes involving moral turpitude, which include:
 - Dishonesty; fraud; deceit; theft; misrepresentation;
 - Deliberate violence;
 - Base, vile, or depraved acts that are intended to arouse or gratify the sexual desire of the actor;
 - ~~Felony p~~ Possession or conspiracy to possess, ~~or any misdemeanor or felony~~ transfer, sale, distribution, or conspiracy to transfer, sell, or distribute any controlled substance defined in Chapter 481 of the Health and Safety Code;
 - ~~Felony d~~ Driving while intoxicated (DWI); ~~or~~
 - Acts constituting abuse or neglect under the Texas Family Code; ~~or~~
 - Acts involving public intoxication, unlawful use of controlled substances, or operating a motor vehicle under the influence of alcohol or a controlled substance.

Dress and Grooming

An employee's dress and grooming shall be clean, neat, in a manner appropriate for his or her assignment, and in accordance with any additional standards established by his or her supervisor and approved by the Superintendent.

**Capitalization
Threshold**

The capitalization threshold for purposes of classifying individual capital assets shall be ~~\$5,000~~\$5,000.

The Superintendent shall determine the capitalization threshold for a group of assets, the individual cost of which does not exceed the capitalization threshold above but for which the cost in the aggregate is significant.

~~SAFETY PROGRAM/RISK MANAGEMENT
SECURITY PERSONNEL~~

CKE
(LOCAL)

**District Police
Department**

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

**Supervisory
Authority**

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

Jurisdiction

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

Police Authority

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

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

~~District police officers shall not be assigned routine classroom discipline or administrative tasks.~~

~~SAFETY PROGRAM/RISK MANAGEMENT
SECURITY PERSONNEL~~

CKE
(LOCAL)

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

SAFETY PROGRAM/RISK MANAGEMENT
SECURITY PERSONNEL

CKE
(LOCAL)

	the pursuit exceeds the immediate or potential danger presented by the offenders remaining at large. Guidelines for high-speed pursuits shall be addressed in the department regulations manual.
Complaints	Complaints against a District police officer shall be in writing on a form provided by the District and shall be signed by the person making the complaint. In accordance with law, the District shall provide to the police officer a copy of the complaint. [See Complaints Against Peace Officers at CKEA(LEGAL)]
	Appeals regarding this complaint process shall be filed in accordance with DGBA, FNG, or GF, as appropriate.

SECURITY PERSONNEL
COMMISSIONED PEACE OFFICERS

CKEA
(LOCAL)

**District Police
Department**

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

Supervisory
Authority

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

Jurisdiction

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

Police Authority

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

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

SECURITY PERSONNEL
COMMISSIONED PEACE OFFICERS

CKEA
(LOCAL)

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

SECURITY PERSONNEL
COMMISSIONED PEACE OFFICERS

CKEA
(LOCAL)

*High-Speed
Pursuit*

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

Complaints

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

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

BUILDINGS, GROUNDS, AND EQUIPMENT MANAGEMENT
MAINTENANCE

CLB
(LOCAL)

**Integrated Pest
Management
Program**

The District is committed to following integrated pest management (IPM) guidelines as required by Chapter 1951 of the Occupations Code and Title 4, Chapter 7 of the Administrative Code in all pest control activities that take place on District property.

Definition

IPM is a pest management strategy that relies on accurate identification and scientific knowledge of target pests, reliable monitoring methods to assess pest presence, preventative measures to limit pest problems, and thresholds to determine when corrective control measures are needed. Under IPM, whenever economical and practical, multiple control tactics shall be used to achieve the best control of pests. These tactics shall ~~possibly~~ include, but are not limited to, the judicious use of pesticides.

Standards

The District's IPM program shall govern the District's use of pesticides, herbicides, and other chemical agents for the purpose of controlling pests, rodents, insects, and weeds in and around District facilities, including residential property primarily used as student housing.

IPM Coordinator

The Superintendent shall designate the IPM coordinator(s), who shall be registered with the Texas Department of Agriculture. The IPM coordinator(s) shall receive training in accordance with law and shall provide training to District employees, as necessary.

Application Time
Frame

The IPM coordinator(s), in addition to the responsibilities set out in CLB(LEGAL), shall coordinate with appropriate District administrators or other designated and trained employees regarding pesticide or herbicide applications in accordance with law. The IPM coordinator(s) shall determine when an emergency situation exists and an exception to the 48-hour notice requirement may be made.

No Unauthorized
Application

If the IPM coordinator is a licensed applicator, the IPM coordinator may apply pesticides in accordance with law. No other employee or other person or entity shall be permitted to apply a pesticide or herbicide at a District facility, including residential property primarily used as student housing, without the prior approval of the IPM coordinator and other than in the manner prescribed by law and the District's IPM program.

INSURANCE AND ANNUITIES MANAGEMENT
UNEMPLOYMENT INSURANCE

CRF
(LOCAL)

**Reasonable
Assurance**

The District shall issue letters of reasonable assurance, as appropriate, to employees in positions requiring less than 12 months of service whose services are anticipated to be needed at the beginning of the following school year. [See DCD and DCE]

FACILITIES CONSTRUCTION
COMPETITIVE BIDDING

CVA
(LOCAL)

Specifications

The Superintendent ~~or designee~~ shall ensure that detailed specifications are prepared for any construction project for which competitive bids are sought.

Bid Process

All bids shall be submitted in sealed envelopes, plainly marked with the name of the bid and the time of the bid opening. Bids shall be opened at the time specified. All interested parties shall be invited to attend the bid opening. Any bid may be withdrawn prior to the scheduled time for opening. Bids received after the specified time shall not be considered.

Bid Acceptance

The District may reject any and all bids.

Safety Record

If the District considers the safety record of bidders in determining to whom to award a contract, the safety record shall be defined as a bidder's OSHA (Occupational Safety and Health Administration) inspection logs for the last three years, a loss analysis from the bidder's insurance carrier, and a loss history covering all lines of insurance coverage carried by the bidder.

FACILITIES CONSTRUCTION
COMPETITIVE SEALED PROPOSALS

CVB
(LOCAL)

Specifications	The Superintendent -or designee shall prepare a request for proposals for any construction project for which competitive sealed proposals are sought.
Process	All proposals shall be submitted in sealed envelopes, plainly marked with the name of the proposal and the time of the deadline for submission. Proposals shall be opened at the time specified. All offerors shall be invited to attend the proposal opening. Changes in the content of a proposal, and in prices, may be negotiated after proposals are opened.
Withdrawal and Late Proposals	Any proposal may be withdrawn prior to the scheduled time for opening. Proposals received after the specified time shall not be considered.
Proposal Acceptance	The District may reject any and all proposals.
Safety Record	If the safety record of offerors is considered in selecting a proposal, the record shall be defined as an offeror's OSHA (Occupational Safety and Health Administration) inspection logs for the last three years, a loss analysis from the offeror's insurance carrier, and a loss history covering all lines of insurance coverage carried by the offeror.

COMPENSATION AND BENEFITS
COMPENSATION PLAN

DEA
(LOCAL)

	The Superintendent shall recommend an annual compensation plan for all District employees. The compensation plan may include wage and salary structures, stipends, benefits, and incentives. [See also DEAA]- The recommended plan shall support District goals for hiring and retaining highly qualified employees. The Board shall review and approve the compensation plan to be used by the District. The Board shall also determine the total compensation package for the Superintendent. [See BJ series]
Pay Administration	The Superintendent shall implement the compensation plan and establish procedures for plan administration consistent with the budget. The Superintendent or designee shall classifyclassification of each job title within the compensation plan shall be based on the qualifications, duties, and market value of the position.
Annualized Salary	The District shall pay all salaried employees over 12 months in equal monthly or bimonthlysemi-monthly installments, regardless of the number of months employed during the school year. Salaried employees hired during the school year shall be paid in accordance with administrative regulations.
Pay Increases	The Superintendent shall recommend to the Board an amount for employee pay increases as part of the annual budget. The Superintendent or designee shall determineAny pay adjustments for individual employees, shall be determined within the approved budget following established procedures.
Mid-Year Midyear Pay Increases	A contract employee's pay may be increased after performance on the contract has begun only if authorized by the compensation plan of the District or there is a change in the employee's job assignment or duties during the term of the contract that warrants additional compensation. Any such changes in pay that do not conform with the compensation plan shall require Board approval. [See DEA(LEGAL) for provisions on pay increases and public hearing requirements].]
Contract Employees	
Noncontract Employees	The Superintendent may grant a pay increase to a noncontract employee after duties have begun because of a change in the employee's job assignment or to address pay equity. The Superintendent shall report any such pay increases to the Board at the next regular meeting.
Pay During Closing	If the Board chooses to pay employees during an emergency closure for which the workdays are not scheduled to be made up at a later date, then that authorization shall be by resolution or other Board action and shall reflect the purpose served by the expenditure. [See EB for the authority to close schools].]

ADMISSIONS

FD
(LOCAL)

Persons Age 21 and Over	The District shall not admit into its public schools any person age 21 or over unless otherwise required by law.
Registration Forms	The student's parent, legal guardian, or other person having lawful control shall annually complete registration forms. A student who has reached age 18 shall be permitted to complete these forms.
Proof of Residency	At the time of initial registration and on an annual basis thereafter In accordance with administrative regulations, the parent, guardian, or other person having lawful control of the student under order of a court shall present proof of residency in accordance with administrative regulations developed by the Superintendent. The District may investigate stated residency as necessary.
Minor Living Apart Person Standing in Parental Relation	A minor student residing in the District but whose parent, guardian, or other person having lawful control under a court order does not reside in the District shall present a power of attorney or an authorization agreement as provided in Chapter 34 of the Family Code assigning responsibility for the student in all school-related matters to an adult resident of the District.
Misconduct	A minor student living apart who has engaged in misconduct that results in any of the consequences found in Education Code 25.001(d) shall not be permitted to attend a District school.
Exceptions	Based on an individual student's circumstance, the Superintendent shall have authority to grant exceptions to the requirement for a power of attorney or authorization agreement and to the exclusion for misconduct.
Extracurricular Activities	The Superintendent shall determine whether a minor student living apart is present in the District for the primary purpose of participating in extracurricular activities.
Nonresident Student in Grandparent's After-School Care	The parent and grandparent of a nonresident student requesting admission under Education Code 25.001(b)(9) shall provide to the Superintendent the required information on the grandparent's residency and complete a form provided by the District describing the extent of after-school care to be provided by the grandparent. The Superintendent shall have authority to approve or deny such admissions requests in accordance with criteria approved by the Board.
"Accredited" Defined	For the purposes of this policy, "accredited" shall be defined as accreditation by TEA, an equivalent agency from another state, or an accrediting association recognized by the commissioner of education.

ADMISSIONS

FD
(LOCAL)

**Grade-Level
Placement**

Accredited Schools

The parent, guardian, or other person having lawful control of a student enrolling in a District school from an accredited public, private, or parochial school shall provide evidence of the prior schooling outside the District. The student shall be placed initially at the grade level reached elsewhere, pending observation by the classroom teacher, guidance personnel, and the principal. On the basis of these observations and results of tests that may be administered by appropriate District personnel, the principal shall determine the final grade placement.

Nonaccredited
Schools

A student enrolling in a District school from a nonaccredited public, private, or parochial school, including a homeschool, shall be placed initially at the discretion of the principal, pending observation by classroom teachers, guidance personnel, and the principal. Criteria for placement may include:

1. Scores on achievement tests, which may be administered by appropriate District personnel.
2. Recommendation of the sending school.
3. Prior academic record.
4. Chronological age and social and emotional development of the student.
5. Other criteria deemed appropriate by the principal.

Transfer of Credit

Accredited Texas
Public Schools

Credit toward state graduation requirements earned in an accredited public school district in Texas shall be transferable and recognized by the District.

Other Accredited or
Nonaccredited
Schools

Before recognizing credit in a course earned in an accredited non-public school, an accredited school outside of Texas, or a nonaccredited school, appropriate personnel shall evaluate a student's records and transcript. The District may require the student to demonstrate mastery of the content or use alternative methods to verify course content for the award of credit.

Transition
Assistance

In accordance with law, when a student who is identified as homeless or in substitute care enrolls in the District, the District shall assess the student's available records and other relevant information to ~~determine transfer of~~ ensure credit, including proportionate credit, is awarded appropriately for all subjects and courses taken prior to enrollment.

[See EI]

Withdrawal

A parent or guardian wishing to withdraw a minor student shall present a signed statement that includes the reason for the withdrawal. A student who is 18 or older may submit a withdrawal statement without a parent's or guardian's signature.

[For District withdrawal of students no longer in attendance, see FEA(LOCAL).]

STUDENT WELFARE
FREEDOM FROM BULLYING

FFI
(LOCAL)

Note: This policy addresses bullying of District students. For purposes of this policy, the term bullying includes cyber-bullying.

For provisions regarding discrimination and harassment involving District students, see FFH. Note that FFI shall be used in conjunction with FFH for certain prohibited conduct. For reporting requirements related to child abuse and neglect, see FFG.

Bullying Prohibited

The District prohibits bullying, including cyberbullying, as defined by state law. Retaliation against anyone involved in the complaint process is a violation of District policy and is prohibited.

Examples

Bullying of a student could occur by physical contact or through electronic means and may include hazing, threats, taunting, teasing, confinement, assault, demands for money, destruction of property, theft of valued possessions, name calling, rumor spreading, or ostracism.

Minimum Standards

In accordance with law, the Superintendent shall develop administrative procedures to ensure that minimum standards for bullying prevention are implemented.

Retaliation

The District prohibits retaliation by a student or District employee against any person who in good faith makes a report of bullying, serves as a witness, or participates in an investigation.

Examples

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

False Claim

A student who intentionally makes a false claim, offers false statements, or refuses to cooperate with a District investigation regarding bullying shall be subject to appropriate disciplinary action.

Timely Reporting

Reports of bullying shall be made as soon as possible after the alleged act or knowledge of the alleged act. A failure to immediately report may impair the District's ability to investigate and address the prohibited conduct.

**Reporting
Procedures**

Student Report

To obtain assistance and intervention, any student who believes that he or she has experienced bullying or believes that another student has experienced bullying should immediately report the alleged acts to a teacher, school counselor, principal, or other District employee. The Superintendent shall develop procedures allowing a student to anonymously report an alleged incident of bullying.

STUDENT WELFARE
FREEDOM FROM BULLYING

FFI
(LOCAL)

Employee Report	Any District employee who suspects or receives notice that a student or group of students has or may have experienced bullying shall immediately notify the principal or designee.
Report Format	A report may be made orally or in writing. The principal or designee shall reduce any oral reports to written form.
Periodic Monitoring	The Superintendent shall periodically monitor the reported counts of bullying incidents, and that declines in the count may represent not only improvements in the campus culture because bullying declines but also declines in the campus culture because of a decline in openness to report incidents.
Notice of Report	When an allegation of bullying is reported, the principal or designee shall notify a parent of the alleged victim on or before the third business day after the incident is reported. The principal or designee shall also notify a parent of the student alleged to have engaged in the conduct within a reasonable amount of time after the incident is reported.
Prohibited Conduct	The principal or designee shall determine whether the allegations in the report, if proven, would constitute prohibited conduct as defined by policy FFH, including dating violence and harassment or discrimination on the basis of race, color, religion, sex, gender, national origin, or disability. If so, the District shall proceed under policy FFH. If the allegations could constitute both prohibited conduct and bullying, the investigation under FFH shall include a determination on each type of conduct.
Investigation of Report	The principal or designee shall conduct an appropriate investigation based on the allegations in the report. The principal or designee shall promptly take interim action calculated to prevent bullying during the course of an investigation, if appropriate.
Concluding the Investigation	Absent extenuating circumstances, the investigation should be completed within ten District business days from the date of the initial report alleging bullying; however, the principal or designee shall take additional time if necessary to complete a thorough investigation. The principal or designee shall prepare a final, written report of the investigation. The report shall include a determination of whether bullying occurred, and if so, whether the victim used reasonable self-defense. A copy of the report shall be sent to the Superintendent or designee.
Notice to Parents	If an incident of bullying is confirmed, the principal or designee shall promptly notify the parents of the victim and of the student who engaged in bullying.

STUDENT WELFARE
FREEDOM FROM BULLYING

FFI
(LOCAL)

District Action	If the results of an investigation indicate that bullying occurred, the District shall promptly respond by taking appropriate disciplinary action in accordance with the District's Student Code of Conduct and may take corrective action reasonably calculated to address the conduct. The District may notify law enforcement in certain circumstances.
<i>Bullying</i>	
<i>Discipline</i>	A student who is a victim of bullying and who used reasonable self-defense in response to the bullying shall not be subject to disciplinary action. The discipline of a student with a disability is subject to applicable state and federal law in addition to the Student Code of Conduct.
<i>Corrective Action</i>	Examples of corrective action may include a training program for the individuals involved in the complaint, a comprehensive education program for the school community, follow-up inquiries to determine whether any new incidents or any instances of retaliation have occurred, involving parents and students in efforts to identify problems and improve the school climate, increasing staff monitoring of areas where bullying has occurred, and reaffirming the District's policy against bullying.
<i>Transfers</i>	The principal or designee shall refer to FDB for transfer provisions.
<i>Counseling</i>	The principal or designee shall notify the victim, the student who engaged in bullying, and any students who witnessed the bullying of available counseling options.
Improper Conduct	If the investigation reveals improper conduct that did not rise to the level of prohibited conduct or bullying, the District may take action in accordance with the Student Code of Conduct or any other appropriate corrective action.
Confidentiality	To the greatest extent possible, the District shall respect the privacy of the complainant, persons against whom a report is filed, and witnesses. Limited disclosures may be necessary in order to conduct a thorough investigation.
Appeal	A student who is dissatisfied with the outcome of the investigation may appeal through FNG(LOCAL), beginning at the appropriate level.
Records Retention	Retention of records shall be in accordance with CPC(LOCAL).
Access to Policy and Procedures	This policy and any accompanying procedures shall be distributed annually in the employee and student handbooks. Copies of the policy and procedures shall be posted on the District's website, to the extent practicable, and shall be readily available at each campus and the District's administrative offices.

Instruction Sheet

TASB Localized Policy Manual Update 121

Waco ISD

Code	Type	Action To Be Taken	Note
AC	(LEGAL)	Replace policy	Revised policy
AF	(LEGAL)	Replace policy	Revised policy
AIE	(LEGAL)	Replace policy	Revised policy
BBBA	(LEGAL)	Replace policy	Revised policy
BQ	(LEGAL)	Replace policy	Revised policy
C	(LEGAL)	Replace table of contents	Revised table of contents
CBB	(LEGAL)	Replace policy	Revised policy
CCA	(LEGAL)	Replace policy	Revised policy
CCGA	(LEGAL)	Replace policy	Revised policy
CCGB	(LEGAL)	Replace policy	Revised policy
CFB	(LOCAL)	Replace policy	Revised policy
CH	(LEGAL)	Replace policy	Revised policy
CKE	(LOCAL)	DELETE policy	See explanatory note
CKEA	(LOCAL)	ADD policy	See explanatory note
CL	(LEGAL)	Replace policy	Revised policy
CLA	(LEGAL)	Replace policy	Revised policy
CLB	(LEGAL)	Replace policy	Revised policy
CLB	(LOCAL)	Replace policy	Revised policy
CMD	(LEGAL)	Replace policy	Revised policy
CNC	(LEGAL)	Replace policy	Revised policy
CO	(LEGAL)	Replace policy	Revised policy
CQ	(LEGAL)	Replace policy	Revised policy
CQA	(LEGAL)	Replace policy	Revised policy
CRF	(LOCAL)	Replace policy	Revised policy
CSA	(LEGAL)	No policy enclosed	See explanatory note
CVA	(LOCAL)	Replace policy	Revised policy
CVB	(LOCAL)	Replace policy	Revised policy
DBAA	(LEGAL)	Replace policy	Revised policy
DEA	(LOCAL)	Replace policy	Revised policy
DEAB	(LEGAL)	Replace policy	Revised policy
E	(LEGAL)	Replace table of contents	Revised table of contents
EF	(LEGAL)	Replace policy	Revised policy
EHAD	(LEGAL)	Replace policy	Revised policy
EHBAB	(LEGAL)	Replace policy	Revised policy

Instruction Sheet

TASB Localized Policy Manual Update 121

Waco ISD

Code	Type	Action To Be Taken	Note
EHBAF	(LEGAL)	Replace policy	Revised policy
EHBC	(LEGAL)	Replace policy	Revised policy
EHBCA	(LEGAL)	ADD policy	See explanatory note
EBBH	(LEGAL)	Replace policy	Revised policy
EHBI	(LEGAL)	Replace policy	Revised policy
EHBJ	(LEGAL)	Replace policy	Revised policy
EI	(LEGAL)	Replace policy	Revised policy
EKB	(LEGAL)	Replace policy	Revised policy
FD	(LEGAL)	Replace policy	Revised policy
FD	(LOCAL)	Replace policy	Revised policy
FDA	(LEGAL)	Replace policy	Revised policy
FDC	(LEGAL)	Replace policy	Revised policy
FEA	(LEGAL)	Replace policy	Revised policy
FEB	(LEGAL)	Replace policy	Revised policy
FFAF	(LEGAL)	Replace policy	Revised policy
FFC	(LEGAL)	Replace policy	Revised policy
FFI	(LEGAL)	Replace policy	Revised policy
FFI	(LOCAL)	Replace policy	Revised policy
FL	(LEGAL)	Replace policy	Revised policy
G	(LEGAL)	Replace table of contents	Revised table of contents
GB	(LEGAL)	Replace policy	Revised policy
GBA	(LEGAL)	Replace policy	Revised policy
GBAA	(LEGAL)	Replace policy	Revised policy
GRA	(LEGAL)	Replace policy	Revised policy

Explanatory Notes

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Waco ISD

AC(LEGAL)

GEOGRAPHIC BOUNDARIES

This legal policy has been revised to include additional Education Code provisions related to ways in which a district's geographic boundaries may change, such as by detachment, annexation, consolidation, and abolition.

AF(LEGAL)

INNOVATION DISTRICTS

Amended Administrative Code rules, effective October 25, 2022, revised the list of Education Code sections and administrative rules from which a district of innovation may not be exempted. Changes include a requirement to provide TEA a link to the local innovation plan posted on the district's website. Previously, the rule required the district to provide TEA with a copy of the local innovation plan.

AIE(LEGAL)

ACCOUNTABILITY: INVESTIGATIONS

Changes reflect revised Administrative Code provisions regarding compliance investigations by TEA, effective October 26, 2022. Other changes are to better reflect legal sources.

BBBA(LEGAL)

ELECTIONS: CONDUCTING ELECTIONS

Provisions regarding confidentiality of the email address and personal phone number of an election judge or clerk have been moved from GBA(LEGAL) to this code addressing elections.

BQ(LEGAL)

PLANNING AND DECISION-MAKING PROCESS

An existing requirement to include the district's bullying prevention policy and procedures in the district improvement plan has been added to this policy.

C(LEGAL)

BUSINESS AND SUPPORT SERVICES

The C section table of contents has been revised to add the new code CKED, Security Personnel: Other Security Arrangements. We have also added for future expansion new codes addressing facility standards at CSA (Safety and Security) and CSB (Gas and Pipelines).

CBB(LEGAL)

STATE AND FEDERAL REVENUE SOURCES: FEDERAL

Revisions are to better reflect legal sources.

CCA(LEGAL)

LOCAL REVENUE SOURCES: BOND ISSUES

Citations have been updated to reflect the repeal and replacement of an Administrative Code provision regarding the bond guarantee program, effective March 1, 2023. References to Administrative Code provisions regarding the instructional facilities allotment and existing debt allotment have been clarified.

CCGA(LEGAL)

AD VALOREM TAXES: EXEMPTIONS AND PAYMENTS

This policy has been revised to reflect the increased homestead exemption of \$40,000 approved by voters on May 7, 2022.

CCGB(LEGAL)

AD VALOREM TAXES: ECONOMIC DEVELOPMENT

We have added a note regarding the expiration of the Texas Economic Development Act on December 31, 2022, and the continued application of the law to limitations on appraised value in existence at that time.

Explanatory Notes

TASB Localized Policy Manual Update 121

Waco ISD

CFB(LOCAL) ACCOUNTING: INVENTORIES

Revisions regarding the capitalization threshold are based on amended guidance from *GASB Implementation Guide 2021-1*, Question 5.1, regarding the capitalization of assets with individual acquisition costs below the threshold if the assets in the aggregate are significant. The amended guidance applies to reporting periods beginning after June 15, 2023.

CH(LEGAL) PURCHASING AND ACQUISITION

We have replaced the citation to a repealed Administrative Code rule regarding purchases of automated information systems with a citation to a new rule effective December 19, 2022.

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

To better align the district's legal and local policies, provisions addressing commissioned peace officers have been relocated to CKEA(LOCAL).

CKEA(LOCAL) SECURITY PERSONNEL: COMMISSIONED PEACE OFFICERS

Provisions addressing commissioned peace officers have been relocated to this code from CKE(LOCAL). Please review the provisions for accuracy. If revisions are needed regarding other security personnel or if the district's police department has a body-worn camera program or considers one in the future, please contact your policy consultant.

CL(LEGAL) BUILDINGS, GROUNDS, AND EQUIPMENT MANAGEMENT

We have replaced the citation to repealed Administrative Code provisions regarding public pool sanitation and safety with a citation to new provisions effective January 1, 2023.

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

New Administrative Code rules, effective February 2, 2023, have been added to address required warning signs regarding human trafficking.

CLB(LEGAL) BUILDINGS, GROUNDS, AND EQUIPMENT MANAGEMENT: MAINTENANCE

Changes reflect revisions to Administrative Code rules regarding integrated pest management, effective January 16, 2023.

CLB(LOCAL) BUILDINGS, GROUNDS, AND EQUIPMENT MANAGEMENT: MAINTENANCE

Administrative Code rules regarding integrated pest management (IPM) were amended to include district-owned residential property among the district facilities subject to the IPM requirements. Although the changes to the rules add "residential property" to the buildings and grounds subject to IPM requirements, it is our understanding from the Texas Department of Agriculture that this inclusion is intended to apply only to district-owned residential property that is primarily used as student housing. As requested by TDA, revisions include such residential property among the district facilities subject to the district's IPM program.

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

An Administrative Code provision, effective June 7, 2022, has been added regarding purchasing technological equipment with the instructional materials and technology allotment.

Explanatory Notes

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Waco ISD

CNC(LEGAL) TRANSPORTATION MANAGEMENT: TRANSPORTATION SAFETY

Provisions have been added regarding the use of school bus warning signals.

CO(LEGAL) FOOD AND NUTRITION MANAGEMENT

New Administrative Code provisions were adopted regarding appeals related to federal food and nutrition programs administered by the Texas Department of Agriculture. A reference to these provisions, effective November 27, 2022, has been added.

CQ(LEGAL) TECHNOLOGY RESOURCES

A reference to Administrative Code provisions regarding management of electronic transactions and signed records has been clarified.

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

The link to the Texas Department of State Health Services Guidelines for the Care of Students with Food Allergies has been updated.

CRF(LOCAL) INSURANCE AND ANNUITIES MANAGEMENT: UNEMPLOYMENT INSURANCE

There are no significant revisions to the text on reasonable assurance; however, the policy template has been updated to accommodate the new adoption date function in Policy Online®. This policy is being issued at no charge to the district.

CSA(LEGAL) FACILITY STANDARDS: SAFETY AND SECURITY

The Commissioner of Education proposed new School Safety Requirements in the Commissioner's Rules Concerning School Facilities in November 2022. The public comment period closed December 12, 2022, but the rules are not yet finalized. The proposed rules require local policy provisions. Policy Service will include legal provisions in this new policy code and provide local policy provisions for consideration following publication of the final rules.

CVA(LOCAL) FACILITIES CONSTRUCTION: COMPETITIVE BIDDING

Policy BJA(LOCAL) authorizes the superintendent to delegate responsibilities to other employees of the district as permitted by law; thus, it is not necessary to include a reference to the superintendent's designee at Specifications. In addition, the policy template has been updated to accommodate the new adoption date function in Policy Online®. This policy is being issued at no charge to the district.

CVB(LOCAL) FACILITIES CONSTRUCTION: COMPETITIVE SEALED PROPOSALS

As noted above, policy BJA(LOCAL) authorizes the superintendent to delegate responsibilities to other employees of the district as permitted by law; thus, it is not necessary to include a reference to the superintendent's designee at Specifications. In addition, the policy template has been updated to accommodate the new adoption date function in Policy Online®. This policy is being issued at no charge to the district.

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

Changes have been made to better reflect legal sources and to delete obsolete provisions.

Explanatory Notes

TASB Localized Policy Manual Update 121

Waco ISD

DEA(LOCAL)

COMPENSATION AND BENEFITS: COMPENSATION PLAN

To eliminate the possibility of confusion about the frequency of pay, we recommend replacing *bimonthly* with the more specific and widely used *semi-monthly*. Other revisions are recommended for clarification and consistency with policy style.

The [Legal Issues in Update 121](#) memo describes common legal concerns and best practices specific to this policy's topic.

DEAB(LEGAL)

COMPENSATION PLAN: WAGE AND HOUR LAWS

Changes have been made to better reflect legal sources.

E(LEGAL)

INSTRUCTION

The E section table of contents has been updated to add the new code EHBCA, which includes provisions addressing accelerated instruction previously located at EHBC. The subtitle for policy EHBC has been changed to Compensatory Services and Intensive Programs.

EF(LEGAL)

INSTRUCTIONAL RESOURCES

Legal definitions of "harmful materials" and "obscene" have been added for ease of access.

EHAD(LEGAL)

BASIC INSTRUCTIONAL PROGRAM: ELECTIVE INSTRUCTION

A reference to Administrative Code provisions has been added regarding driver education safety program requirements.

EHBAB(LEGAL)

SPECIAL EDUCATION: ARD COMMITTEE AND INDIVIDUALIZED EDUCATION PROGRAM

Changes reflect revised Administrative Code provisions regarding students who are homeless or in substitute care, effective January 1, 2023.

EHBAF(LEGAL)

SPECIAL EDUCATION: VIDEO/AUDIO MONITORING

Revisions reflect amended Administrative Code provisions, effective January 22, 2023, pertaining to filing certain documents electronically.

EHBC(LEGAL)

SPECIAL PROGRAMS: COMPENSATORY SERVICES AND INTENSIVE PROGRAMS

Update 121 includes a reorganization of the information regarding compensatory, intensive, and accelerated instructional services. Provisions addressing accelerated instruction have been moved to the new code EHBCA. The remaining provisions at this code, now subtitled Compensatory Services and Intensive Programs, have been reordered and adjusted for clarity.

EHBCA(LEGAL)

COMPENSATORY SERVICES AND INTENSIVE PROGRAMS: ACCELERATED INSTRUCTION

This new policy addressing accelerated instruction comprises provisions moved from EHBC(LEGAL). For clarity, we have reordered and adjusted the material.

EBBH(LEGAL)

SPECIAL PROGRAMS: OTHER SPECIAL POPULATIONS

An amended Administrative Code provision, effective January 18, 2023, has been added pertaining to regional day school programs for the deaf.

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EHBI(LEGAL) SPECIAL PROGRAMS: ADULT AND COMMUNITY EDUCATION

Changes reflect revisions to Administrative Code provisions, effective November 24, 2022, regarding essential program components of adult education programs.

EHB(LEGAL) SPECIAL PROGRAMS: INNOVATIVE AND MAGNET PROGRAMS

Changes include a new Administrative Code provision, effective February 26, 2023, regarding requests for approval of an innovative course by the State Board of Education.

EI(LEGAL) ACADEMIC ACHIEVEMENT

This legal policy has been revised to replace a repealed Administrative Code rule with a new rule, effective January 1, 2023, related to awarding credit to students who are homeless or in substitute care for coursework completed prior to the student enrolling in or transferring to the district. Other changes are to better reflect legal sources.

EKB(LEGAL) TESTING PROGRAMS: STATE ASSESSMENT

Duplicative text regarding students who fail to perform satisfactorily on a state assessment instrument has been deleted and replaced with a note pointing to EHBC and EHBCA.

FD(LEGAL) ADMISSIONS

The policy has been updated to delete an Administrative Code rule repealed by the State Board of Education, effective March 9, 2023.

FD(LOCAL) ADMISSIONS

Recommended revisions to this policy at Transition Assistance reflect the repeal and replacement of an Administrative Code provision regarding awarding credit to a student who is homeless or in substitute care. Under the new rule, a district must adopt a policy to ensure credit has been awarded appropriately prior to enrollment. Other changes provide greater flexibility for the district with regard to requiring proof of residency by removing specific requirements and referring to administrative regulations.

The [Legal Issues in Update 121](#) memo describes common legal concerns and best practices specific to this policy's topic.

FDA(LEGAL) ADMISSIONS: INTERDISTRICT TRANSFERS

This policy has been reorganized for clarity. Other changes are to better match statutory wording. Notes have been added to more clearly indicate the application of certain provisions.

FDC(LEGAL) ADMISSIONS: HOMELESS STUDENTS

A note has been added to clarify that information regarding support services for students experiencing homelessness, including provisions regarding district liaisons and transition services, is located at FFC.

FEA(LEGAL) ATTENDANCE: COMPULSORY ATTENDANCE

This legal policy has been updated to remove provisions of Administrative Code rules repealed by the State Board of Education, effective March 9, 2023. A note has been added referring to the *Student Attendance Accounting Handbook* for additional guidance.

FEB(LEGAL) ATTENDANCE: ATTENDANCE ACCOUNTING

This legal policy has been updated to remove provisions of Administrative Code rules repealed by the State Board of Education, effective March 9, 2023. We have also added a note referring to the *Student*

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Attendance Accounting Handbook for additional guidance, as well as existing statutory provisions for completeness and clarification.

FFAF(LEGAL) WELLNESS AND HEALTH SERVICES: CARE PLANS

Links to the Texas Department of State Health Services' guidance for the care of students with diabetes and of students with food allergies have been updated.

FFC(LEGAL) STUDENT WELFARE: STUDENT SUPPORT SERVICES

Revisions throughout this policy reflect amended Administrative Code provisions, effective January 1, 2023, regarding transition assistance for students experiencing homelessness or in substitute care.

FFI(LEGAL) STUDENT WELFARE: FREEDOM FROM BULLYING

A note has been added with a link to the [Minimum Standards for Bullying Prevention](#) finalized by TEA on January 31, 2023.

FFI(LOCAL) STUDENT WELFARE: FREEDOM FROM BULLYING

The [Minimum Standards for Bullying Prevention](#), completed by TEA on January 31, 2023, include a requirement for policy provisions on reporting bullying incidents. Existing policy language addresses reporting by students and staff. The enclosed revisions are recommended to address the new minimum standards.

FL(LEGAL) STUDENT RECORDS

Provisions at Access, Disclosure, and Amendment, beginning on page 4, have been revised and reorganized for clarity and to better reflect legal sources. The definition of eligible student has been added. Additional reporting requirements under the National School Lunch Act or the Child Nutrition Act have also been added. A note has been added at the beginning of the policy to clarify that information regarding juvenile law enforcement records is located in GBA.

G(LEGAL) COMMUNITY AND GOVERNMENTAL RELATIONS

The G section table of contents has been revised to reflect the correct subtitle for GBA, Access to Public Information.

GB(LEGAL) PUBLIC INFORMATION PROGRAM

Update 121 includes a reorganization of the public information policies in the GB series. As part of the reorganization, we have deleted provisions that are duplicated at other policy codes and adjusted provisions for clarity and to better match statutory wording.

GBA(LEGAL) PUBLIC INFORMATION PROGRAM: ACCESS TO PUBLIC INFORMATION

As part of the reorganization of the public information policies, we have made the following changes:

- Deleted provisions that are duplicated at other policy codes and added cross-references, if necessary, to improve usability.
- Moved provisions regarding confidentiality based on statutes outside the Public Information Act (Government Code Chapter 552) to the policy code addressing the specific topic.
- Reordered and adjusted provisions for clarity and to better match statutory wording.

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GBAA(LEGAL)

ACCESS TO PUBLIC INFORMATION: REQUESTS FOR INFORMATION

As part of the reorganization of the GB series, we have made the following changes:

- Deleted provisions that are duplicated at other policy codes and added cross-references, if necessary.
- Reordered and adjusted provisions for clarity and to better match statutory wording.

GRA(LEGAL)

RELATIONS WITH GOVERNMENTAL ENTITIES: STATE AND LOCAL GOVERNMENTAL AUTHORITIES

This policy has been revised to include an Education Code provision prohibiting citation of a student alleged to have committed a school offense. Family Code definitions have also been added to support existing content regarding students taken into custody.

GEOGRAPHIC BOUNDARIES

AC
(LEGAL)

**Boundary
Descriptions and
Maps**

A district shall file with the Texas Education Agency (TEA):

1. A complete and legally sufficient description of the boundaries of the district.
2. A map of the district that is:
 - a. Drawn to the county general highway maps produced by the Texas Department of Transportation or a similar map of sufficient detail to display the names of visible features that the boundaries follow or to which the boundaries are in close proximity; and
 - b. An accurate and legible representation of the boundaries in relationship to other features on the map.
3. A list of voting precincts within the district, separately listing those precincts wholly within the district and those precincts only partly within the district.

A district shall amend the information and maps on file with TEA if the boundaries of the district change or if any other change makes the information on file incomplete or inaccurate.

Education Code 13.010

**Changes in
Boundaries**

Any change in the boundaries of a district is not effective unless approved by a majority of the board if the board's approval is required under Education Code Chapter 13. *Education Code 13.008*

**Minor Boundary
Adjustments**

Two contiguous districts may adjust their common boundary by agreement if, at the time the agreement is executed:

1. No child who resides in the territory that is transferred from one jurisdiction to the other is enrolled in a school of the district from which the territory is transferred; and
2. The taxable value of the territory that is transferred from one jurisdiction to the other does not exceed one-tenth of one percent of the total taxable value of all property in the district from which the territory is transferred. "Taxable value" is defined at Government Code 403.302.

Education Code 13.231

**Notice of Boundary
Change**

A district that changes its boundaries or the boundaries of districts used to elect members to the board shall not later than the 30th day after the date the change is adopted:

*To Voter
Registrar*

1. Notify the voter registrar of the county in which the area subject to the boundary change is located of the adopted boundary change; and

GEOGRAPHIC BOUNDARIES

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(LEGAL)

2. Provide the voter registrar with a map of an adopted boundary change in a format that is compatible with the mapping format used by the registrar's office.

Election Code 42.0615

*To County
Appraiser*

A district shall notify the appraisal office of any boundary changes within 30 days after the date of the change. *Tax Code 6.07*

**Detachment and
Annexation**

In accordance with Education Code 13.051, territory may be detached from a district and annexed to another district that is contiguous to the detached territory. A petition requesting the detachment and annexation must be presented to the board of the district from which the territory is to be detached and to the board of the district to which the territory is to be annexed. Each board to which a petition is required to be presented must conduct a hearing and adopt a resolution for the annexation to be effective. *Education Code 13.051(a)*

Immediately following receipt of the petition as required by this section, each affected board shall give notice of the contemplated change by publishing and posting a notice in the manner required for an election order under Education Code 13.003. The notice must specify the place and date at which a hearing on the matter shall be held. Unless the districts hold a joint hearing, the districts must hold hearings on separate dates. At each hearing, affected persons are entitled to an opportunity to be heard. *Education Code 13.051(g)*

For more information about detachment and annexation, see Education Code Chapter 13, Subchapter B (Detachment and Annexation).

**Detachment and
Creation**

A new district may be created by detaching territory from an existing district or existing contiguous districts and establishing a new district. A district created under Education Code Chapter 13, Subchapter C has all the rights and privileges of other independent school districts. *Education Code 13.101*

For more information about the creation of the district by detachment, including the requirement to hold an election, see Education Code Chapter 13, Subchapter C (Creation of District by Detachment).

Consolidation

By the procedure provided by Education Code Chapter 13, Subchapter D, two or more districts may consolidate into a single district. The consolidated district may include area in more than one county. *Education Code 13.151*

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For more information about the consolidation of two or more districts, including election requirements, see Education Code Chapter 13, Subchapter D (Consolidation).

Abolition

Abolition of an independent school district is initiated by a petition requesting an election on the question. The petition must be signed by a majority of the board of the district to be abolished and must be presented to the county judge of each county in which part of the independent school district is situated. *Education Code 13.202*

For more information about the abolition of the district, including election requirements, see Education Code Chapter 13, Subchapter E (Abolition).

Definitions

“District-level committee” means the committee established under Education Code 11.251, or a comparable committee if the district is exempted (or has exempted itself) from this provision.

“Innovation plan committee” means a committee appointed by the board of trustees to develop the innovation plan in accordance with statutory requirements. The district-level committee may also serve in this role.

“Public hearing” means an open meeting held by the board of trustees that allows members of the public to hear facts about the proposed plan and designation and provides the opportunity for the public to give opinions and comments on the proposed actions.

“Public meeting” means an open meeting held by the board of trustees that allows members of the public to hear facts about the proposed plan and designation.

“Unacceptable academic performance rating” means a rating of Improvement Required or Unacceptable Performance or as otherwise indicated in the applicable year's academic accountability manual.

“Unacceptable financial accountability rating” means a Financial Integrity Rating System of Texas (FIRST) rating of Substandard Achievement as indicated in the applicable year's financial accountability system manual.

19 TAC 102.1301

District of Innovation

A district is eligible for designation as a district of innovation if the district's most recent performance rating under Education Code 39.054 reflects at least acceptable performance.

A board may not vote on the final approval of the innovation plan if the district is assigned either a final or preliminary rating below acceptable performance. In the event the preliminary rating is changed, the board may then vote to become an innovation district.

Consideration of designation as a district of innovation may be initiated by a resolution adopted by the board or a petition signed by a majority of the members of the district-level committee [see BQA].

Education Code 12A.001; 19 TAC 102.1303

Public Hearing

After adopting a resolution or receiving a petition for consideration as a district of innovation, a board shall hold a public hearing as soon as possible, but not later than 30 days, to consider whether the district should develop a local innovation plan for the designation of the district as a district of innovation.

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At the conclusion of the public hearing or within 30 days after conclusion of the public hearing, the board may decline to pursue designation of the district as a district of innovation or appoint a committee to develop a local innovation plan.

The board may outline the parameters around which the innovation plan committee may develop the plan.

Education Code 12A.002; 19 TAC 102.1305

**Local Innovation
Plan**

A local innovation plan meeting all legal requirements must be developed for a district before the district may be designated as a district of innovation.

The local innovation plan must provide for a comprehensive educational program for the district, which program may include:

1. Innovative curriculum, instructional methods, and provisions regarding community participation, campus governance, and parental involvement;
2. Modifications to the school day or year [see EB, EC];
3. Provisions regarding the district budget and sustainable program funding;
4. Accountability and assessment measures that exceed the requirements of state and federal law; and
5. Any other innovations prescribed by the board of trustees.

The plan must also identify requirements imposed by the Education Code that inhibit the goals of the plan and from which the district should be exempted on adoption of the plan, subject to Education Code 12A.004. [See Exceptions, below]

The commissioner of education shall maintain a list of provisions from which designated districts of innovation are exempt. The commissioner shall notify the legislature of each provision from which districts enrolling a majority of students in this state are exempt.

Education Code 12A.003, .004(b); 19 TAC 102.1305(d)

**Prohibited
Exemptions**

A local innovation plan may not provide for the exemption of a district designated as a district of innovation from the provisions listed in Education Code 12A.004 and 19 Administrative Code 102.1309.
Education Code 12A.004; 19 TAC 102.1309

An innovation district may not be exempted from the following sections of the Education Code and the rules adopted thereunder:

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1. A state or federal requirement, imposed by statute or rule, applicable to an open-enrollment charter school operating under Education Code Chapter 12, Subchapter D, including, but not limited to, the requirements listed in Education Code 12.104(b), and:
 - a. Education Code Chapter 22, Subchapter B;
 - b. Education Code Chapter 25, Subchapter A, sections 25.001, .002, .0021, .0031, and .004;
 - c. Education Code Chapter 28, sections 28.002, .0021, .0023, .005, .0051, .006, .016, .0211, .0213, .0217, .025, .0254, .02541, .0255, .0258, .0259, and .026;
 - d. Education Code Chapter 29, Subchapter G;
 - e. Education Code Chapter 30, Subchapter A;
 - f. Education Code 30.104;
 - g. Education Code Chapter 34;
 - h. Education Code Chapter 37, sections 37.005, .006(I), .007(e), .011, .012, .013, and .020;
 - i. Education Code Chapter 39; and
 - j. Education Code Chapter 39A.
2. Education Code Chapter 11, Subchapters A, C, D, and E, except that a district may be exempt from Education Code 11.1511(b)(5) and (14) and 11.162;
3. Education Code Chapter 12, Subchapter C;
4. Education Code Chapter 12A;
5. Education Code Chapter 13;
6. Education Code Chapter 44, sections 44.0011, .002, .003, .004, .0041, .005, .0051, .006, .007, .0071, .008, .009, .011, .0312, .032, .051, .052, .053, and .054;
7. Education Code Chapter 45, sections 45.003, .0031, .005, .105, .106, .202, and .203;
8. Education Code Chapter 46;
9. Education Code Chapter 48; and
10. Education Code Chapter 49.

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In addition to the prohibited exemptions specified above, an innovation district may not be exempted from:

1. A requirement of a grant or other state program in which the district voluntarily participates;
2. Duties that the statute applies to the execution of that power if a district chooses to implement an authorized power that is optional under the terms of the statute;
3. A requirement of a grant or other state program authorized in the Education Code that would otherwise entitle the district to participation in that program; and
4. Requirements imposed by provisions outside the Education Code, including requirements under Government Code Chapter 822.

19 TAC 102.1309; Education Code 12A.004

**Adoption of Local
Innovation Plan**

The board may not vote on adoption of a proposed local innovation plan unless:

1. The final version of the proposed plan has been available on the district's website for at least 30 days;
2. The board has notified the commissioner of the board's intention to vote on adoption of the proposed plan; and
3. The district-level committee [see BQA] has held a public meeting to consider the final version of the proposed plan and has approved the plan by a majority vote of the committee members. The public meeting may occur at any time, including up to or on the same date at which the board intends to vote on final adoption of the proposed plan.

The board may adopt a proposed local innovation plan by an affirmative vote of two-thirds of the membership of the board.

On adoption of a local innovation plan, the district is designated as a district of innovation for the term specified in the plan, but no longer than five calendar years, and shall begin operation in accordance with the plan. In addition, the district is exempt from state requirements identified under Education Code 12A.003(b)(2). [See Local Innovation Plan, above]

The district shall notify the commissioner of approval of the plan along with a list of approved exemptions by completing the agency's form provided at 19 Administrative Code 102.1307(d).

A district's exemption under the plan includes any subsequent amendment or redesignation of an identified state requirement, un-

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less the subsequent amendment or redesignation specifically applies to an innovation district.

The district shall ensure that a copy of the plan is posted on the district's website in accordance with Education Code 12A.0071, for the term of the designation as an innovation district.

Education Code 12A.005; 19 TAC 102.1307

Notice to TEA

Not later than the 15th day after the date on which the board finalizes a local innovation plan either through adoption, amendment, or renewal, the district shall provide a link to the local innovation plan as posted on the district's website to the Texas Education Agency (TEA). TEA shall promptly post the current local innovation plan on the agency's website. *19 TAC 102.1307(g); Education Code 12A.0071(b)*

Term

The term of a district's designation as a district of innovation may not exceed five years and is effective upon district approval and notification of the plan to the TEA. A district may only have one innovation plan at any given time. *Education Code 12A.006; 19 TAC 102.1311*

Amendment,
Rescission, or
Renewal of Local
Innovation Plan

A local innovation plan may be amended, rescinded, or renewed if the action is approved by a vote of the district-level committee [see BQA] and a two-thirds majority vote of the board of trustees.

An amendment to an approved plan does not change the date of the term of designation as an innovation district. Exemptions that were already formally approved are not required to be reviewed.

A district must notify TEA within five business days of rescission and provide a date at which time it will be in compliance with all sections of the Education Code, but no later than the start of the following school year.

During renewal, all sections of the plan and exemptions shall be reviewed, and the district must follow all components outlined in 19 Administrative Code 102.1307 relating to Adoption of Local Innovation Plans.

The district shall notify the commissioner of any actions taken along with the associated exemptions and local approval dates.

Education Code 12A.007; 19 TAC 102.1313

Website Posting

A district designated as a district of innovation shall ensure that a copy of the district's current local innovation plan is available to the public by posting and maintaining the plan in a prominent location on the district's internet website. *Education Code 12A.0071(a); 19 TAC 102.1307(f)*

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The district's innovation plan must be clearly posted on the district's website for the term of the designation as an innovation district. *19 TAC 102.1307(f)*

**Criminal History
Background Checks**

A prohibition, restriction, or requirement imposed by Education Code Chapter 22, Subchapter C (district employee and volunteer criminal history records), applies to the same extent to a district of innovation or other charter entity.

The failure of a district of innovation to provide information required under Education Code 22.0832 (National Criminal History Record Information Review of Certain Open-Enrollment Charter School Employees) may result in termination of the district's designation as a district of innovation.

Education Code 22.0815(b)–(c)

**Termination by
Commissioner**

Discretionary
Termination

The commissioner may terminate a district's designation as a district of innovation if the district receives for two consecutive school years:

1. A final unacceptable academic performance rating under Education Code 39.054;
2. A final unacceptable financial accountability rating under Education Code 39.082; or
3. A final unacceptable academic performance rating under Education Code 39.054 for one of the school years and an unacceptable financial accountability rating under Education Code 39.082 for the other school year.

The commissioner may permit the district to amend the local innovation plan to address concerns specified by the commissioner in lieu of terminating the district's designation.

Education Code 12A.008(a)–(b); 19 TAC 102.1315(a)(1)–(a)(2)

The commissioner may terminate a district's designation as a district of innovation if the district fails to comply with the duty to discharge or refuse to hire:

1. Certain employees or applicants for employment under Education Code 12.1059;
2. Certain employees or applicants convicted of certain offenses under Education Code 22.085; or
3. Certain employees or applicants not eligible for employment in public schools under Education Code 22.092.

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	<i>19 TAC 102.1315(a)(3); Education Code 12A.008(b-1) [See DBAA, DF]</i>
Mandatory Termination	The commissioner shall terminate a district's designation as a district of innovation if the district receives for three consecutive school years: 1. A final unacceptable academic performance rating under Education Code 39.054; 2. A final unacceptable financial accountability rating under Education Code 39.082; or 3. Any combination of one or more unacceptable ratings Education Code 39.054 and one or more unacceptable ratings under Education Code 39.082.
No Appeal	<i>Education Code 12A.008(c); 19 TAC 102.1315(b)</i> The commissioner's decision to terminate a district's designation as a district of innovation is final and may not be appealed. <i>Education Code 12A.008(d); 19 TAC 102.1315(d)</i>

**Special
Investigations**

The commissioner may authorize a special investigation:

1. When excessive numbers of absences of students eligible to be tested on state assessment instruments are determined;
2. When excessive numbers of allowable exemptions from the required state assessment are determined;
3. In response to complaints to the Texas Education Agency (TEA) of alleged violations of civil rights or other requirements imposed on the state by federal law or court order;
4. In response to established compliance reviews of the district's financial accounting practices and state and federal reporting requirements;
5. When extraordinary numbers of student placements in disciplinary alternative education programs, other than placements under Education Code 37.006 and 37.007, are determined;
6. In response to an allegation involving a conflict between members of the board or between the board and the district administration if it appears that the conflict involves a violation of a role or duty of the board members or the administration clearly defined by the Education Code. If TEA's findings indicate the board has observed a lawfully adopted policy, TEA may not substitute its judgment for that of the board;
7. When excessive numbers of students in special education programs are assessed through modified assessment instruments;
8. In response to an allegation regarding, or an analysis using a statistical method result indicating, a possible violation of an assessment instrument security procedure;
9. When a significant pattern of decreased academic performance has developed as a result of the promotion in the preceding two school years of students who did not perform satisfactorily on the state assessments;
10. When excessive numbers of students eligible to enroll fail to complete an Algebra II course or any other advanced course as determined by the commissioner;
11. When resource allocation practices indicate a potential for significant improvement in resource allocation;
12. When a disproportionate number of students of a particular demographic group is graduating with a particular endorsement;

13. When an excessive number of students is graduating with a particular endorsement;
14. When a school district for any reason fails to produce, at the request of TEA, evidence or an investigation report relating to an educator who is under investigation by the State Board for Educator Certification;
15. When ten percent or more of the students graduating in a particular school year from a particular high school campus are awarded a diploma based on the determination of an individual graduation committee under Education Code 28.0258;
16. In response to a complaint with respect to alleged inaccurate data that is reported through PEIMS or through other reports required by state or federal law or rule or court order and that is used by TEA to make a determination relating to public school accountability, including accreditation, under Education Code Chapter 39;
17. In response to repeated complaints submitted to TEA concerning imposition of excessive paperwork requirements on classroom teachers; or
18. As the commissioner otherwise determines necessary.

Education Code 39.003(a), (c)

TEA shall adopt written procedures for conducting special accreditation investigations, including procedures that allow TEA to obtain information from district employees in a manner that prevents a district or campus from screening the information. *Education Code 39.004(a)*

Note: The procedures for conducting a special investigation, holding a hearing following an investigation, the process for commissioner determinations, and judicial appeal are described in Education Code 39.004–.007.

Commissioner
Action

Based on the results of a special investigation, the commissioner may:

1. Take appropriate action under Education Code Chapter 39A, [see AIC];
2. Lower the district's accreditation status or a district's or campus's performance rating; or

3. Take action under both items 1 and 2 above.

Education Code 39.003(d)

At any time before issuing a report with the TEA's final findings, the commissioner may defer taking the above action until:

1. A person who is a third party, selected by the commissioner, has reviewed programs or other subjects of a special investigation and submitted a report identifying problems and proposing solutions;
2. A district completes a corrective action plan developed by the commissioner; or
3. The completion of actions under both items 1 and 2 above.

Education Code 39.003(e)

Based on the results of an action taken above, the commissioner may decline to take the deferred action. *Education Code 39.003(f)*

Note: The procedures for an informal review or hearing following an investigation are described in 19 Administrative Code Chapter 157, Subchapter EE.

Monitoring Reviews

In accordance with Education Code 7.028(a), TEA may monitor compliance with requirements applicable to a process or program provided by a district, campus, or program, only as necessary to ensure:

1. Compliance with federal law and regulations;
2. Financial accountability, including compliance with grant requirements;
3. Data integrity for purposes of:
 - a. The Public Education Information Management System (PEIMS); and
 - b. Accountability under Education Code Chapter 39 and 39A; and
4. Qualification for funding under Education Code Chapter 48.

The board has primary responsibility for ensuring that the district complies with all applicable requirements of state educational programs.

Education Code 7.028

**Compliance
Monitoring Activities**

Districts are subject to general supervision and monitoring activities for compliance with state law and federal regulation and review of program implementation and effectiveness within certain special populations of students.

Activities may include:

1. Random, targeted, or cyclical reviews authorized under Education Code 39.056 (monitoring reviews), conducted remotely or on-site to identify problems implementing state and federal requirements and to provide support for development of reasonable and appropriate strategies to address identified problems; and/or
2. Intensive or special investigative remote or on-site reviews authorized under Education Code 39.057 (redesignated to Education Code 39.003, special investigations).

Activities described in item 1, above, are applicable for compliance with requirements for reading diagnosis in Education Code 28.006 [see EKC] and dyslexia and related disorders in Education Code 38.003 and 19 Administrative Code 74.28 [see EHB].

19 TAC 97.1071(a)–(b)

Notice

TEA shall give written notice to the superintendent and the board of trustees of any impending monitoring review. *Education Code 39.056(d)*

Conducting the
Review

A monitoring review may include desk reviews and on-site visits, including random on-site visits. In conducting a monitoring review, TEA may obtain information from administrators, other district employees, parents of students enrolled in the district, and other persons as necessary. *Education Code 39.056(c), (g)*

Converting to a
Special
Investigation

The commissioner may at any time convert a monitoring review to a special investigation under Education Code 39.003, provided the commissioner promptly notifies the district of the conversion. *Education Code 39.056(h)*

Improvements

TEA shall report in writing to the superintendent and president of the board and shall make recommendations concerning any necessary improvements or sources of aid such as regional education service centers. A district that takes action with regard to the recommendations provided by TEA shall make a reasonable effort to seek assistance from a third party in developing an action plan to improve district performance using improvement techniques that are goal-oriented and research-based. *Education Code 39.056(e)–(f)*

Appeals

A decision by the commissioner under Education Code Chapter 39 or 39A is final and may not be appealed unless an applicable provision of Chapter 39 or 39A provides otherwise. *Education Code 39A.906* [See AIC]

**Compliance
Investigation**

A compliance investigation is an investigation by TEA of a state education grant recipient to determine compliance with the statutory or rule requirements of a state education program. A compliance investigation is not a special accreditation investigation subject to Education Code 39.003 and 39.004 (above). *19 TAC 102.1401(a)(1)*

Note: If the district is subject to a court order or other binding legal determination, the district shall conduct its elections in accordance with that court order or determination, applicable law, and this policy. To the extent of any conflict, the court order or other legal determination shall prevail. [See BBB(LOCAL)]

Notice of Polling Place

Any written notice of a polling place location must state the building name, if any, and the street address, including the suite or room number, if any, of the polling place. *Election Code 1.021*

Election Order

The board shall order an election. An election to be held on a uniform election date shall be ordered not later than the 78th day before election day. *Election Code 3.004, .005*

Each election order must state:

1. The date of the election;
2. The offices or measures to be voted on;
3. The early voting clerk's official mailing address or street address at which the clerk may receive delivery by common or contract carrier, if different, phone number, email address, and internet website, if the early voting clerk has an internet website;
4. The location of the main early voting polling place;
5. The dates and hours for early voting; and
6. The dates and hours of any Saturday and Sunday early voting.

Election Code 3.006, 83.010, 85.004, .007

A board shall preserve the election order for the period for preserving the precinct election records. The date and nature of each election shall be entered in the official records of the board. For an election on a measure, the entry must include a description of the measure. *Election Code 3.008*

Failure to Order an Election

Failure to order a general election does not affect the validity of the election. *Election Code 3.007*

Election Notice

Contents

Notice of the election must state:

1. The nature and date of the election;
2. The location of each polling place;

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3. The hours the polls will be open;
4. The internet website of the authority conducting the election;
5. The early voting clerk's official mailing address or street address at which the clerk may receive delivery by common or contract carrier, if different, phone number, email address, and internet website, if the early voting clerk has an internet website;
6. The location of the main early voting polling place; and
7. The dates and hours for early voting, including the dates and hours of any Saturday and Sunday early voting.

Election Code 4.004(a), 83.010, 85.004, .007

Notice of Special
Election

The notice of a special election must also state each office to be filled or the proposition stating each measure to be voted on. *Election Code 4.004(b)*

Publication

Notice of the election shall be published at least once, not earlier than the 30th day or later than the tenth day before election day, in a newspaper published within the district's boundaries or in a newspaper of general circulation in the district if none is published within the district's boundaries. The board shall retain a copy of the published notice that contains the name of the newspaper and the date of publication. *Election Code 4.003(a)(1), (c), .005(a)*

Posting

In addition to the notice described above, not later than the 21st day before election day, a county shall post a copy of a notice of election provided to the county [see Notice to County Clerk and Voter Registrar, below], which must include the location of each polling place, on the county's internet website, if the county maintains a website. A district may post a copy of the notice on the bulletin board used for posting notices of the meetings of the board. If a county does not maintain a website, the district shall post a copy of the notice of the election on the bulletin board used for posting notice of meetings of the board. The notice must remain posted continuously through election day. The person posting the notice shall make a record at the time of posting stating the date and place of posting. The person shall sign the record and deliver it to the board after the last posting is made. *Election Code 4.003(b), .005(b)*

A district that maintains a website must post the notice described above on the internet website of the district. *Election Code 85.007(d)*

Note: For additional website posting requirements regarding the date and location of the next election, see CQA.

Notice to County
Clerk and Voter
Registrar

The board shall deliver notice of the election, including the location of each polling place, to the county clerk and voter registrar of each county in which the district is located not later than the 60th day before election day. The county clerk shall post notice of the election, including the location of each polling place, on the county's internet website, if the county maintains a website, as provided by Election Code 4.003(b). *Election Code 4.008(a)* [See Posting, above]

Notice to Election
Judge

Not later than the 15th day before election day or the seventh day after the date the election is ordered, whichever is later, the board shall deliver to the presiding judge of each election precinct in which the election is to be held in the district a written notice of:

1. The nature and date of the election;
2. The location of the polling place for the precinct served by the judge;
3. The hours that the polls will be open;
4. The judge's duty to hold the election in the precinct specified by the notice; and
5. The maximum number of clerks that the judge may appoint for the election.

Election Code 4.007

Failure to Give
Notice of Election

Failure to give notice of a general election does not affect the validity of the election. *Election Code 4.006*

Internet Posting

Not later than the 21st day before election day, a district that holds an election and maintains an internet website shall post on the public internet website for the district:

1. The date of the next election;
2. The location of each polling place;
3. Each candidate for an elected office on the ballot; and
4. Each measure on the ballot.

Election Code 4.009(b)

Filing Information

Notice to
Candidates

A district shall post notice of the dates of the filing period in a public place in a building in which the district has an office not later than the 30th day before the first day on which a candidate may file an application for a place on the ballot. A district shall designate an email address in the notice for the purpose of filing an application for a place on the ballot under Election Code 143.004, below.
Election Code 141.040

Note: For additional website posting requirements regarding the requirements and deadline for filing for candidacy of board member, see CQA.

Application

To be entitled to a place on the ballot, a candidate must make an application for a place on the ballot. An application, other than an application required to be accompanied by fee, may be filed through email transmission of the completed application in a scanned format to the email address designated by the filing authority in the notice required under Election Code 141.040, above.
Election Code 143.004

A candidate application for a place on the ballot must:

1. Be in writing;
2. Be signed and sworn to before a person authorized to administer an oath in this state by the candidate and indicate the date that the candidate swears to the application;
3. Be timely filed with the appropriate authority; and
4. Include all statutorily required information.

Election Code 141.031, .039

Deadline

An application for a place on the ballot may not be filed earlier than the 30th day before the date of the filing deadline.

An application must be filed not later than 5:00 p.m. of the 78th day before the date of the election for an election to be held on a uniform election date.

Education Code 11.055(a); Election Code 144.005(a), (d)

*Death of
Candidate*

If a candidate dies on or before the deadline for filing an application for a place on the ballot:

1. The authority responsible for preparing the ballots may choose to omit the candidate from the ballot; and
2. If the authority omits the candidate's name under item 1, the filing deadline for an application for a place on the ballot for

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the office sought by the candidate is extended until the fifth day after the filing deadline.

Election Code 145.098(b)

Write-in Candidate A declaration of write-in candidacy must be filed not later than 5:00 p.m. of the 74th day before election day for an election to be held on a uniform election date. *Education Code 11.056(b); Election Code 146.054*

Special Election An application for a place on a special election ballot may not be filed before the election is ordered.

An application must be filed not later than:

1. 5:00 p.m. of the 62nd day before election day if election day is on or after the 70th day after the election is ordered; or
2. 5:00 p.m. of the 40th day before election day if election day is on or after the 46th day and before the 70th day after the date the election is ordered.

Exception For a special election to be held on the date of the general election for state and county officers (the first Tuesday after the first Monday in November in even-numbered years under Election Code 41.002), the day of the filing deadline is 6:00 p.m. of the 75th day before election day.

Write-in Candidate A declaration of write-in candidacy for a special election must be filed not later than the filing deadline.

Election Code 201.054

**Delivery or
Submission of
Documents**

When the Election Code provides for the delivery, submission, or filing of an application, notice, report, or other document or paper with an authority having administrative responsibility under that code, a delivery, submission, or filing with an employee of the district at the district's usual place for conducting official business constitutes filing with the district. The district may accept the document or paper at a place other than the district's usual place for conducting official business.

A delivery, submission, or filing of a document or paper under the Election Code may be made by personal delivery, mail, telephonic facsimile machine, email, or any other method of transmission.

Election Code 1.007

**Election of
Unopposed
Candidate**

Certification of
Unopposed Status

The authority responsible for having the official ballot prepared shall certify in writing that a candidate is unopposed for election to an office if, were the election held, only the votes cast for that candidate in the election for that office may be counted. The certification shall be delivered to the board as soon as possible after the filing deadlines for placement on the ballot and list of write-in candidates.

A certification may be made following the filing of a withdrawal request by a candidate after the deadline prescribed by Election Code 145.092 if:

1. The withdrawal request is valid except for the untimely filing;
2. Ballots have not been prepared; and
3. The other conditions for certification are met.

A certification under these circumstances shall be delivered to the board as soon as possible.

Election Code 2.052

Special Election

For purposes of these provisions, a special election of a district is considered to be a separate election with a separate ballot from a general election for board members or another special election of the district held at the same time. *Election Code 2.051(a)*

*Single-Member
Districts*

In the case of an election in which any members of the board are elected from single-member districts, these provisions apply to the election in a particular single-member district if each candidate for an office that is to appear on the ballot in that single-member district is unopposed and no opposed at-large race is to appear on the ballot. These provisions apply to an unopposed at-large race in such an election regardless of whether an opposed race is to appear on the ballot in a particular territorial unit. *Election Code 2.051(b)*

Action on
Certification

On receipt of the certification, the board by order or ordinance shall declare each unopposed candidate elected to office. If a declaration is made, the election is not held.

If no election is to be held on election day by the district, a copy of the order or ordinance shall be posted on election day at each polling place used or that would have been used in the election.

The ballots used at a separate election held at the same time as an election that would have been held if the candidates were not declared elected shall include the offices and names of the candidates declared elected listed separately after the measures or contested races in the separate election under the heading

“Unopposed Candidates Declared Elected.” The candidates shall be grouped in the same relative order prescribed for the ballot generally. No votes are cast in connection with the unopposed candidates.

Election Code 2.053

[See BBBB regarding issuance of a certificate of election to an unopposed candidate declared elected and qualification for office.]

Ballot

The ballot shall be prepared in accordance with Election Code Chapter 52.

Drawing

The district shall conduct a drawing to determine the order of the candidates' names in an election at which the names of more than one candidate for the same office are to appear on the ballot. The district shall post in the district's office a notice of the date, hour, and place of the drawing. The notice must remain posted continuously for 72 hours immediately preceding the scheduled time of the drawing. The district shall provide notice of the date, hour, and place of the drawing to each candidate by:

1. Written notice:
 - a. Mailed to the address stated on the candidate's application for a place on the ballot, not later than the fourth day before the date of the drawing; or
 - b. Provided at the time the candidate files an application with the district;
2. Telephone, if a telephone number is provided on the candidate's application for a place on the ballot; or
3. Email, if an email address is provided on the candidate's application for a place on the ballot.

Each candidate affected by a drawing is entitled to be present or have a representative present at the drawing.

Election Code 52.093–.094 [See BBBB regarding ballot order in a runoff election or election to resolve a tie.]

Ballots for an election by position must clearly show the position for which each person is a candidate. A board shall arrange by lot the names of the candidates for each position. *Education Code 11.058(g)*

**Election Services
Contract**

The county election officer, as defined by Election Code 31.091(1), may contract with the board of a district situated wholly or partly in the county served by the officer to perform election services, as

provided by Election Code Chapter 31, Subchapter D, in any one or more elections ordered by the board.

If requested to do so by a district, the county elections administrator, as defined under Election Code Chapter 31, Subchapter B, shall enter into a contract to furnish the election services requested in accordance with a cost schedule agreed on by the contracting parties. A county elections administrator is not required to enter into a contract to furnish elections services for an election held on the first Saturday in May in an even-numbered year.

Election Code 31.092, .093, 41.001(d)

Election Judges and Clerks

By written order, a board shall appoint a presiding election judge and an alternate presiding judge for each election precinct in which an election is held. A board shall prescribe the maximum number of clerks that each presiding judge may appoint for each election. The judges and clerks shall be selected and serve in accordance with Election Code Chapter 32. *Election Code 32.001(a), .008, .033*

Confidentiality

An email address or personal phone number of an election judge or clerk collected or maintained by the authority conducting the election is confidential and does not constitute public information for purposes of Government Code Chapter 552 (Public Information Act).

Exception

An email address or phone number of an election judge or clerk shall be made available on request to:

1. Any entity eligible to submit lists of election judges or clerks for that election; or
2. The state executive committee of a political party with a county chair eligible to submit lists of election judges or clerks for that election.

Election Code 32.076

Polling Places

A board shall designate polling places for election day and early voting. Each polling place shall be accessible to and usable by the elderly and persons with physical disabilities. *Election Code 43.004, .034, Ch. 85 (early voting by personal appearance)*

In an election held on the November uniform election date, a district shall use the regular county election precincts. The district shall designate as the polling places for the election the regular county polling places in the county election precincts that contain territory from the district. *Election Code 42.002(a)(5), .0621, 43.004(b)*

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Electioneering

A person commits an offense if, during the voting period and within 100 feet of an outside door through which a voter may enter the building in which a polling place is located, the person loiters or electioneers for or against any candidate, measure, or political party.

A district that owns or controls a public building being used as a polling place or early voting polling place may not, at any time during the voting period or early voting period, as applicable, prohibit electioneering on the building's premises outside of the area described above, but may enact reasonable regulations concerning the time, place, and manner of electioneering.

Definitions

"Electioneering" includes the posting, use, or distribution of political signs or literature. The term does not include the distribution of a notice of a party convention authorized under Election Code 172.1114.

"Voting period" means the period beginning when the polls open for voting and ending when the polls close or the last voter has voted, whichever is later.

"Early voting period" means the period prescribed by Election Code 85.001.

Election Code 61.003, 85.036

Early Voting

In each election, early voting shall be conducted by personal appearance at an early voting polling place and by mail, in accordance with Election Code Title 7, Chapters 81–114. *Election Code 81.001*

November Early
Voting Polling
Places

In an election on the November uniform election date in which the district is not holding a joint election with a county and has not executed a contract with a county elections officer under which the district and the county share early voting polling places, the district:

1. Shall designate as an early voting polling place for the election an eligible county polling place located in the district; and
2. May not designate as an early voting polling place a location other than an eligible county polling place unless each eligible county polling place located in the district is designated as an early voting polling place by the district.

"Eligible county polling place" means an early voting polling place established by a county.

Election Code 85.010(a), (a-1), (b)

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Temporary Branch
Days and Hours

*County With
100,000 or More*

Election Code 85.064 applies only to an election in which the territory served by the early voting clerk is situated in a county with a population of 100,000 or more. In an election in which the territory served by the clerk is situated in more than one county, that section applies if the sum of the populations of the counties is 100,000 or more.

Early voting by personal appearance at each temporary branch polling place shall be conducted on the days that voting is required to be conducted at the main early voting polling place under Election Code 85.005 and remain open for at least:

1. Eight hours each day; or
2. Three hours each day if the city or county clerk does not serve as the early voting clerk for the territory holding the election and the territory has fewer than 1,000 registered voters.

The authority authorized under Election Code 85.006 to order early voting on a Saturday or Sunday may also order, in the manner prescribed by that section, early voting to be conducted on a Saturday or Sunday at any one or more of the temporary branch polling places.

Election Code 85.064

*County With Less
Than 100,000*

Election Code 85.065 applies only to an election in which the territory served by the early voting clerk is situated in a county with a population under 100,000. In an election in which the territory served by the clerk is situated in more than one county, this section applies if the sum of the populations of the counties is under 100,000.

Except as provided below, voting at a temporary branch polling place may be conducted on any days and during any hours of the period for early voting by personal appearance, as determined by the authority establishing the branch. The authority authorized under Election Code 85.006 to order early voting on a Saturday or Sunday may also order, in the manner prescribed by that section, early voting to be conducted on a Saturday or Sunday at any one or more of the temporary branch polling places.

Voting at a temporary branch polling place must be conducted on at least two consecutive business days and for at least eight consecutive hours on each of those days.

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The schedules for conducting voting are not required to be uniform among the temporary branch polling places.

Election Code 85.065

Records
*Branch Daily
Register*

The early voting clerk shall provide, in a downloadable database format, a current copy of the register for posting on the internet website of the district, if the district maintains a website, each day early voting is conducted. At a minimum, the voter registration number for each voter listed in the register must be posted. *Election Code 85.072*

*Early Voting
Rosters*

The early voting clerk shall maintain for each election a roster listing each person who votes an early voting ballot by personal appearance and a roster listing each person to whom an early voting ballot to be voted by mail is sent. Information on the roster for a person who votes an early voting ballot by personal appearance shall be made available for public inspection as provided below not later than 11 a.m. on the day after the date the information is entered on the roster. Information on the roster for a person who votes an early voting ballot by mail shall be made available for public inspection as provided below not later than 11 a.m. on the day following the day the early voting clerk receives any ballot voted by mail.

The information must be made available:

1. For an election in which the county clerk is the early voting clerk:
 - a. On the publicly accessible internet website of the county; or
 - b. If the county does not maintain a website, on the bulletin board used for posting notice of meetings of the commissioners court; or
2. For an election not described by item 1:
 - a. On the publicly accessible internet website of the district; or
 - b. If the district does not maintain a website, on the bulletin board used for posting notice of board meetings.

Election Code 87.121(a), (g)–(i)

**Conducting
Elections**

Elections shall be conducted in accordance with Election Code Title 6, Chapters 61–68.

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Bilingual Materials

Spanish

Bilingual election materials shall be used in each election precinct situated wholly or partly in a county in which five percent or more of the inhabitants are persons of Spanish origin or descent according to the most recent federal decennial census that may be officially recognized or acted upon by the state or political subdivisions.
Election Code 272.002

Other Languages

If the director of the census determines that a district must provide election materials in a language other than English or Spanish, the district shall provide election materials in that language in the same manner in which the district would be required to provide materials in Spanish, to the extent applicable. *Election Code 272.011; 52 U.S.C. 10503*

Voting Systems

A voting system shall be adopted and utilized in accordance with Election Code Title 8.

Accessible Voting
Stations

Except as provided below, each polling place must provide at least one voting station that complies with Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. Section 794) and its subsequent amendments, Title II of the Americans with Disabilities Act (42 U.S.C. Section 12131 et seq.) and its subsequent amendments, and the requirements for accessibility under 52 U.S.C. Section 21081(a)(3) [formerly 42 U.S.C. Section 15481(a)(3)] and its subsequent amendments, and that provides a practical and effective means for voters with physical disabilities to cast a secret ballot.
Election Code 61.012

*Electronic Voting
System
Exceptions*

For an election other than an election of a district that is held jointly with another election in which a federal office appears on the ballot, a district is not required to meet the requirements for accessibility under Election Code 61.012(a)(1)(C) if the district is located in a county that meets certain population and other requirements set forth in Election Code 61.013(a). A district that intends to use this provision to provide fewer voting stations that meet the requirements for accessibility than required must provide notice under Election Code 61.013(d). *Election Code 61.013*

PLANNING AND DECISION-MAKING PROCESS

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**Planning and
Decision-Making
Process**

A board shall adopt a policy to establish a district- and campus-level planning and decision-making process that will involve the professional staff of a district, parents of students enrolled in a district, business representatives, and community members in establishing and reviewing the district's and campuses' educational plans, goals, performance objectives, and major classroom instructional programs. *Education Code 11.251(b)*

The planning and decision-making requirements do not:

1. Prohibit a board from conducting meetings with teachers or groups of teachers other than the district-level committee meetings.
2. Prohibit a board from establishing policies providing avenues for input from others, including students or paraprofessional staff, in district- or campus-level planning and decision making.
3. Limit or affect the power of a board to govern the public schools.
4. Create a new cause of action or require collective bargaining.

Education Code 11.251(g)

Evaluation

At least every two years, a district shall evaluate the effectiveness of the district's decision-making and planning policies, procedures, and staff development activities related to district- and campus-level decision making and planning to ensure that they are effectively structured to positively impact student performance. *Education Code 11.252(d)*

**Administrative
Procedure**

A board shall ensure that an administrative procedure is provided to clearly define the respective roles and responsibilities of the superintendent, central office staff, principals, teachers, district-level committee members, and campus-level committee members in the areas of planning, budgeting, curriculum, staffing patterns, staff development, and school organization.

A board shall ensure that the district-level planning and decision-making committee will be actively involved in establishing the administrative procedure that defines the respective roles and responsibilities pertaining to planning and decision making at the district and campus levels.

Education Code 11.251(d)

**Federal
Requirements**

The district policy must provide that all pertinent federal planning requirements are addressed through the district- and campus-level planning process. *Education Code 11.251(f)*

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Required Plans

A board shall ensure that a district improvement plan and improvement plans for each campus are developed, reviewed, and revised annually for the purpose of improving the performance of all students. A board shall annually approve district and campus performance objectives and shall ensure that the district and campus plans:

1. Are mutually supportive to accomplish the identified objectives; and
2. At a minimum, support the state goals and objectives under Education Code Chapter 4.

Education Code 11.251(a)

Shared Services
Arrangement for
DAEP Services

Each district participating in a shared services arrangement for disciplinary alternative education program (DAEP) services shall be responsible for ensuring that the board-approved district improvement plan and the improvement plans for each campus include the performance of the DAEP student group for the respective district. The identified objectives for the improvement plans shall include:

1. Student groups served, including overrepresentation of students from economically disadvantaged families, with ethnic and racial representations, with a disability who receive special education services, or receiving limited English proficiency/English learner services;
2. Attendance rates;
3. Pre- and post-assessment results;
4. Dropout rates;
5. Graduation rates; and
6. Recidivism rates.

19 TAC 103.1201(b) [See FOCA]

District
Improvement Plan

A district shall have a district improvement plan that is developed, evaluated, and revised annually, in accordance with district policy, by the superintendent with the assistance of the district-level committee. The purpose of the district improvement plan is to guide district and campus staff in the improvement of student performance for all student groups in order to attain state standards in respect to the achievement indicators. *Education Code 11.252(a)* [See AIA]

*Availability to
TEA*

A district's plan for the improvement of student performance is not filed with the Texas Education Agency (TEA), but the district must

PLANNING AND DECISION-MAKING PROCESS

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make the plan available to TEA on request. *Education Code 11.252(b)*

*Required
Provisions*

The district improvement plan must include provisions for:

1. A comprehensive needs assessment addressing performance on the achievement indicators, and other appropriate measures of performance, that are disaggregated by all student groups served by a district, including categories of ethnicity, socioeconomic status, sex, and populations served by special programs, including students in special education programs under Education Code Chapter 29, Subchapter A.
2. Measurable district performance objectives for all appropriate achievement indicators for all student populations, including students in special education programs under Education Code Chapter 29, Subchapter A, and other measures of student performance that may be identified through the comprehensive needs assessment.
3. Strategies for improvement of student performance that include:
 - a. Instructional methods for addressing the needs of student groups not achieving their full potential.
 - b. Evidence-based practices that address the needs of students for special programs, including:
 - (1) Suicide prevention programs, in accordance with Education Code Chapter 38, Subchapter G, which include a parental or guardian notification procedure [see FFEB];
 - (2) Conflict resolution programs;
 - (3) Violence prevention programs; and
 - (4) Dyslexia treatment programs.
 - c. Dropout reduction.
 - d. Integration of technology in instructional and administrative programs.
 - e. Positive behavior interventions and support, including interventions and support that integrate best practices on grief-informed and trauma-informed care.
 - f. Staff development for professional staff of a district.

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- g. Career education to assist students in developing the knowledge, skills, and competencies necessary for a broad range of career opportunities.
 - h. Accelerated education.
 - i. Implementation of a comprehensive school counseling program under Education Code 33.005. [See FFEA]
- 4. Strategies for providing to elementary school, middle school, junior high school, and high school students, those students' teachers and school counselors, and those students' parents information about:
 - a. Higher education admissions and financial aid opportunities, including state financial aid opportunities such as the TEXAS grant program and the Teach for Texas grant program.
 - b. The need for students to make informed curriculum choices to be prepared for success beyond high school.
 - c. Sources of information on higher education admissions and financial aid.
- 5. Resources needed to implement identified strategies.
- 6. Staff responsible for ensuring the accomplishment of each strategy.
- 7. Timelines for ongoing monitoring of the implementation of each improvement strategy.
- 8. Formative evaluation criteria for determining periodically whether strategies are resulting in intended improvement of student performance.
- 9. The policy under Education Code 38.0041 addressing sexual abuse and other maltreatment of children. [See FFG]
- 10. The trauma-informed care policy required under Education Code 38.036. [See FFBA]

Education Code 11.252(a)

Law
Enforcement
Duties

The law enforcement duties of peace officers, school resource officers, and security personnel must be included in the district improvement plan. *Education Code 37.081(d)(1)* [See CKE]

Discipline
Management

A district shall adopt and implement a discipline management program to be included in the district improvement plan. *Education Code 37.083(a)* [See FNC]

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Dating Violence	A district shall adopt and implement a dating violence policy to be included in the district improvement plan. <i>Education Code 37.0831</i> [See FFH]
Bullying Prevention	The policy and any necessary procedures adopted under Education Code 37.083(c) (concerning bullying) must be included in the district improvement plan. <i>Education Code 37.0832(d)(2)</i> [See FFI]
Mental Health, Substance Abuse, and Suicide	The practices and procedures developed under Education Code 38.351(i) or (i-1) (mental health promotion and intervention, substance abuse prevention and intervention, and suicide prevention) must be included in the district improvement plan. <i>Education Code 38.351(k)(2)</i> [See FFEB]
Campus-Level Plan	Each school year, the principal of each school campus, with the assistance of the campus-level committee, shall develop, review, and revise the campus improvement plan for the purpose of improving student performance for all student populations, including students in special education programs under Education Code Chapter 29, Subchapter A, with respect to the student achievement indicators and any other appropriate performance measures for special needs populations. <i>Education Code 11.253(c)</i> Each campus improvement plan must: 1. Assess the academic achievement for each student in the school using the achievement indicator system. 2. Set the campus performance objectives based on the achievement indicator system, including objectives for special needs populations, including students in special education programs under Education Code Chapter 29, Subchapter A. 3. Identify how the campus goals will be met for each student. 4. Determine the resources needed to implement the plan. 5. Identify staff needed to implement the plan. 6. Set timelines for reaching the goals. 7. Measure progress toward the performance objectives periodically to ensure that the plan is resulting in academic improvement. 8. Include goals and methods for violence prevention and intervention on campus. 9. Provide for a program to encourage parental involvement at the campus.

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10. If the campus is an elementary, middle, or junior high school, set goals and objectives for the coordinated health program at the campus based on:
 - a. Student fitness assessment data, including any data from research-based assessments such as the school health index assessment and planning tool created by the federal Centers for Disease Control and Prevention;
 - b. Student academic performance data;
 - c. Student attendance rates;
 - d. The percentage of students who are educationally disadvantaged;
 - e. The use and success of any method to ensure that students participate in moderate to vigorous physical activity; and
 - f. Any other indicator recommended by the local school health advisory council.

Education Code 11.253(d)

Please Note: This manual does not have policies in all codes. The coding structure is common to all TASB manuals and is designed to accommodate expansion of both (LEGAL) and (LOCAL) policy topics and administrative regulations.

SECTION C: BUSINESS AND SUPPORT SERVICES

CA	FISCAL MANAGEMENT GOALS AND OBJECTIVES
CAA	Financial Ethics
CB	STATE AND FEDERAL REVENUE SOURCES
CBA	State
CBB	Federal
CC	LOCAL REVENUE SOURCES
CCA	Bond Issues
CCB	Time Warrants
CCC	Certificates of Indebtedness
CCD	Recreational Facilities Bonds
CCE	Athletic Stadium Authority
CCF	Loans and Notes
CCG	Ad Valorem Taxes
CCGA	Exemptions and Payments
CCGB	Economic Development
CCH	Appraisal District
CD	OTHER REVENUES
CDA	Investments
CDB	Sale, Lease, or Exchange of School-Owned Property
CDBA	Revenue Bonds from Proceeds
CDC	Gifts and Solicitations
CDD	Rentals and Service Charges
CDE	Shop Sales
CDF	Royalties
CDG	Gate Receipts, Concessions
CDH	Public and Private Facilities
CE	ANNUAL OPERATING BUDGET
CEA	Financial Exigency
CF	ACCOUNTING
CFA	Financial Reports and Statements
CFB	Inventories
CFC	Audits
CFD	Activity Funds Management
CFE	Payroll Procedures
CFEA	Salary Deductions and Reductions
CFF	Checking Accounts
CFG	Cash in School Buildings
CG	BONDED EMPLOYEES AND OFFICERS

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SECTION C: BUSINESS AND SUPPORT SERVICES

CH	PURCHASING AND ACQUISITION
CHB	Petty Cash Account
CHD	Purchasing Procedures
CHE	Vendor Disclosures and Contracts
CHF	Payment Procedures
CHG	Real Property and Improvements
CHH	Financing Personal Property Purchases
CI	SCHOOL PROPERTIES DISPOSAL
CJ	CONTRACTED SERVICES
CJA	Criminal History
CK	SAFETY PROGRAM/RISK MANAGEMENT
CKA	Inspections
CKB	Accident Prevention and Reports
CKC	Emergency Plans
CKD	Emergency Medical Equipment and Procedures
CKE	Security Personnel
CKEA	Commissioned Peace Officers
CKEB	School Marshals
CKEC	School Resource Officers
CKED	Other Security Arrangements
CL	BUILDINGS, GROUNDS, AND EQUIPMENT MANAGEMENT
CLA	Security
CLB	Maintenance
CLC	Traffic and Parking Controls
CLD	Records and Reports
CLE	Flag Displays
CM	EQUIPMENT AND SUPPLIES MANAGEMENT
CMA	Receiving and Warehousing
CMB	Authorized Uses of Equipment and Supplies
CMD	Instructional Materials Care and Accounting
CN	TRANSPORTATION MANAGEMENT
CNA	Student Transportation
CNB	District Vehicles
CNBA	Bus Maintenance
CNC	Transportation Safety
CO	FOOD AND NUTRITION MANAGEMENT
COA	Procurement
COB	Free and Reduced-Price Meals
COC	Vending Machines

Please Note: This manual does not have policies in all codes. The coding structure is common to all TASB manuals and is designed to accommodate expansion of both (LEGAL) and (LOCAL) policy topics and administrative regulations.

SECTION C: BUSINESS AND SUPPORT SERVICES

CP	OFFICE MANAGEMENT
CPA	Office Communications
CPAA	Printing and Duplicating
CPAB	Mail and Delivery
CPAC	Telephone
CPC	Records Management
CQ	TECHNOLOGY RESOURCES
CQA	District, Campus, and Classroom Websites
CQB	Cybersecurity
CQC	Equipment
CR	INSURANCE AND ANNUITIES MANAGEMENT
CRA	Property Insurance
CRB	Liability Insurance
CRD	Health and Life Insurance
CRE	Workers' Compensation
CRF	Unemployment Insurance
CRG	Deferred Compensation and Annuities
CS	FACILITY STANDARDS
CSA	Safety and Security
CSB	Gas and Pipelines
CT	FACILITIES PLANNING
CV	FACILITIES CONSTRUCTION
CVA	Competitive Bidding
CVB	Competitive Sealed Proposals
CVC	Construction Manager-Agent
CVD	Construction Manager-at-Risk
CVE	Design-Build
CVF	Job Order Contracts
CW	NAMING FACILITIES
CX	CONTRACTS FOR FACILITIES
CY	INTELLECTUAL PROPERTY

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The Texas Education Agency (TEA) may enter into an agreement with a federal agency concerning a project related to education, including provision of school lunches and construction of school buildings. TEA, or another state agency designated by the governor, shall coordinate the actions of a district participating in a federal financial assistance program. *Education Code 7.021(b), (c); Gov't Code 742.003*

**Retirement and
Insurance
Contributions**

Under the Texas Public School Retired Employees Group Benefits Act, Insurance Code Chapter 1575, a district that applies for money provided by the United States or a privately sponsored source shall, if any of the money will pay part or all of an active employee's salary, also apply for any legally available money to pay state contributions required by Insurance Code Chapter 1575, Subchapter E. *Insurance Code 1575.252*

Such district must comply with the requirements of Insurance Code Chapter 1575, Subchapter F. *Insurance Code 1575.252(2)–.257*

Under the Teacher Retirement System, Government Code, Title 8, Subtitle C, if a district applies for money provided by the United States, an agency of the United States, or a privately sponsored source, and if any of the money will pay part or all of an employee's salary, the district shall apply for any legally available money to pay state contributions required by Government Code 825.404 or 830.201. *Gov't Code 825.406(a)*

Such district must comply with the requirements of Government Code 825.406.

Block Grant Funds

If a district receives more than \$5,000 in block grant funds to be used as the district determines is appropriate, it shall provide evidence to TEA that a public meeting or hearing was held in a timely manner solely to seek public comment on the needs or uses of block grant funds received by the district. The board may hold this meeting or hearing in conjunction with another board meeting or hearing if the meeting or hearing to consider block grant funds is clearly noted in an announcement of the other meeting or hearing. *Gov't Code 2105.058*

**Education
Department General
Administrative
Regulations
(EDGAR)**

Note: For information regarding procurement under state law, see the CH policy series regarding Purchasing and Acquisition and the CV series regarding Facilities Construction.

For additional legal requirements applicable to school nutrition procurement, see COA.

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EDGAR means the Education Department General Administrative Regulations (34 C.F.R. 75, 76, 77, 79, 81, 82, 84, 86, 97, 98, and 99). *34 C.F.R. 77.1(c)*

Uniform Guidance
(2 C.F.R. 200)

The Department of Education (ED) adopts the Office of Management and Budget (OMB) Guidance in 2 C.F.R. Part 200 Uniform Guidance, except for 2 C.F.R. 200.102(a) and 2 C.F.R. 200.207(a). Thus, 2 C.F.R. Chapter XXXIV, Part 3474 gives regulatory effect to the OMB guidance and supplements the guidance as needed for the ED. *2 C.F.R. 3474.1*

The Uniform Guidance establishes uniform administrative requirements, cost principles, and audit requirements for federal awards to non-federal entities, including school districts, as described in 2 C.F.R. 200.101 (Applicability). *2 C.F.R. 200.100(a)(1)*

Note: For more information on EDGAR, the Uniform Guidance, and the federal regulations that apply to federal education grant awards, visit TEA's [EDGAR Materials and Resources](#)¹ and the ED's [EDGAR website](#)² and [Uniform Guidance website](#).³

*General
Compliance*

A district is responsible for complying with all requirements of the federal award. *2 C.F.R. 200.300(b)*

Throughout 2 C.F.R. Part 200 when the word “must” is used it indicates a requirement. Whereas, use of the word “should” or “may” indicates a best practice or recommended approach rather than a requirement and permits discretion. *2 C.F.R. 200.101(b)(1)*

*Disclosures
Conflicts*

A district must disclose in writing any potential conflict of interest to the federal awarding agency (e.g., ED) or pass-through entity (e.g., TEA) in accordance with applicable federal awarding agency policy. *2 C.F.R. 200.112*

Crimes

A district must disclose, in a timely manner, in writing to the federal awarding agency or pass-through entity all violations of federal criminal law involving fraud, bribery, or gratuity violations potentially affecting the federal award. Failure to make required disclosures can result in any of the remedies described in 2 C.F.R. 200.339 (Remedies for Noncompliance). *2 C.F.R. 200.113*

*Procurement
Standards
District
Procedures*

The district must have and use documented procurement procedures, consistent with state, local, and tribal laws and regulations and the standards of 2 C.F.R. 200.318, for the acquisition of property or services required under a federal award or subaward. The district's documented procurement procedures [see Competition,

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below] must conform to the procurement standards identified in 2 C.F.R. 200.317 through 200.327.

Oversight	The district must maintain oversight to ensure that contractors perform in accordance with the terms, conditions, and specifications of their contracts or purchase orders.
Conflicts of Interest	The district must maintain written standards of conduct covering conflicts of interest and governing the actions of its employees engaged in the selection, award, and administration of contracts. No employee, officer, or agent may participate in the selection, award, or administration of a contract supported by a federal award if he or she has a real or apparent conflict of interest. A conflict of interest would arise when the employee, officer, or agent, any member of his or her immediate family, his or her partner, or an organization that employs or is about to employ any of these parties, has a financial or other interest in or a tangible personal benefit from a firm considered for a contract. The officers, employees, and agents of the district may neither solicit nor accept gratuities, favors, or anything of monetary value from contractors or parties to subcontracts. However, districts may set standards for situations in which the financial interest is not substantial or the gift is an unsolicited item of nominal value. The standards of conduct must provide for disciplinary actions to be applied for violations of such standards by officers, employees, or agents of the district. [See BBFA, CAA(LOCAL), CB(LOCAL), DBD]
Records	The district must maintain records sufficient to detail the history of procurement. These records will include, but are not necessarily limited to, the following: rationale for the method of procurement, selection of contract type, contractor selection or rejection, and the basis for the contract price. [See Pre-procurement Review and Contract Cost and Price, below] <i>2 C.F.R. 200.318(a), (b), (c)(1), (i)</i> [See 2 C.F.R. 200.334 for record retention requirements.]
<i>Financial Management</i>	The district's financial management systems, including records documenting compliance with federal statutes, regulations, and the terms and conditions of the federal award, must be sufficient to permit the preparation of reports required by general and program-specific terms and conditions; and the tracing of funds to a level of expenditures adequate to establish that such funds have been used according to the federal statutes, regulations, and the terms and conditions of the federal award. [See also 2 C.F.R. 200.450 (Lobbying)]

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The district's financial management system must comply with 2 C.F.R. 200.302(b). [See also 2 C.F.R. 200.334 (Retention requirements for records), .335 (Requests for transfer of records), .336 (Methods for collection, transmission and storage of information), and .337 (Access to records)]

2 C.F.R. 200.302

Internal Controls The district must:

1. Establish and maintain effective internal control over the federal award that provides reasonable assurance that the district is managing the award in compliance with federal statutes, regulations, and the terms and conditions of the award. These internal controls should be in compliance with guidance in "Standards for Internal Control in the Federal Government" issued by the Comptroller General of the United States or the "Internal Control Integrated Framework" issued by the Committee of Sponsoring Organizations of the Treadway Commission (COSO).
2. Comply with the U.S. Constitution, federal statutes, regulations, and the terms and conditions of the award.
3. Evaluate and monitor the district's compliance with statutes, regulations and the terms and conditions of federal awards.
4. Take prompt action when instances of noncompliance are identified including noncompliance identified in audit findings.
5. Take reasonable measures to safeguard protected personally identifiable information and other information the federal awarding agency or pass-through entity designates as sensitive or the district considers sensitive consistent with applicable federal, state, local, and tribal laws regarding privacy and responsibility over confidentiality.

2 C.F.R. 200.303

"Internal controls" for districts means processes designed and implemented by districts to provide reasonable assurance regarding the achievement of objectives in the following categories:

1. Effectiveness and efficiency of operations;
2. Reliability of reporting for internal and external use; and
3. Compliance with applicable laws and regulations.

2 C.F.R. 200.1

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Competition

All procurement transactions for the acquisition of property or services required under a federal award must be conducted in a manner providing full and open competition consistent with the standards of 2 C.F.R. 200.319 and 200.320 (Methods of procurement to be followed).

In order to ensure objective contractor performance and eliminate unfair competitive advantage, contractors that develop or draft specifications, requirements, statements of work, or invitations for bids or requests for proposals must be excluded from competing for such procurements.

The district must conduct procurements in a manner that prohibits the use of statutorily or administratively imposed state, local, or tribal geographical preferences in the evaluation of bids or proposals, except in those cases where applicable federal statutes expressly mandate or encourage geographic preference. Nothing in this provision preempts state licensing laws. When contracting for architectural and engineering services, geographic location may be a selection criterion provided its application leaves an appropriate number of qualified firms, given the nature and size of the project, to compete for the contract.

The district must have written procedures for procurement transactions. These procedures must ensure that all solicitations meet the requirements of 2 C.F.R. 200.319(d). [See Procurement Standards, above]

The district must ensure that all prequalified lists of persons, firms, or products which are used in acquiring goods and services are current and include enough qualified sources to ensure maximum open and free competition. Also, the district must not preclude potential bidders from qualifying during the solicitation period.

Noncompetitive procurements can only be awarded in accordance with 2 C.F.R. 200.320(c).

2 C.F.R. 200.319

*Procurement
Methods*

The district must have and use documented procurement procedures, consistent with the standards of 2 C.F.R. 200.320 and 200.317 (Procurements by states), 200.318 (General procurement standards), and 200.319 (Competition) for any of the following methods of procurement used for the acquisition of property or services required under a federal award or sub-award. *2 C.F. R. 200.320*

Informal
Procurement
Methods

When the value of the procurement for property or services under a federal award does not exceed the simplified acquisition threshold, as defined in 2 C.F.R. 200.1, or a lower threshold established

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by a district, formal procurement methods are not required. The district may use informal procurement methods to expedite the completion of its transactions and minimize the associated administrative burden and cost. The informal methods used for procurement of property or services at or below the simplified acquisition threshold include:

*Micro-
Purchases—
Definitions*

“Micro-purchase” means a purchase of supplies or services, the aggregate amount of which does not exceed the micro-purchase threshold. Micro-purchases comprise a subset of a district's small purchases as defined in 2 C.F.R. 200.320.

“Micro-purchase threshold” means the dollar amount at or below which a district may purchase property or services using micro-purchase procedures. Generally, the micro-purchase threshold for procurement activities administered under federal awards is not to exceed the amount set by the Federal Acquisition Regulations (FAR) at 48 C.F.R. Part 2, Subpart 2.1 [see below], unless a higher threshold is requested by the district and approved by the cognizant agency for indirect costs.

2 C.F.R. 200.1

Micro-purchase threshold means \$10,000, except as provided by 48 C.F.R. 2.101. *48 C.F.R. 2.101*

*Micro-
Purchase
Distribution*

The acquisition of supplies or services, the aggregate dollar amount of which does not exceed the micro-purchase threshold. [See the definition of “micro-purchase” above.] To the maximum extent practicable, the district should distribute micro-purchases equitably among qualified suppliers. *2 C.F.R. 200.320(a)(1)(i)*

*Micro-
Purchase
Awards*

Micro-purchases may be awarded without soliciting competitive price or rate quotations if the district considers the price to be reasonable based on research, experience, purchase history or other information and documents it files accordingly. Purchase cards can be used for micro-purchases if procedures are documented and approved by the district. *2 C.F.R. 200.320(a)(1)(ii)*

*Micro-
Purchase
Thresholds*

The district is responsible for determining and documenting an appropriate micro-purchase threshold based on internal controls, an evaluation of risk, and its documented procurement procedures. The micro-purchase threshold used by the district must be authorized or not prohibited under state, local, or tribal laws or regulations. Districts may establish a threshold higher than the federal threshold established in the FAR in accordance with 2 C.F.R. 200.320(a)(1)(iv) and (v). *2 C.F.R. 200.320(a)(1)(iii)*

Districts may establish a threshold higher than the micro-purchase threshold identified in the FAR in accordance with the requirements

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of 2 C.F.R. 200.320. The district may self-certify a threshold up to \$50,000 on an annual basis and must maintain documentation to be made available to the federal awarding agency and auditors in accordance with 2 C.F.R. 200.334. The self-certification must include a justification, clear identification of the threshold, and supporting documentation of any of the following:

1. A qualification as a low-risk auditee, in accordance with the criteria in 2 C.F.R. 200.520 for the most recent audit.
2. An annual internal institutional risk assessment to identify, mitigate, and manage financial risks; or,
3. For public institutions, a higher threshold consistent with state law.

2 C.F.R. 200.320(a)(1)(iv)

Micro-purchase thresholds higher than \$50,000 must be approved by the cognizant agency for indirect costs. The district must submit a request with the requirements included in 2 C.F.R.

200.320(a)(1)(iv). The increased threshold is valid until there is a change in status in which the justification was approved. *2 C.F.R. 200.320(a)(1)(v)*

*Small
Purchases—
Procedures*

The acquisition of property or services, the aggregate dollar amount of which is higher than the micro-purchase threshold but does not exceed the simplified acquisition threshold. If small purchase procedures are used, price or rate quotations must be obtained from an adequate number of qualified sources as determined appropriate by the district. *2 C.F.R. 200.320(a)(2)(i)*

*Small
Purchases—
Simplified
Acquisition
Thresholds*

“Simplified acquisition threshold” means the dollar amount below which a district may purchase property or services using small purchase methods. Districts adopt small purchase procedures in order to expedite the purchase of items at or below the simplified acquisition threshold. The simplified acquisition threshold for procurement activities administered under federal awards is set by the FAR at 48 C.F.R. Part 2, Subpart 2.1 [see below]. The district is responsible for determining an appropriate simplified acquisition threshold based on internal controls, an evaluation of risk, and its documented procurement procedures. However, in no circumstances can this threshold exceed the dollar value established in the FAR (48 C.F.R. Part 2, Subpart 2.1) for the simplified acquisition threshold. Recipients should determine if local government laws on purchasing apply. *2 C.F.R. 200.1, .320(a)(2)(ii)*

Simplified acquisition threshold means \$250,000, except as provided by 48 C.F.R. 2.101. *48 C.F.R. 2.101*

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Formal
Procurement
Methods

When the value of the procurement for property or services under a federal financial assistance award exceeds the simplified acquisition threshold, or a lower threshold established by a district, formal procurement methods are required. Formal procurement methods require following documented procedures. Formal procurement methods also require public advertising unless a non-competitive procurement can be used in accordance with 2 C.F.R. 200.319 or 200.320(c). The following formal methods of procurement are used for procurement of property or services above the simplified acquisition threshold or a value below the simplified acquisition threshold the district determines to be appropriate:

Sealed Bids

A procurement method in which bids are publicly solicited and a firm fixed-price contract (lump sum or unit price) is awarded to the responsible bidder whose bid, conforming with all the material terms and conditions of the invitation for bids, is the lowest in price. The sealed bids method is the preferred method for procuring construction, if the conditions [sic].

In order for sealed bidding to be feasible, the following conditions should be present:

1. A complete, adequate, and realistic specification or purchase description is available;
2. Two or more responsible bidders are willing and able to compete effectively for the business; and
3. The procurement lends itself to a firm fixed price contract and the selection of the successful bidder can be made principally on the basis of price.

If sealed bids are used, the following requirements apply:

1. Bids must be solicited from an adequate number of qualified sources, providing them sufficient response time prior to the date set for opening the bids, for local governments, the invitation for bids must be publicly advertised;
2. The invitation for bids, which will include any specifications and pertinent attachments, must define the items or services in order for the bidder to properly respond;
3. All bids will be opened at the time and place prescribed in the invitation for bids, and for local governments, the bids must be opened publicly;
4. A firm fixed price contract award will be made in writing to the lowest responsive and responsible bidder. Where specified in bidding documents, factors such as discounts, transportation

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cost, and life cycle costs must be considered in determining which bid is lowest. Payment discounts will only be used to determine the low bid when prior experience indicates that such discounts are usually taken advantage of; and

5. Any or all bids may be rejected if there is a sound documented reason.

2 C.F.R. 200.320(b)(1)

Proposals

A procurement method in which either a fixed price or cost-reimbursement type contract is awarded. Proposals are generally used when conditions are not appropriate for the use of sealed bids. They are awarded in accordance with the following requirements:

1. Requests for proposals must be publicized and identify all evaluation factors and their relative importance. Proposals must be solicited from an adequate number of qualified offerors. Any response to publicized requests for proposals must be considered to the maximum extent practical;
2. The district must have a written method for conducting technical evaluations of the proposals received and making selections;
3. Contracts must be awarded to the responsible offeror whose proposal is most advantageous to the district, with price and other factors considered; and
4. The district may use competitive proposal procedures for qualifications-based procurement of architectural/engineering (A/E) professional services whereby offeror's qualifications are evaluated and the most qualified offeror is selected, subject to negotiation of fair and reasonable compensation. The method, where price is not used as a selection factor, can only be used in procurement of A/E professional services. It cannot be used to purchase other types of services though A/E firms are a potential source to perform the proposed effort.

2 C.F.R. 200.320(b)(2)

*Noncompetitive
Procurement*

There are specific circumstances in which noncompetitive procurement can be used. Noncompetitive procurement can only be awarded if one or more of the following circumstances apply:

1. The acquisition of property or services, the aggregate dollar amount of which does not exceed the micro-purchase threshold;
2. The item is available only from a single source;

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3. The public exigency or emergency for the requirement will not permit a delay resulting from publicizing a competitive solicitation;
4. The federal awarding agency or pass-through entity expressly authorizes a noncompetitive procurement in response to a written request from the district; or
5. After solicitation of a number of sources, competition is determined inadequate.

2 C.F.R. 200.320(c)

Cooperative
Purchasing

To foster greater economy and efficiency, and in accordance with efforts to promote cost-effective use of shared services across the federal government, the district is encouraged to enter into state and local intergovernmental agreements or inter-entity agreements where appropriate for procurement or use of common or shared goods and services. Competition requirements will be met with documented procurement actions using strategic sourcing, shared services, and other similar procurement arrangements. *2 C.F.R. 200.318(e)*

*Minority, Small,
and Women's
Businesses*

The district must take all necessary affirmative steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible. Affirmative steps must include:

1. Placing qualified small and minority businesses and women's business enterprises on solicitation lists;
2. Assuring that small and minority businesses and women's business enterprises are solicited whenever they are potential sources;
3. Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises;
4. Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises;
5. Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce; and

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6. Requiring the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in items 1 through 5 above.

2 C.F.R. 200.321

*Domestic
Preference*

As appropriate and to the extent consistent with law, the district should, to the greatest extent practicable under a federal award, provide a preference for the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products). The requirements of 2 C.F.R. 200.322 must be included in all subawards including all contracts and purchase orders for work or products under this award.

For purposes of this provision:

1. "Produced in the United States" means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States.
2. "Manufactured products" means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum; plastics and polymer-based products such as polyvinyl chloride pipe; aggregates such as concrete; glass, including optical fiber; and lumber.

2 C.F.R. 200.322

*Pre-procurement
Review*

The district must make available upon request, for the federal awarding agency or pass-through entity pre-procurement review, procurement documents, such as requests for proposals or invitations for bids, or independent cost estimates, when:

1. The district's procurement procedures or operation fails to comply with the procurement standards in 2 C.F.R. Part 200;
2. The procurement is expected to exceed the simplified acquisition threshold and is to be awarded without competition or only one bid or offer is received in response to a solicitation;
3. The procurement, which is expected to exceed the simplified acquisition threshold, specifies a "brand name" product;
4. The proposed contract is more than the simplified acquisition threshold and is to be awarded to other than the apparent low bidder under a sealed bid procurement; or

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5. A proposed contract modification changes the scope of a contract or increases the contract amount by more than the simplified acquisition threshold.

2 C.F.R. 200.325(b)

*Contract Cost
and Price*

The district must perform a cost or price analysis in connection with every procurement action in excess of the simplified acquisition threshold including contract modifications. The method and degree of analysis is dependent on the facts surrounding the particular procurement situation, but as a starting point, the district must make independent estimates before receiving bids or proposals.

The district must negotiate profit as a separate element of the price for each contract in which there is no price competition and in all cases where cost analysis is performed. To establish a fair and reasonable profit, consideration must be given to the complexity of the work to be performed, the risk borne by the contractor, the contractor's investment, the amount of subcontracting, the quality of its record of past performance, and industry profit rates in the surrounding geographical area for similar work.

Costs or prices based on estimated costs for contracts under the federal award are allowable only to the extent that costs incurred or cost estimates included in negotiated prices would be allowable for the district under 2 C.F.R. Part 200, Subpart E. The district may reference its own cost principles that comply with the federal cost principles.

The cost plus a percentage of cost and percentage of construction cost methods of contracting must not be used.

2 C.F.R. 200.324

*Contract
Provisions*

The district's contracts must contain the applicable provisions described in appendix II to 2 C.F.R. Part 200. *2 C.F.R. 200.327*

*Suspension and
Debarment*

Districts are subject to the non-procurement debarment and suspension regulations at 2 C.F.R. Part 180. These regulations restrict awards, subawards, and contracts with certain parties that are debarred, suspended, or otherwise excluded from or ineligible for participation in federal assistance programs or activities. *2 C.F.R. 200.214*

*Remedies for
Noncompliance*

If a district fails to comply with the U.S. Constitution, federal statutes, regulations, or the terms and conditions of a federal award, the federal awarding agency or pass-through entity may impose additional conditions, as described in 2 C.F.R. 200.208 (Specific Conditions). If the federal awarding agency or pass-through entity determines that noncompliance cannot be remedied by im-

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posing additional conditions, the federal awarding agency or pass-through entity may take one or more of the following actions, as appropriate in the circumstances:

1. Temporarily withhold cash payments pending correction of the deficiency by the district or more severe enforcement action by the federal awarding agency or pass-through entity.
2. Disallow (that is, deny both use of funds and any applicable matching credit for) all or part of the cost of the activity or action not in compliance.
3. Wholly or partly suspend or terminate the federal award.
4. Initiate suspension or debarment proceedings as authorized under 2 C.F.R. Part 180 and federal awarding agency regulations (or in the case of a pass-through entity, recommend such a proceeding be initiated by a federal awarding agency).
5. Withhold further federal awards for the project or program.
6. Take other remedies that may be legally available.

2 C.F.R. 200.339

Travel Costs

Travel costs are the expenses for transportation, lodging, subsistence, and related items incurred by employees who are in travel status on official business of the district. Such costs may be charged on an actual cost basis, on a per diem or mileage basis in lieu of actual costs incurred, or on a combination of the two, provided the method used is applied to an entire trip and not to selected days of the trip, and results in charges consistent with those normally allowed in like circumstances in the district's non-federally funded activities and in accordance with the district's written travel reimbursement policies.

In the absence of an acceptable, written district policy regarding travel costs, the rates and amounts established under 5 U.S.C. 5701-11 (Travel and Subsistence Expenses; Mileage Allowances), or by the administrator of general services, or by the president (or his or her designee) pursuant to any provisions of such subchapter must apply to travel under federal awards [48 C.F.R. 31.205–46(a)].

2 C.F.R. 200.475(a), (d)

*Property
Standards*

Federally
Owned Property

Title to federally owned property remains vested in the federal government. The district must submit annually an inventory listing of federally owned property in its custody to the federal awarding agency. Upon completion of the federal award or when the prop-

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erty is no longer needed, the district must report the property to the federal awarding agency for further federal agency utilization.

Exempt property means property acquired under a federal award where the federal awarding agency has chosen to vest title to the property to the district without further responsibility to the federal government, based upon the explicit terms and conditions of the federal award. The federal awarding agency may exercise this option when statutory authority exists. Absent statutory authority and specific terms and conditions of the federal award, title to exempt property acquired under the federal award remains with the federal government.

2 C.F.R. 200.312(a), (c)

Property Trust
Relationship

Real property, equipment, and intangible property that are acquired or improved with a federal award must be held in trust by the district as trustee for the beneficiaries of the project or program under which the property was acquired or improved. The federal awarding agency may require the district to record liens or other appropriate notices of record to indicate that personal or real property has been acquired or improved with a federal award and that use and disposition conditions apply to the property. *2 C.F.R. 200.316*

Real Property

Subject to the requirements and conditions set forth in 2 C.F.R. 200.311, title to real property acquired or improved under a federal award will vest upon acquisition in the district.

Except as otherwise provided by federal statutes or by the federal awarding agency, real property will be used for the originally authorized purpose as long as needed for that purpose, during which time the district must not dispose of or encumber its title or other interests.

When real property is no longer needed for the originally authorized purpose, the district must obtain disposition instructions from the federal awarding agency or pass-through entity. The instructions must provide for one of the following alternatives:

1. Retain title after compensating the federal awarding agency an amount determined under 2 C.F.R. 200.311(c)(1).
2. Sell the property and compensate the federal awarding agency an amount determined under 2 C.F.R. 200.311(c)(2).
3. Transfer title to the federal awarding agency or to a third party designated/approved by the federal awarding agency. The district is entitled to be paid an amount calculated by applying the district's percentage of participation in the purchase of the

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real property (and cost of any improvements) to the current fair market value of the property.

2 C.F.R. 200.311

Equipment
Title and Use

Subject to the requirements and conditions set forth in 2 C.F.R. 200.313, title to equipment acquired under a federal award will vest upon acquisition in the district. Unless a statute specifically authorizes the federal agency to vest title in the district without further responsibility to the federal government, and the federal agency elects to do so, the title must be a conditional title. Title must vest in the district subject to the following conditions:

1. Use the equipment for the authorized purposes of the project during the period of performance, or until the property is no longer needed for the purposes of the project.
2. Not encumber the property without approval of the federal awarding agency or pass-through entity.
3. Use and dispose of the property in accordance with the provisions below.

Equipment must be used by the district in the program or project for which it was acquired in accordance with 2 C.F.R. 200.313(c).

Procedures for managing equipment (including replacement equipment), whether acquired in whole or in part under a federal award, until disposition takes place will, as a minimum, meet the requirements of 2 C.F.R. 200.313(d).

Disposition

If the district is authorized or required to sell the property, proper sales procedures must be established to ensure the highest possible return.

When original or replacement equipment acquired under a federal award is no longer needed for the original project or program or for other activities currently or previously supported by a federal awarding agency, except as otherwise provided in federal statutes, regulations, or federal awarding agency disposition instructions, the district must request disposition instructions from the federal awarding agency if required by the terms and conditions of the federal award. Disposition of the equipment will be made as prescribed in 2 C.F.R. 200.313(e), in accordance with federal awarding agency disposition instructions.

2 C.F.R. 200.313

Supplies

Title to supplies will vest in the district upon acquisition. If there is a residual inventory of unused supplies exceeding \$5,000 in total aggregate value upon termination or completion of the project or pro-

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gram and the supplies are not needed for any other federal award, the district must retain the supplies for use on other activities or sell them, but must, in either case, compensate the federal government for its share. The amount of compensation must be computed in the same manner as for equipment under 2 C.F.R. 200.313(e)(2). *2 C.F.R. 200.314(a)*

Intangible
Property

Title to intangible property acquired under a federal award vests upon acquisition in the district. The district must use that property for the originally authorized purpose, and must not encumber the property without approval of the federal awarding agency. When no longer needed for the originally authorized purpose, disposition of the intangible property must occur in accordance with the provisions in 2 C.F.R. 200.313(e). *2 C.F.R. 200.315(a)*

Foreign
Telecommunications
Equipment

Recipients and subrecipients are prohibited from obligating or expending loan or grant funds in violation of 2 C.F.R. 200.216(a).

Direct Grant
Programs

The regulations in 34 C.F.R. Part 75 apply to each direct grant program of the ED. *34 C.F.R. 75.1*

State-Administered
Programs

The regulations in 34 C.F.R. Part 76 apply to each state-administered program of the ED. *34 C.F.R. 76.1*

General Education
Provision Act

The regulations in 34 C.F.R. Part 81 govern the enforcement of legal requirements under applicable programs administered by the ED and implement Part E of the General Education Provisions Act (GEPA). *34 C.F.R. 81.1*

¹ TEA EDGAR Materials and Resources:
https://tea.texas.gov/Finance_and_Grants/Grants/EDGAR_Materials_and_Resources/

² ED EDGAR website:
<https://www2.ed.gov/policy/fund/reg/edgarReg/edgar.html>

³ ED Uniform Guidance website:
<https://www2.ed.gov/policy/fund/guid/uniform-guidance/index.html>

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**Bonds and Bond
Taxes**

The board may issue bonds for:

1. The construction, acquisition, and equipment of school buildings in the district;
2. The acquisition of property or the refinancing of property under a contract entered under the Public Property Finance Act (Local Government Code, Chapter 271, Subchapter A), regardless of whether payment obligations under the contract are due in the current year or a future year;
3. The purchase of the necessary sites for school buildings;
4. The purchase of new school buses;
5. The retrofitting of school buses with emergency, safety, or security equipment; and
6. The purchase or retrofitting of vehicles to be used for emergency, safety, or security purposes.

The board may levy, pledge, assess, and collect annual ad valorem taxes sufficient to pay the principal of and interest on the bonds as or before the principal and interest become due, subject to the provisions at Bond Elections, below.

Education Code 45.001(a)

All bonds shall be issued in accordance with the Public Security Procedures Act. *Gov't Code, Ch. 1201*

Limitation

A district may not issue general obligation bonds to purchase, improve, or construct one or more improvements to real property, to purchase one or more items of personal property, or to do both, if the weighted average maturity of the issue of bonds exceeds 120 percent of the reasonably expected weighted average economic life of the improvements and personal property financed with the issue of bonds. *Gov't Code 1253.002*

Use of Proceeds for
Utilities

The proceeds of bonds issued by school districts for the construction and equipment of school buildings in the district and the purchase of the necessary sites for school buildings may be used, among other things, to pay the cost of acquiring, laying, and installing pipes or lines to connect with the water, sewer, or gas lines of a municipality or private utility company, whether or not the water, sewer, or gas lines adjoin the school, so that the school district may provide its public school buildings the water, sewer, or gas services. *Education Code 45.101*

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State Facilities
Funding

*Instructional
Facilities
Allotment*

“Instructional facility” means real property, an improvement to real property, or a necessary fixture of an improvement to real property that is used predominantly for teaching the required curriculum.

Education Code 46.001

Under the Instructional Facilities Allotment, Education Code Chapter 46, Subchapter A, for each year, except as provided by Education Code 46.005 (limitation on the guaranteed amount) and 46.006 (shortage or excess of appropriated funds), a district is guaranteed a specified amount per student in state and local funds for each cent of tax effort, up to the statutory maximum in Education Code 46.003(b), to pay the principal of and interest on eligible bonds issued to construct, acquire, renovate or improve an instructional facility. *Education Code 46.003(a)* [See 19 Administrative Code 61.1032 for commissioner’s rules related to the instructional facilities allotment.]

*Existing Debt
Allotment*

A district is guaranteed a specified amount per student in state and local funds for each cent of tax effort to pay the principal and interest on eligible bonds under Education Code Chapter 46, Subchapter B. Bonds are eligible to be paid with state and local funds under Subchapter B if the district made payments on the bonds during the final school year of the preceding state fiscal biennium or taxes levied to pay the principal and interest on the bonds were included in a district’s audited debt service collections for that school year, and the district does not receive state assistance under the Instructional Facilities Allotment for payment of the principal and interest on the bonds. *Education Code 46.032(a), .033* [See 19 Administrative Code 61.1035 for commissioner’s rules related to the existing debt allotment.]

Note: For information on the new instructional facility allotment, see CBA.

Investment of Bond
Proceeds

For legal requirements regarding investment of bond proceeds, see CDA(LEGAL).

Unspent Bond
Proceeds

A district may use unspent proceeds of issued general obligation bonds only:

1. For the specific purposes for which the bonds were authorized;
2. To retire the bonds; or
3. For a purpose other than the specific purposes for which the bonds were authorized if:
 - a. The specific purposes are accomplished or abandoned; and

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- b. The board at a public meeting held only for the purpose of considering the use of the unspent bond proceeds approves in separate votes the use of the proceeds for:
 - (1) A purpose other than to retire the bonds; and
 - (2) The purpose specified at the time the vote is taken.

In addition to other requirements, notice of a public meeting held under this provision must include a statement that the board will consider the use of unspent bond proceeds for a purpose other than the specific purposes for which the bonds were authorized. A public meeting held under this provision must provide the public an opportunity to address the board on the question of using the unspent bond proceeds for a purpose other than the specific purposes for which the bonds were authorized.

Education Code 45.1105

**Capital Appreciation
Bonds**

For purposes of the following policy provisions, a “capital appreciation bond” is a bond that accrues and compounds interest from its date of delivery, the interest on which by its terms is payable only upon maturity or prior redemption.

Limitation on
Issuance

A school district may not issue capital appreciation bonds that are secured by ad valorem taxes unless:

- 1. The bonds have a scheduled maturity date that is not later than 20 years after the date of issuance;
- 2. The board has received a written estimate of the cost of the issuance, including:
 - a. The amount of principal and interest to be paid until maturity;
 - b. The amount of fees to be paid to outside vendors, including vendors who sell products to be financed by the bond issuance;
 - c. The amount of fees to be paid to each financing team member; and
 - d. The projected tax impact of the bonds and the assumptions on which the calculation of the projected tax impact is based;
- 3. The board has determined in writing whether any personal or financial relationship exists between the members of the board and any financial advisor, bond counsel, bond underwriter, or other professional associated with the bond issuance and submitted the determination to the Ethics Commission; and

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4. The board posts prominently on the district's internet website and enters in the minutes of the board:
 - a. The total amount of the proposed bonds;
 - b. The length of maturity of the proposed bonds;
 - c. The projects to be financed with bond proceeds;
 - d. The intended use of bond proceeds not spent after completion of the projects identified;
 - e. The total amount of the district's outstanding bonded indebtedness at the time of the election on the bonds, including the amount of principal and interest to be paid on existing bond indebtedness until maturity;
 - f. The total amount of the district's outstanding bonded indebtedness, including the amount of principal and interest to be paid until maturity; and
 - g. The information received at item 2 above and determined under item 3 above.

The board shall regularly update the debt information posted on the district's internet website under item 4.f above to ensure that the information is current and accurate.

Limitation on Use of
Proceeds

Capital appreciation bond proceeds may not be used to purchase the following items, unless an item has an expected useful life that exceeds the bond's maturity date:

1. Items more regularly considered maintenance items, including replacement HVAC units, upgraded plumbing, or similar items; or
2. Transportation-related items, including buses.

*Unspent
Proceeds*

Capital appreciation bond proceeds unspent after completion of the project identified as the proceeds' intended use may be used only for a use identified on the district's website as required above, unless another use is approved by the voters of the district at an election held for that purpose.

Total Amount of
Capital Appreciation
Bonds

The total amount of capital appreciation bonds may not exceed 25 percent of the district's total outstanding bonded indebtedness at the time of the issuance, including the amount of principal and interest to be paid on the outstanding bonds until maturity.

Extension

A district may not extend the maturity date of an issued capital appreciation bond, including through the issuance of refunding bonds that extend the maturity date, unless:

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1. The extension of the maturity date will decrease the total amount of projected principal and interest to maturity; or
2. The maximum legally allowable tax rate for indebtedness has been adopted and TEA certifies in writing that the solvency of the permanent school fund's bond guarantee program would be threatened without the extension.

Gov't Code 1201.0245

The foregoing provisions of Government Code 1201.0245 do not apply to the issuance of refunding bonds under Government Code Chapter 1207 or capital appreciation bonds for the purpose of financing transportation projects. *Gov't Code 1201.0245(j)*

Bond Elections

Bonds may not be issued and taxes may not be levied unless authorized by a majority of the qualified voters of the district, voting at an election held for such purpose, at the expense of the district, in accordance with the Election Code, except as provided by Education Code 45.003. The election shall be called by resolution or order of the board. The resolution or order must state the date of the election, the proposition or propositions to be submitted and voted on, the polling place or places, and any other matters considered necessary or advisable by the board. *Education Code 45.003(a)*

Each special election in this state shall be held on one of the following dates:

1. The first Saturday in May; or
2. The first Tuesday after the first Monday in November.

Election Code 41.001(a) [See BBB]

Call for Election

For an election to be held on a uniform election date, the election shall be ordered not later than the 78th day before election day. *Election Code 3.005* [See BBBA]

Election Order

In addition to other legal requirements regarding the election order [see BBBA(LEGAL)], the document ordering an election to authorize a district to issue debt obligations must distinctly state:

1. The proposition language that will appear on the ballot;
2. The purpose for which the bonds are to be authorized;
3. The principal amount of the bonds to be authorized;
4. That taxes sufficient to pay the principal of and interest on the bonds may be imposed;

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5. The estimated tax rate if the bonds are authorized or the maximum interest rate of the bonds or any series of the bonds, based on the market conditions at the time of the election order;
6. The maximum maturity date of the bonds to be authorized or that the bonds may be issued to mature over a specified number of years not to exceed the maximum number of years authorized by law;
7. The aggregate amount of the outstanding principal of the district's debt obligations as of the date the election is ordered;
8. The aggregate amount of the outstanding interest on the district's debt obligations as of the date the election is ordered, which may be based on the district's expectations relative to variable rate debt obligations; and
9. The district's ad valorem debt service tax rate at the time the election is ordered, expressed as an amount per \$100 valuation of taxable property.

Election Code 3.009(b)

Posting

The election order must be posted:

1. On election day and during early voting by personal appearance, in a prominent location at each polling place;
2. Not later than the 21st day before the election in three public places in the boundaries of the district; and
3. During the 21 days before the election, on the district's internet website, prominently and together with the notice of the election, the contents of the proposition, and any sample ballot prepared for the election, if the district maintains an internet website.

Election Code 4.003(f) [See Voter Information, below]

Election Notice

The notice of election must comply with Election Code Chapter 4. [For specific requirements regarding contents of the election notice, see BBBA(LEGAL).]

*Publication and
Posting*

The notice of election must be published and posted in accordance with Election Code requirements. [For specific requirements regarding publication and posting, see BBBA(LEGAL).]

*Notice to Election
Officials*

Notice must be given to the county clerk, voter registrar, and election judge in accordance with Election Code Chapter 4. [For specific requirements, see BBBA(LEGAL).]

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Propositions

A proposition submitted to authorize the issuance of bonds must include the question of whether the board may levy, pledge, assess, and collect annual ad valorem taxes, on all taxable property in the district, either:

1. Sufficient, without limits as to rate or amount, to pay the principal of and interest on said bonds; or
2. Sufficient to pay the principal of and interest on the bonds, provided that the annual aggregate bond taxes in the district may never be more than the rate stated in the proposition.

The ballot proposition must include the following statement: "THIS IS A PROPERTY TAX INCREASE."

Education Code 45.003(b), (b-1)

A district that submits to the voters a proposition for the approval of the issuance of debt obligations shall prescribe the wording of the proposition that is to appear on the ballot in accordance with the requirements of Government Code Chapter 1251, Subchapter B. *Election Code 52.072(f)*

The district shall assign a letter to each measure on the ballot that corresponds to its order on the ballot. Each proposition on the ballot must identify the name of the authority ordering the election on the measure. *Election Code 52.095*

Ballot Contents

The ballot for a measure seeking voter approval of the issuance of debt obligations by a district shall specifically state:

1. A plain language description of the single specific purposes for which the debt obligations are to be authorized;
2. The total principal amount of the debt obligations to be authorized; and
3. That taxes sufficient to pay the principal of and interest on the debt obligations will be imposed.

Each single specific purpose for which debt obligations requiring voter approval are to be issued must be printed on the ballot as a separate proposition. A proposition may include as a specific purpose one or more structures or improvements serving the substantially same purpose and may include related improvements and equipment necessary to accomplish the specific purpose.

Gov't Code 1251.052(a)–(a-1)

Exception

Notwithstanding the requirements at Ballot Contents, above, the question of whether to approve the issuance of bonds for the construction, acquisition, and equipment of school buildings in the dis-

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trict, the purchase of new school buses, and the purchase of necessary sites for school buildings may be submitted to the voters in a single ballot proposition, except that bonds for each of the following purposes must be stated in a separate proposition:

1. The construction, acquisition, or equipment of:
 - a. A stadium with seating capacity for more than 1,000 spectators;
 - b. A natatorium;
 - c. Another recreational facility other than a gymnasium, playground, or play area;
 - d. A performing arts facility;
 - e. Housing for teachers as determined by the district to be necessary to have a sufficient number of teachers for the district; and
2. An acquisition or update of technology equipment, other than equipment used for school security purposes or technology infrastructure integral to the construction of a facility.

The question of whether to approve the issuance of bonds for a building described by items 1a–e above must be printed on the ballot as a separate ballot proposition regardless of whether that building is proposed as part of the same complex or building that contains traditional classroom facilities. Each separate ballot proposition must state the principal amount of the bonds to be issued that constitutes the cost for construction of that portion of the building or complex attributable to the building described by items 1a–e above or to the traditional classroom facilities, as applicable.

Education Code 45.003(g)–(h)

Definition

"Debt obligation" means a public security, as defined by Government Code 1201.002, secured by and payable from ad valorem taxes. The term does not include public securities that are designated as self-supporting by the political subdivision issuing the securities. *Gov't Code 1251.051(1)*

Voter Information

A district with at least 250 registered voters on the date the board adopts the debt obligation election order must prepare a voter information document for each proposition to be voted on at the election.

*Posting
Requirements*

The district shall post the voter information document in the same manner as a debt obligation election order is required to be posted under Election Code 4.003(f) [see Posting, above] and may include

the voter information document in the debt obligation election order.

A district that maintains an internet website shall provide the information described at Contents, below, on its website in an easily accessible manner beginning not later than the 21st day before election day and ending on the day after the date of the debt obligation election.

Contents

The voter information document must distinctly state:

1. The language that will appear on the ballot;
2. The following information formatted as a table:
 - a. The principal of the debt obligations to be authorized;
 - b. The estimated interest for the debt obligations to be authorized;
 - c. The estimated combined principal and interest required to pay on time and in full the debt obligations to be authorized; and
 - d. As of the date the district adopts the debt obligation election order:
 - (1) The principal of all outstanding debt obligations of the district;
 - (2) The estimated remaining interest on all outstanding debt obligations of the district, which may be based on the district's expectations relative to the interest due on any variable rate debt obligations; and
 - (3) The estimated combined principal and interest required to pay on time and in full all outstanding debt obligations of the district, which may be based on the district's expectations relative to the interest due on any variable rate debt obligations;
3. The estimated maximum annual increase in the amount of taxes that would be imposed on a residence homestead in the district with an appraised value of \$100,000 to repay the debt obligations to be authorized, if approved, based upon assumptions made by the board; and
4. Any other information that the board considers relevant or necessary to explain the information required by these provisions.

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Assumptions

The board shall identify in the voter information document the major assumptions made in connection with the statement required by item 3 above, including:

1. The amortization of the district's debt obligations, including outstanding debt obligations and the proposed debt obligations;
2. Changes in estimated future appraised values within the district; and
3. The assumed interest rate on the proposed debt obligations.

Gov't Code 1251.052(b)–(d)

Electioneering and
Political Advertising

For additional information and prohibitions related to electioneering and political advertising, see BBBD(LEGAL).

**50 Cent Test for New
Debt**

Before issuing bonds, a district must demonstrate to the attorney general that, with respect to the proposed issuance, the district has a projected ability to pay the principal of and interest on the proposed bonds and all previously issued bonds, other than bonds authorized to be issued at an election held on or before April 1, 1991, and issued before September 1, 1992, from a tax at a rate not to exceed \$0.50 per \$100 of valuation (the "50 Cent Test").

A district may demonstrate the ability to comply with the 50 Cent Test by using the most recent taxable value of property in the district, combined with state assistance to which the district is entitled under Education Code Chapter 46 or 48 that may be lawfully used for the payment of bonds.

Future Taxable
Value

A district may demonstrate the ability to comply with the 50 Cent Test by using a projected future taxable value of property in the district anticipated for the earlier of the tax year five years after the current tax year or the tax year in which the final payment is due for the bonds submitted to the attorney general, combined with state assistance to which the district is entitled under Education Code Chapter 46 or 48 that may be lawfully used for the payment of bonds.

The district must submit to the attorney general a certification of the district's projected taxable value prepared by a registered, certified professional appraiser who has demonstrated professional experience in projecting taxable values or who can obtain any necessary assistance from an experienced person.

The certification of a district's projected taxable value must be signed by the superintendent. The attorney general must base a determination of whether a district has complied with the 50 Cent

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Test on a taxable value that is equal to 90 percent of the value certified.

Education Code 45.0031

**Attorney General
Review and Approval**

Unless exempt under Government Code 1202.007, before the issuance of a public security, the issuer shall submit the public security and the record of proceedings to the attorney general. *Gov't Code 1202.003(a); see, e.g., 1 TAC 53.3 (Content of Transcripts), 53.16 (Submission and Approval of Transcripts), and 53.61 (School District Tax Bond Elections)*

Refunding Bonds

A board may refund or refinance all or any part of any of the district's outstanding bonds and matured or unmatured but unpaid interest on those bonds payable from ad valorem taxes by issuing refunding bonds payable from ad valorem taxes. *Education Code 45.004; Gov't Code Ch. 1207*

Instructional
Facilities Allotment
for Refunding
Bonds

A district may use state funds received under Education Code Chapter 46 to pay principal of and interest on refunding bonds that:

1. Are issued to refund bonds eligible under Education Code 46.003;
2. Do not have a final maturity date later than the final maturity date of the bonds being refunded;
3. May not be called for redemption earlier than the earliest call date of all bonds being refunded; and
4. Result in a present value savings as defined in Education Code 46.007(4).

Education Code 46.007

**Authorized Unissued
Bonds**

If a district has authorized school bonds for a specific purpose and that purpose has been accomplished by other means or has been abandoned and all or a portion of the authorized bonds remains unissued, a board may order an election [see BBBA] to submit to the qualified voters of the district the proposition of whether or not the authorized but unissued bonds may be issued, sold, and delivered for other and different purposes specified in the election order and notice. The election shall be ordered, held, and conducted in the same form and manner as that at which the bonds were originally authorized. If a majority of those voting at the election vote in favor of the sale and delivery of the unissued bonds for the purposes specified in the election order and notice, the board may issue, sell, and deliver the bonds and use the proceeds for the purposes authorized at the election. *Education Code 45.110*

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**Bond Guarantee
Program**

Eligibility

A district seeking guarantee of eligible bonds under the Bond Guarantee Program shall apply to the commissioner of education using a form adopted by the commissioner. To be eligible for approval, district bonds must be issued under Education Code Chapter 45, Subchapter A, or under Government Code Chapter 1207. *Education Code 45.054, .055(a); 19 TAC 33.6(b)(5)*

Application

An application must include:

1. The name of the district and the principal amount of the bonds to be issued;
2. The name and address of the district's paying agent, which means the financial institution designated by a district as its agent for payment of principal and interest on guaranteed bonds; and
3. The maturity schedule, estimated interest rate, and date of the bonds.

Education Code 45.051(2), .055

An application must be accompanied by a fee set by rule of the State Board of Education. *Education Code 45.055(c); 19 TAC 33.6(f)(1)*

On approval by the commissioner, bonds issued by a district are guaranteed by the corpus and income of the permanent school fund. The guarantee remains in effect until the date those bonds mature or are defeased in accordance with state law. *Education Code 45.052*

If a district does not receive approval for the guarantee or for any reason does not receive approval of the bonds from the attorney general within the specified time period, the district may reapply in a subsequent month. Applications that were denied approval for the guarantee will not be retained for consideration in subsequent months. *19 TAC 33.6(f)(5)*

A district may not represent bonds as guaranteed for the purpose of pricing or marketing the bonds before the date of the letter granting approval for the guarantee. *19 TAC 33.6(g)(4)(D)*

**Credit Enhancement
Program**

If a district's application for guarantee of district bonds by the permanent school fund is rejected, the district may apply under Education Code Chapter 45, Subchapter I for credit enhancement of bonds described by Education Code 45.054 (eligibility for the Bond Guarantee Program) by money appropriated for the Foundation School Program, other than money that is appropriated to districts specifically:

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1. As required under the Texas Constitution; or
2. For assistance in paying debt service.

The credit enhancement remains in effect until the date the bonds mature or are defeased in accordance with state law.

Education Code 45.252

Eligibility

To be eligible for approval by the commissioner for credit enhancement:

1. Bonds must be issued in the manner provided by Education Code 45.054;
2. Payments of all of the principal of the bonds must be scheduled during the first six months of the state fiscal year;
3. The district's lowest credit rating from any credit rating agency may not be the same as or higher than that of the School District Bond Enhancement Program;
4. The bonded debt for which the credit enhancement is sought must be structured so that no single annual debt service payment exceeds two times the quotient produced by dividing the total proposed annual debt service, as defined in 19 Administrative Code 61.1038(b)(10), for the term of the bonds by the number of years in the amortization schedule; and
5. The district must agree in its application that the total annual debt service on bonds approved for the credit enhancement will be paid on or before August 15 of each state fiscal year.

Education Code 45.254; 19 TAC 61.1038(f)

Application

A district seeking credit enhancement of eligible bonds shall apply to the commissioner using a form adopted by the commissioner for the purpose. The application must:

1. Include the information required by Education Code 45.055(b), at Bond Guarantee Program—Application, above; and
2. Be accompanied by a fee set by the State Board of Education. 19 TAC 61.1038(d)(1)

Education Code 45.255

The district may not submit an application for a guarantee or credit enhancement before the successful passage of an authorizing proposition.

LOCAL REVENUE SOURCES
BOND ISSUES

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If a district does not receive a credit enhancement or for any reason does not receive approval of the bonds from the attorney general within the specified time period, the district may reapply in a subsequent month. Applications that were denied a credit enhancement will not be retained for consideration in subsequent months.

A district may not represent the bonds as approved for credit enhancement for the purposes of pricing or marketing the bonds before the date of the letter granting approval for the credit enhancement.

19 TAC 61.1038(e)(1), (8), (10)

**Authority to Contract
for Services**

An issuer has exclusive authority to select, contract with, and determine the basis for compensation of a person to provide legal and other services as may be determined by the issuer to be necessary in connection with the issuer's issuance of public securities or administration of its affairs that pertain to the issuance of public securities. The selection of legal counsel shall be made in accordance with the provisions of Government Code Chapter 2254, Subchapter A, applicable to the selection by a governmental entity of a provider of professional engineering services. *Government Code 1201.027(a)* [See CH(LEGAL) regarding contingent fee contracts for legal services and Government Code 2254.102(e) for additional requirements.]

**Federal Securities
Law**

Disclosure
Obligations for
Bond and Other
Debt Offerings

Prior to publicly offering bonds, a school district must prepare and deliver to an underwriter an official statement containing the terms of the bond offering, a description of the district itself, financial and operating data of the district, and any other information that may be material to an investor interested in purchasing the district's bonds or otherwise required by Rule 15c2-12 of the Securities Exchange Commission (SEC) (SEC Rule 15c2-12(b)). *17 C.F.R. 240.15c2-12* [See Note, below]

Continuing
Disclosure after
Issuing Bonds

Except for exempt offerings, SEC Rule 15c2-12(b) requires underwriters to obtain a continuing disclosure agreement (CDA) from the district when the district issues bonds. A CDA obligates the district to prepare and file continuing disclosures of financial information and operating data annually after the bonds are issued. A CDA also requires filing notice regarding the occurrence of events listed under SEC Rule 15c2-12(b)(5)(i)(C) within 10 business days following the occurrence of any such event. *17 C.F.R. 240.15c2-12* [See Note, below]

Liability under
Federal Securities
Law

School districts, board members, and certain employees of the district are subject to liability under the antifraud provisions of the federal securities laws contained in Section 17(a) of the Securities Act

of 1933 (the “Securities Act”), Section 10(b) of the Securities Exchange Act of 1934 (the “Exchange Act”) and Rule 10b-5 of the SEC. The antifraud provisions generally prohibit false or misleading statements made in connection with the offer or sale of a district’s bonds (or the omission of material facts from such statements), including the official statement itself and any other statement reasonably expected to reach bond investors (disclosures). *SEC Exchange Act Release No. 33741 (Mar. 9, 1994)*

The antifraud provisions also apply to a district’s continuing disclosure obligations under SEC Rule 15c2-12(b) after a district’s bonds are issued. [See Continuing Disclosure after Issuing Bonds, above] *SEC Report on the Municipal Securities Market (July 31, 2012) (the “SEC 2012 Report”) at pg. 29*

Note: In preparing an official statement, a district may reasonably rely on the advice of outside professionals who are also subject to the antifraud provisions, but a district is primarily liable for the content of its official statement and other disclosures. *SEC Exchange Act Release No. 36761 (Jan. 24, 1996)*

A district may engage qualified consultants, including qualified disclosure or securities counsel and a financial adviser, to assist with preparing an official statement and other primary disclosures relating to a bond offering. Creation of internal procedures may help to insulate a district against criticism or liability under federal securities laws.

Districts may also engage disclosure counsel and/or other professionals to assist with secondary disclosure, including advice and assistance ensuring that (1) reporting requirements imposed by a CDA are satisfied and (2) information disclosed in periodic and occasional reports is accurate and complete.

Internal procedures may provide for (1) appointment of, and disclosure training for, district officials and employees who will be part of the financing team, (2) a procedure of accountability for review of the disclosures, and (3) ensuring that any procedures established are in fact followed.

[See SEC Report on the Municipal Securities Market (July 31, 2012)]

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Note: For more information on property tax exemptions, see the Texas Comptroller's [Property Tax Exemptions](#)¹ website.

Exemptions

Homestead

Mandatory

An adult is entitled to exemption from taxation by a district of \$40,000 of the appraised value of the adult's residence homestead, as defined by Tax Code 11.13(j), except that only \$5,000 of the exemption applies to an entity operating under former Education Code Chapters 17, 18, 25, 26, 27, or 28, as those chapters existed on May 1, 1995, as permitted by Education Code 11.301. *Tax Code 11.13(b)*

*Persons 65 or
Older or Disabled*

In addition to the mandatory exemption above, an adult who is disabled, as defined by Tax Code 11.13(m)(1), or 65 or older is entitled to an exemption of \$10,000 of the appraised value of the individual's residence homestead. *Tax Code 11.13(c)*

Tax Limitation

A district may not increase the total annual amount of ad valorem tax it imposes on the residence homestead of an individual 65 years of age or older, or on the residence homestead of an individual who is disabled, above the amount of the tax it imposed in the first tax year in which the individual qualified that residence homestead for an applicable exemption. *Tax Code 11.26(a)*

Improvements

If an individual subject to a tax limitation makes improvements to the individual's residence homestead, other than improvements required to comply with governmental requirements or repairs, the district may increase the tax on the homestead in the first year the value of the homestead is increased on the appraisal roll because of the enhancement of value by the improvements. A limitation then applies to the increased amount of tax until more improvements, if any, are made. *Tax Code 11.26(b)*

Exception

An improvement to property that would otherwise constitute an improvement discussed above is not treated as an improvement if it is a replacement structure for a structure that was rendered uninhabitable or unusable by a casualty or by wind or water damage. For purposes of appraising the property in the tax year in which the structure would have constituted an improvement, the replacement structure is considered to be an improvement only if the square footage of the replacement structure exceeds that of the replaced structure as that structure existed before the casualty or damage occurred or the exterior of the replacement structure is of higher quality construction and composition than that of the replaced structure. *Tax Code 11.26(o)*

AD VALOREM TAXES
EXEMPTIONS AND PAYMENTS

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Portability of Tax Limitation	If an individual who receives a tax limitation, including a surviving spouse, discussed below, subsequently qualifies a different residence homestead for the same exemption, a district may not impose ad valorem taxes on the subsequently qualified homestead in a year in an amount that exceeds the amount of taxes calculated in accordance with Tax Code 11.26(g). <i>Tax Code 11.26(g)</i>
Surviving Spouse	If an individual who qualifies for the exemption at Persons 65 or Older or Disabled, above, dies, the surviving spouse of the individual is entitled to the limitation applicable to the residence homestead of the individual if the surviving spouse is 55 years of age or older when the individual dies, and the residence homestead of the individual is the residence homestead of the surviving spouse on the date that the individual dies and remains the residence homestead of the surviving spouse. <i>Tax Code 11.26(i)</i>
<i>Local Options</i> All Taxpayers	In addition to other exemptions in Tax Code 11.13, an individual is entitled to an exemption from taxation by a district of a percentage of the appraised value of the individual's residence homestead if the exemption is adopted by the board before July 1 in the manner provided by law for official action by the board. If the percentage set by the district produces an exemption in a tax year of less than \$5,000 when applied to a particular residence homestead, the individual is entitled to an exemption of \$5,000 of the appraised value. The percentage adopted by the district may not exceed 20 percent. <i>Tax Code 11.13(n)</i>
Disabled or 65 or Older	An individual who is disabled or 65 or older is entitled to an exemption from taxation by a district of a portion of the appraised value of the individual's residence homestead if the exemption is adopted either by the board or by a favorable vote of a majority of the qualified voters of the district at an election called by the board, and the board shall call the election on the petition of at least 20 percent of the number of qualified voters who voted in the preceding election of the district.
<i>Amount</i>	The amount of an exemption adopted as provided at Disabled or 65 or Older is \$3,000 of the appraised value of the residence homestead unless a larger amount is specified by the board if the board authorizes the exemption or the petition for the election if the exemption is authorized through an election. Once authorized, an exemption adopted may be repealed or decreased or increased in amount by the board or by the petition and election procedure. In the case of a decrease, the amount of the exemption may not be reduced to less than \$3,000 of the market value. <i>Tax Code 11.13(d)–(f)</i>

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<i>Continuation of Exemption during Construction</i>	If a qualified residential structure for which the owner receives a homestead exemption under Tax Code 11.13 is rendered uninhabitable or unusable by a casualty or by wind or water damage, the owner may continue to receive the exemption for the structure and the land and improvements used in the residential occupancy of the structure while the owner constructs a replacement qualified residential structure on the land in accordance with Tax Code 11.135. <i>Tax Code 11.135(a), .26(n); 34 TAC 9.416</i>
<i>Surviving Spouse of First Responder</i>	The surviving spouse of a first responder who is killed or fatally injured in the line of duty is entitled to an exemption from taxation of the total appraised value of the surviving spouse's residence homestead if the surviving spouse is an eligible survivor for purposes of Government Code Chapter 615 as determined by the Employees Retirement System of Texas and has not remarried since the first responder's death. <i>Tax Code 11.134</i>
Veteran Exemptions	
<i>100 Percent Disabled</i>	A disabled veteran who has been awarded by the U.S. Department of Veterans Affairs or its successor 100 percent disability compensation due to a service-connected disability and a rating of 100 percent disabled or of individual unemployability is entitled to an exemption from taxation of the total appraised value of the veteran's residence homestead. <i>Tax Code 11.131(b)</i>
<i>Partially Disabled with Donated Residence</i>	A disabled veteran who has a disability rating of less than 100 percent is entitled to an exemption from taxation of a percentage of the appraised value of the disabled veteran's residence homestead equal to the disabled veteran's disability rating if the residence homestead was donated to the disabled veteran by a charitable organization at no cost to the disabled veteran, or at some cost to the disabled veteran in the form of a cash payment, a mortgage, or both in an aggregate amount that is not more than 50 percent of the good faith estimate of the market value of the residence homestead made by the charitable organization as of the date of the donation. <i>Tax Code 11.132(b)</i>
<i>Surviving Spouse of Veteran</i>	The surviving spouse of a disabled veteran, as defined by Tax Code 11.22(h)(3), is entitled to the same exemption from taxation of the same property to which the disabled veteran's exemption applied or would have applied if it had been in effect on the date of death if: 1. The surviving spouse has not remarried since the death of the disabled veteran; and

2. The property was the residence homestead of the surviving spouse when the disabled veteran died and remains the residence homestead of the surviving spouse.

Tax Code 11.131(c), .132(c)

*Surviving Spouse
of Individual
Killed in Action*

The surviving spouse of a member of the armed services of the United States who is killed or fatally injured in the line of duty is entitled to an exemption from taxation of the total appraised value of the surviving spouse's residence homestead if the surviving spouse has not remarried since the death of the member of the armed services. *Tax Code 11.133(b)*

Tex. Const. Art. VIII, Sec. 1-b (Residence Homestead Tax Exemptions and Limitations)

Disabled Veteran

A disabled veteran is entitled to an exemption from taxation of a portion of the assessed value of a property the veteran owns and designates under Tax Code 11.22(f). *Tax Code 11.22*

Exemption for
Subsequent
Residence

The surviving spouse of a first responder, disabled veteran, or armed services member killed in action who receives an exemption for a residence homestead is entitled to receive an exemption from taxation of a different property that the surviving spouse subsequently qualifies as the surviving spouse's residence homestead in an amount equal to the dollar amount of the exemption from taxation of the first property for which the surviving spouse received the exemption in the last year in which the surviving spouse received that exemption if the surviving spouse has not remarried. *Tax Code 11.131(d), .132(d), .133(c), .134(d)*

Temporary
Exemption for
Property Damaged
by Disaster

A person is entitled to an exemption from taxation by a district of a portion of the appraised value of qualified property, as defined by Tax Code 11.35(a), that the person owns in an amount determined by the chief appraiser under Tax Code 11.35(h). *Tax Code 11.35(b)*

A person who qualifies for an exemption under this provision must apply for the exemption not later than the 105th day after the date the governor declares the area in which the person's qualified property is located to be a disaster area. *Tax Code 11.43(s)*

"Damage" means physical damage. *Tax Code 11.35(a)(1)*

Optional
Exemptions

Among others, a board may grant additional tax exemptions in accordance with applicable law for:

1. Residential property owned by the United States or an agency of the United States and used to provide transitional housing for the indigent under a program operated or directed by the

U.S. Department of Housing and Urban Development. *Tax Code 11.111*

2. Land and housing units on the land owned by a community land trust. *Tax Code 11.1827*
3. Certain historic structures or archeological sites and the land necessary to access and use the structure or archeological site. The board may not repeal or reduce the amount of an exemption for a property that otherwise qualifies for the exemption unless the property owner consents to the repeal or reduction or the district provides written notice of the repeal or reduction to the owner not later than five years before the date the board repeals or reduces the exemption. *Tax Code 11.24*
4. Property on which approved water conservation initiatives, desalination projects, or brush control initiatives have been implemented. *Tax Code 11.32*

If a district adopts, amends, or repeals an exemption that the district by law has the option to adopt or not, the district shall notify the appraisal office of its action and of the terms of the exemption within 30 days after the date of its action. *Tax Code 6.08*

Goods-in-Transit
Exemption

A person is entitled to an exemption from taxation of the appraised value of that portion of the person's property that consists of goods-in-transit, as defined in Tax Code 11.253(a)(2). *Tax Code 11.253(b)*

[For information on the board's option in a district located in a disaster area to extend the date by which goods-in-transit must be transported, see Tax Code 11.253(l).]

Option to Tax

A board, by official action, may provide for the taxation of goods-in-transit exempt under Tax Code 11.253(b) and not exempt under other law. The official action to tax the goods-in-transit must be taken before January 1 of the first tax year in which the board proposes to tax goods-in-transit. Before acting to tax the exempt property, a board must conduct a public hearing as required by Texas Constitution Article VIII, Section 1-n(d). If the board provides for the taxation of the goods-in-transit as provided by this provision, the exemption stated above does not apply to that district. The goods-in-transit remain subject to taxation by the district until the board, by official action, rescinds or repeals its previous action to tax goods-in-transit, or otherwise determines that the exemption will apply to that district.

Notwithstanding official action that was taken before October 1, 2011, to tax goods-in-transit, a district may not tax such goods-in-

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transit in a tax year that begins on or after January 1, 2012, unless the board takes official action on or after October 1, 2011, to provide for the taxation of the goods-in-transit.

Exception

If a board, before October 1, 2011, took action to provide for the taxation of goods-in-transit and pledged the taxes imposed on the goods-in-transit for the payment of a debt of the district, the district tax officials may continue to impose the taxes against the goods-in-transit until the debt is discharged, if cessation of the imposition would impair the obligation of the contract by which the debt was created.

Tax Code 11.253(j)–(j-2)

Payment Options

Discounts

The board may adopt, by official action, one or both of the discount options below. *Tax Code 31.05(a)*

Option 1

A district may adopt the following discounts to apply regardless of the date on which the district mails its tax bills:

1. Three percent if the tax is paid in October or earlier.
2. Two percent if the tax is paid in November.
3. One percent if the tax is paid in December.

Tax Code 31.05(b)

This discount does not apply to taxes that are calculated too late for it to be available. *Tax Code 31.04(c)*

Option 2

A district may adopt the following discounts to apply when the district mails its tax bills after September 30:

1. Three percent if the tax is paid before or during the next full calendar month following the date on which the tax bills were mailed.
2. Two percent if the tax is paid during the second full calendar month following the date on which the tax bills were mailed.
3. One percent if the tax is paid during the third full calendar month following the date on which the tax bills were mailed.

Tax Code 31.05(c)

Both Options

If a board adopts both discounts, the discounts described at Option 1 apply unless the tax bills for the district are mailed after September 30, in which case only the discounts described at Option 2 apply. *Tax Code 31.05(a)*

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<i>Rescission</i>	The board may rescind a discount lawfully adopted by the board. The rescission of a discount takes effect in the tax year following the year in which the discount is rescinded. <i>Tax Code 31.05(d)</i>
Split Payments	The board of a district that collects its own taxes may provide, by official action, that a person who pays one-half of the district's taxes before December 1 may pay the remaining one-half of the taxes without penalty or interest at any time before July 1 of the following year. If a board contracts with the appraisal district for collection of taxes, the split-payment option does not apply to taxes collected by the appraisal district unless approved by resolution adopted by a majority of the governing bodies of the taxing units whose taxes the appraisal district collects and filed with the secretary of the appraisal district board of directors. The split-payment option may be revoked in the same manner as provided for adoption. <i>Tax Code 31.03</i> This payment option does not apply to taxes that are calculated too late for it to be available. <i>Tax Code 31.04(c)</i>
<i>In Certain Counties</i>	The board of a district located in a county having a population of not less than 285,000 and not more than 300,000 that borders a county having a population of 3.3 million or more and the Gulf of Mexico that has its taxes collected by another taxing unit that has adopted the split-payment option may provide, by official action, that the split-payment option does not apply to the district's taxes collected by the other taxing unit. <i>Tax Code 31.03(d)</i>
Installment Payments <i>Certain Homesteads</i>	An individual who is disabled or at least 65 years of age and qualified for a homestead exemption under Tax Code 11.13(c), or an individual who is a disabled veteran or the unmarried surviving spouse of a disabled veteran and qualified for an exemption under Tax Code 11.132 or 11.22, may pay district taxes imposed on the person's residence homestead property in four equal installments without penalty or interest if paid by the applicable dates set out in Tax Code 31.031. <i>Tax Code 31.031</i>
<i>Disaster or Emergency Area</i> Property Damaged — Automatic	A person may pay district taxes imposed on certain property the person owns in four equal installments without penalty or interest if paid in accordance with Tax Code 31.032. This provision applies to real and tangible personal property described in Tax Code 31.032(a) and taxes that are imposed on the property by a district before the first anniversary of the disaster or emergency. <i>Tax Code 31.032</i>

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Property Not Damaged — Board Option	The board may authorize a person to pay district taxes imposed on certain property that the person owns in installments. If the board adopts the installment-payment option under this provision, Tax Code 31.032(b), (b-1), (c), and (d) apply to the payment by a person of district taxes imposed on property that the person owns in the same manner as those subsections apply to the payment of taxes imposed on property to which Tax Code 31.032 applies. This provision applies to real and tangible personal property described in Tax Code 31.033(b) and taxes that are imposed on the property by a district before the first anniversary of the disaster or emergency. <i>Tax Code 31.033; 34 TAC 9.3061(b), (c)</i>
Definitions	“Disaster” has the meaning assigned by Government Code 418.004. “Emergency” means a state of emergency proclaimed by the governor under Government Code 433.001. <i>Tax Code 31.032(g), .033(a); 34 TAC 9.3061(a)</i>
Services in Lieu of Paying Taxes	The board by resolution may permit certain individuals or business entities to perform certain services for the district in lieu of paying the district property taxes. While performing services for a district, the individual is not an employee of the district and is not entitled to any benefit, including workers’ compensation coverage, that the district provides to its employees. <i>Tax Code 31.035, .036, .037</i>
Persons 65 and Over	Subject to the requirements of Tax Code 31.035, the board by order or resolution may permit an individual who is at least 65 years of age to perform service for the district in lieu of paying taxes imposed by a district on property owned by the individual and occupied as the individual’s residence homestead. Property owners performing services for a district under this provision may only supplement or complement the regular personnel of the district. A district may not reduce the number of persons the district employs or reduce the number of hours to be worked by employees of the district because the district permits property owners to perform services for the district under this provision. <i>Tax Code 31.035(a), (g)</i>
Teaching Services	An individual is qualified to perform teaching services for a district under the provisions below only if the individual holds a baccalaureate or more advanced degree in a field related to each course to be taught and: 1. Is certified as a classroom teacher under Education Code Chapter 21, Subchapter B; or

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2. Obtains a school district teaching permit under Education Code 21.055.

Tax Code 31.036(h), .037(i)

By Individual Subject to the requirements of Tax Code 31.036, the board by resolution may permit qualified individuals to perform teaching services for the district at a junior high school or high school of the district in lieu of paying taxes imposed by the district on property owned and occupied by the individual as a residence homestead.

Tax Code 31.036

By Employee of Business Entity Subject to the requirements of Tax Code 31.037, a board by resolution may authorize a corporation or other business entity to permit a qualified individual employed by the business entity to perform teaching services in a high school or a junior high school for the district in lieu of paying taxes imposed by the district on property owned by the business entity. *Tax Code 31.037*

Delinquent Taxes

Delinquency Date

Except as provided by Tax Code 31.02(b) (payment by certain eligible persons on active duty in the armed forces), 31.03 (split payments), and 31.04 (postponement of delinquency date based on mailing date of tax bills), taxes are due on receipt of the tax bill and are delinquent if not paid before February 1 of the year following the year in which imposed. *Tax Code 31.02*

Note: Delinquent taxes incur penalties and accrue interest in accordance with Tax Code 33.01, subject to any waiver by the board pursuant to Tax Code 33.011.

Delinquent Tax Collection

A board may contract with any competent attorney to represent the district to enforce the collection of delinquent taxes. The attorney's compensation is set in the contract, but the total amount of compensation provided may not exceed 20 percent of the amount of delinquent tax, penalty, and interest collected. *Tax Code 6.30(c)* [See CH(LEGAL) regarding contingent fee contracts for legal services and Government Code 2254.102(e) for additional requirements.]

Additional Penalties

The board may provide, by official action, that taxes that become delinquent at a certain time incur an additional penalty to defray costs of collection if the board has contracted with an attorney as provided above. *Tax Code 33.07, .08*

¹ Texas Comptroller Property Tax Exemptions website:
<https://comptroller.texas.gov/taxes/property-tax/exemptions/>

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**Tax Increment
Financing Act**

Board of Directors

Except as provided at Large Municipality below, each district that levies taxes on real property in a reinvestment zone designated by a county or municipality in accordance with the Tax Increment Financing Act, Tax Code Chapter 311, may appoint one member of the reinvestment zone board of directors if the district has approved the payment of all or part of the tax increment produced by the district into the tax increment fund for the zone. A district may waive its right to appoint a director. *Tax Code 311.009(a), (b)*

*Large
Municipality*

In a reinvestment zone designated by a municipality which is wholly or partially located in a county with a population of less than 1.8 million in which the principal municipality has a population of 1.1 million or more, each taxing unit that approves the payment of all or part of its tax increment into the tax increment fund is entitled to appoint a number of members to the board in proportion to the taxing unit's pro rata share of the total anticipated tax increment to be deposited into the tax increment fund during the term of the zone. *Tax Code 311.0091(a)–(c)*

Tax Increments
Amount

The amount of a district's tax increment for a year is the amount of property taxes levied and assessed by the district for that year on the captured appraised value of real property taxable by the district and located in a reinvestment zone or the amount of property taxes levied and collected by the district for that year on the captured appraised value of real property taxable by the district and located in a reinvestment zone. The board of the district shall determine which of the methods is used to calculate the amount of the district's tax increment.

"Captured
Appraised
Value"

The captured appraised value of real property taxable by a district for a year is the total taxable value of all real property taxable by the district and located in a reinvestment zone for that year less the tax increment base of the district.

"Tax Increment
Base"

The tax increment base of a district is the total taxable value of all real property taxable by the district and located in a reinvestment zone for the year in which the zone was designated under Tax Code Chapter 311.

Tax Code 311.012

*Collection and
Deposit*

Each district that taxes real property located in a reinvestment zone shall provide for the collection of its taxes in the zone as for any other property taxed by the district. Each district shall pay into the tax increment fund for the zone an amount equal to the tax increment produced by the district, less the sum of:

1. Property taxes produced from the tax increments that are, by contract executed before the designation of the area as a

reinvestment zone, required to be paid by the district to another political subdivision; and

2. A portion, not to exceed 15 percent, of the tax increment produced by the district as provided by the reinvestment zone financing plan or a larger portion as provided at Agreement Required below.

Tax Code 311.013(a)–(b)

Notwithstanding any termination of the reinvestment zone and unless otherwise specified by an agreement between the district and the municipality or county that created the zone, a district shall make the required payment not later than the 90th day after the later of the delinquency date for district property taxes or the date the municipality or county that created the zone submits to the district an invoice specifying the tax increment produced by the district and the amount the district is required to pay into the tax increment fund for the zone. A district is not required to pay into a tax increment fund the applicable portion of a tax increment attributable to delinquent taxes until those taxes are collected. *Tax Code 311.013(c), (i)*

A district whose taxable value is reduced under Government Code 403.302(d)(4) (determination of district property values by the comptroller) shall pay into the tax increment fund, in addition to the amount otherwise required to be paid, an amount equal to the amount by which the amount of taxes the district would have been required to pay into the fund in the current year if the district levied taxes at the rate the district levied in 2005 exceeds the amount the district is otherwise required to pay into the fund in the year of the reduction. This additional amount may not exceed the amount the district receives in state aid for the current tax year under Education Code 48.253 (additional state aid for tax increment financing payments). The district shall pay the additional amount after the district receives the state aid to which the district is entitled for the current tax year under Education Code 48.253. *Tax Code 311.013(n)*

*Agreement
Required*

A district is not required to pay into the tax increment fund any of its tax increment produced from property located in a reinvestment zone designated under Tax Code 311.005(a) or in an area added to a reinvestment zone under Tax Code 311.007 unless the district enters into an agreement to do so with the governing body of the municipality or county that designated the zone. *Tax Code 311.013(f)*

A district that participates in a zone is not required to increase the percentage or amount of the tax increment to be contributed by the

district because of an amendment to the project plan or reinvestment zone financing plan for the zone unless the board by official action approves the amendment. *Tax Code 311.011(g)*

A district is not required to pay into the tax increment fund any of its tax increment produced from property located in an area added to the reinvestment zone under Tax Code 311.007(a) or (b) unless the board enters into an agreement to do so with the governing body of the municipality or county that created the zone. *Tax Code 311.013(k)*

If the governing body of the municipality or county that designated a reinvestment zone extends the term of all or a portion of the zone, a district is not required to participate in the zone or portion of the zone for the extended term unless the district enters into a written agreement to do so. *Tax Code 311.007(c)*

Notwithstanding the designation of a later termination date under Tax Code 311.017(a), a district that taxes real property located in the reinvestment zone is not required to pay any of its tax increment into the tax increment fund for the zone after the termination date designated in the ordinance or order creating the zone unless the board enters into an agreement to do so with the governing body of the municipality or county that created the zone. *Tax Code 311.017(a-1)*

**Property
Redevelopment and
Tax Abatement Act**

On or after September 1, 2001, a school district may not enter into a tax abatement agreement under Tax Code Chapter 312. *Tax Code 312.002(f)*

**Reinvestment Zone
for Chapter 313**

Notwithstanding any other provision of Tax Code Chapter 312 to the contrary, the board, in the manner required for official action and for purposes of Tax Code Chapter 313, Subchapter B or C [see Texas Economic Development Act below], may designate an area entirely within the territory of the district as a reinvestment zone if the board finds that, as a result of the designation and the granting of a limitation on appraised value, for property located in the reinvestment zone, the designation is reasonably likely to:

1. Contribute to the expansion of primary employment in the reinvestment zone; or
2. Attract major investment in the reinvestment zone that would:
 - a. Be a benefit to property in the reinvestment zone and to the district; and
 - b. Contribute to the economic development of the region of this state in which the district is located.

The board may seek the recommendation of the commissioners court of each county and the governing body of each municipality that has territory in the district before designating an area as a reinvestment zone.

Tax Code 312.0025

**Texas Economic
Development Act**

Note: The Texas Economic Development Act, Tax Code Chapter 313, Subchapters B and C, expired on December 31, 2022. *Tax Code 313.007*

A limitation on appraised value approved before the expiration continues in effect according to the law as it existed immediately before its expiration, and the law is continued in effect for purposes of the limitation on appraised value. *Tax Code 313.171*

In implementing the Texas Economic Development Act, Tax Code Chapter 313, districts should strictly interpret the criteria and selection guidelines provided by Chapter 313 and approve only those applications for an ad valorem tax benefit that:

1. Enhance the local community;
2. Improve the local public education system;
3. Create high-paying jobs; and
4. Advance the economic development goals of Texas.

Tax Code 313.004(3)

Definitions

Agreement

“Agreement” means the written agreement between the board and the approved applicant on the form adopted by reference in 34 Administrative Code 9.1052 (Forms) to implement a limitation on the appraised value for district maintenance and operations ad valorem property tax purposes on an entity’s qualified property, required by Tax Code 313.027(d).

*Agreement
Holder*

“Agreement holder” means an entity that has executed an agreement with a district.

Applicant

“Applicant” means an entity that has applied for a limitation on appraised value for district maintenance and operations ad valorem property tax purposes on the entity’s property, as provided by Tax Code Chapter 313.

Application

“Application” means an application for limitation of appraised value for district maintenance and operations ad valorem property tax purposes on an entity’s qualified property on the form adopted by

reference in 34 Administrative Code 9.1052 (Forms), the schedules attached thereto, and the documentation submitted by an entity for the purpose of obtaining an agreement for a limitation on appraised value from a district.

*Application
Review Start
Date*

“Application review start date” means the later date of either the date on which the district issues its written notice that an applicant has submitted a completed application or the date on which the comptroller issues its written notice that an applicant has submitted a completed application.

*Completed
Application*

“Completed application” means an application in the form and number and containing all the information required pursuant to 34 Administrative Code 9.1053 (Entity Requesting Agreement to Limit Appraised Value), that has been determined by the district and the comptroller to include all minimum requirements for consideration.

Entity

“Entity” means any entity upon which a tax is imposed by Tax Code 171.001, including a combined group as defined by Tax Code 171.0001(7) or members of a combined group, provided, however, an entity does not include a sole proprietorship, partnership, or limited liability partnership.

34 TAC 9.1051(1), (2), (3), (7), (10), (12), (20)

*Qualified
Investment*

“Qualified investment” means:

1. Tangible personal property that is first placed in service in this state during the applicable qualifying time period that begins on or after January 1, 2002, without regard to whether the property is affixed to or incorporated into real property, and that is:
 - a. Described as Section 1245 property by Section 1245(a), Internal Revenue Code of 1986;
 - b. Used in connection with the manufacturing, processing, or fabrication in a cleanroom environment of a semiconductor product, without regard to whether the property is actually located in the cleanroom environment, including integrated systems, fixtures, and piping; all property necessary or adapted to reduce contamination or to control airflow, temperature, humidity, chemical purity, or other environmental conditions or manufacturing tolerances; and production equipment and machinery, moveable cleanroom partitions, and cleanroom lighting;
 - c. Used in connection with the operation of a nuclear electric power generation facility, including property, including pressure vessels, pumps, turbines, generators, and

- condensers, used to produce nuclear electric power; and property and systems necessary to control radioactive contamination;
- d. Used in connection with operating an integrated gasification combined cycle electric generation facility, including property used to produce electric power by means of a combined combustion turbine and steam turbine application using synthetic gas or another product produced by the gasification of coal or another carbon-based feedstock; or property used in handling materials to be used as feedstock for gasification or used in the gasification process to produce synthetic gas or another carbon-based feedstock for use in the production of electric power in the manner described herein;
 - e. Used in connection with operating an advanced clean energy project, as defined by Health and Safety Code 382.003; or
2. A building or a permanent, nonremovable component of a building that is built or constructed during the applicable qualifying time period that begins on or after January 1, 2002, and that houses tangible personal property described by items 1a–e above.

Tax Code 313.021(1)

*Qualified
Property*

“Qualified property” means:

- 1. Land:
 - a. That is located in an area designated as a reinvestment zone under Tax Code Chapter 311 or 312 or as an enterprise zone under Government Code Chapter 2303;
 - b. On which a person proposes to construct a new building or erect or affix a new improvement that does not exist before the date the person submits a complete application for a limitation on appraised value under Tax Code Chapter 313, Subchapter B;
 - c. That is not subject to a tax abatement agreement entered into by a district under Tax Code Chapter 312; and
 - d. On which, in connection with the new building or new improvement described by item 1b above, the owner or lessee of, or the holder of another possessory interest in, the land proposes to:

- (1) Make a qualified investment in an amount equal to at least the minimum amount required by Tax Code 313.023; and
 - (2) Create at least 25 new qualifying jobs, except as provided at Exception below;
2. The new building or other new improvement described by item 1b above; and
3. Tangible personal property:
 - a. That is not subject to a tax abatement agreement entered into by a district under Tax Code Chapter 312;
 - b. For which a sales and use tax refund is not claimed under Tax Code 151.3186; and
 - c. Except for new equipment described in Tax Code 151.318(q) or (q-1), that is first placed in service in the new building, in the newly expanded building, or in or on the new improvement described by item 1b above, or on the land on which that new building or new improvement is located, if the personal property is ancillary and necessary to the business conducted in that new building or in or on that new improvement.

Tax Code 313.021(2); see also 34 TAC 9.1051(16) (additional requirements for "Qualified Property")

Exception

For purposes of Tax Code Chapter 313, Subchapter C, applicable to certain rural districts, a property owner is required to create at least 10 qualifying jobs. *Tax Code 313.051(b)*

Qualifying Job

"Qualifying job" means a permanent full-time job that:

1. Requires at least 1,600 hours of work a year;
2. Is not transferred from one area in this state to another area in this state;
3. Is not created to replace a previous employee;
4. Is covered by a group health benefit plan for which the business offers to pay at least 80 percent of the premiums or other charges assessed for employee-only coverage under the plan, regardless of whether an employee may voluntarily waive the coverage; and
5. Pays at least 110 percent of the county average weekly wage for manufacturing jobs in the county where the job is located.

Tax Code 313.021(3); 34 TAC 9.1051(30)

To be eligible for a limitation on appraised value under Tax Code Chapter 313, the property owner must create the required number of new qualifying jobs and the average weekly wage for all jobs created that are not qualifying jobs must exceed the county average weekly wage for all jobs in the county where the jobs are located. *Tax Code 313.024(d)*

Waiver of New
Jobs Creation
Requirement

Notwithstanding any other provision of Tax Code Chapter 313 to the contrary, the board may waive the new jobs creation requirement and approve an application if the board makes a finding that the jobs creation requirement exceeds the industry standard for the number of employees reasonably necessary for the operation of the facility of the property owner that is described in the application. *Tax Code 313.025(f-1)*

*Qualifying Time
Period*

“Qualifying time period” means:

1. The period that begins on the date that a person’s application for a limitation on appraised value under Tax Code Chapter 313 is approved by the board and ends on December 31 of the second tax year that begins after that date, except as provided by items 2 and 3 below or Tax Code 313.027(h);
2. In connection with a nuclear electric power generation facility, the first seven tax years that begin on or after the third anniversary of the date the district approves the property owner’s application for a limitation on appraised value, unless a shorter time period is agreed to by the board and the property owner; or
3. In connection with an advanced clean energy project, the first five tax years that begin on or after the third anniversary of the date the district approves the property owner’s application for a limitation on appraised value, unless a shorter time period is agreed to by the board and the property owner.

Tax Code 313.021(4)

*Substantive
Document*

“Substantive document” means a document or other information or data in electronic media determined by the comptroller to substantially involve or include information or data significant to an application, the evaluation or consideration of an application, or the agreement or implementation of an agreement for limitation of appraised value pursuant to Tax Code Chapter 313. The term includes, but is not limited to, any application requesting a limitation on appraised value and any amendments or supplements, any economic impact evaluation made in connection with an application, any agreement between applicant and the district and any subsequent amend-

ments or assignments, any district written finding or report filed with the comptroller as required under 34 Administrative Code Chapter 9, Subchapter F; and any completed annual eligibility report (Form 50-772A) submitted to the comptroller. The term shall not include any employee names or other personal identifying information that is submitted to the comptroller. Positions can be described by job type, category, or general title. *34 TAC 9.1051(19)*

School District
Categories

For purposes of determining the required minimum amount of a qualified investment and the minimum amount of a limitation on appraised value, districts to which Tax Code Chapter 313, Subchapter B applies are categorized according to the taxable value of property in the district for the preceding tax year under Government Code Chapter 403, Subchapter M (comptroller's study of school district property values), as set out in Tax Code 313.022. *Tax Code 313.022(b); 34 TAC 9.1058(d)*

For purposes of determining the required minimum amount of a qualified investment and the minimum amount of a limitation on appraised value, districts to which Tax Code Chapter 313, Subchapter C applies are categorized according to the taxable value of industrial property in the district for the preceding tax year under Government Code Chapter 403, Subchapter M (comptroller's study of school district property values), as set out in Tax Code 313.052. *Tax Code 313.052; 34 TAC 9.1058(d)*

Minimum Amounts
of Qualified
Investment

For each category of district established by Tax Code 313.022, the minimum amount of a qualified investment is set out in Tax Code 313.023. *Tax Code 313.023*

For each category of district established by Tax Code 313.052, the minimum amount of a qualified investment is set out in Tax Code 313.053. *Tax Code 313.053*

Eligibility

Tax Code Chapter 313, Subchapters B and C apply only to property owned by an entity subject to franchise tax (Tax Code Chapter 171). To be eligible for a limitation on appraised value, the entity must use the property for a purpose stated in Tax Code 313.024.

*Exception for
Wind-Powered
Energy Device*

An owner of a parcel of land that is located wholly or partly in a reinvestment zone, a new building constructed on the parcel of land, a new improvement erected or affixed on the parcel of land, or tangible personal property placed in service in the building or improvement or on the parcel of land may not receive a limitation on appraised value for the parcel of land, building, improvement, or tangible personal property under an agreement under Tax Code Chapter 313, Subchapter B that is entered into on or after September 1, 2017, if, on or after that date, a wind-powered energy device is installed or constructed on the same parcel of land at a location

that is within 25 nautical miles of the boundaries of a military aviation facility located in this state. This prohibition applies regardless of whether the wind-powered energy device is installed or constructed at a location that is in the reinvestment zone.

Tax Code 313.024

Application for
Limitation on
Appraised Value

The owner or lessee of, or the holder of another possessory interest in, any qualified property may apply to the board for a limitation on the appraised value of the person's qualified property for district maintenance and operations ad valorem tax purposes. An application must be made on the form prescribed by the comptroller, must include the information required by the comptroller, and must be accompanied by:

1. The application fee established by the board;
2. Information sufficient to show that the real and personal property identified in the application as qualified property meets the applicable criteria established by Tax Code 313.021(2); and
3. Any information required by the comptroller for the purposes of Tax Code 313.026 (economic impact evaluation).

Tax Code 313.025(a)

*Required
Contents and
Format*

A completed application shall consist of, at a minimum, the items set forth in 34 Administrative Code 9.1053(a)(1) and shall be provided in the formats specified in 34 Administrative Code 9.1053(a)(2).

Optional
Requests

An applicant may include in an application:

1. A request that the district waive the applicable requirement to create new jobs. In order for a completed application to include a job waiver request, the applicant shall submit the information specified in 34 Administrative Code 9.1053(b)(1); or
2. A request to begin the qualifying time period on a date that is after the date that the application is approved. In order for a completed application to include a qualifying time period deferral request, the applicant shall submit the information specified in 34 Administrative Code 9.1053(b)(2).

34 TAC 9.1053(a), (b)

Changes

At the request of the district or the comptroller, or with the prior approval of the district and the comptroller, the applicant may submit an application amendment or application supplement at any time after the submission of the initial application. In order to be consid-

ered as part of the application, the application amendment or supplement shall:

1. Be submitted in the same form or schedule and manner as the information was initially submitted or should have been initially submitted;
2. Include a date for the submission and a sequential number identifying the number of submissions made by the applicant;
3. Have the signature of the authorized representative(s) by which the applicant confirms and attests to the truth and accuracy of the information submitted in the application amendment or supplement, as applicable, to the best knowledge and belief of the applicant and its representative(s); and
4. Be submitted before the 120th day after the application was accepted by the district or within another time period as provided in writing by the comptroller.

34 TAC 9.1053(c)

If a district receives an amended application or a supplemental application from an applicant after the district has prepared or sent written notice that the applicant has submitted a completed application, the district shall either:

1. Reject the amended application, supplemental application, or application, in whole or in part, and discontinue consideration of any submission by the applicant;
2. With the written concurrence of the comptroller, consider the completed application, as amended or supplemented, before the 151st day from the application review start date; or
3. Review the documents submitted by the applicant, issue an amended written notice of a completed application, and present the amended application to the board in the manner and time period authorized by 34 Administrative Code 9.1054(c)(5).

34 TAC 9.1054(e) [See Acting on Completed Application, below]

Confidential
Business
Information

Information provided to a district in connection with an application for a limitation on appraised value that describes the specific processes or business activities to be conducted or the specific tangible personal property to be located on real property covered by the application shall be segregated in the application from other information in the application and is confidential and not subject to public disclosure unless the board approves the application. Other information in the custody of a district or the comptroller in

connection with the application, including information related to the economic impact of a project or the essential elements of eligibility under Tax Code Chapter 313, such as the nature and amount of the projected investment, employment, wages, and benefits, may not be considered confidential business information if the board agrees to consider the application. Information in the custody of a district or the comptroller if the board approves the application is not confidential under this provision. *Tax Code 313.028; 34 TAC 9.1055(a)(1)–(4)*

At the time that the applicant submits its application, application amendment, or application supplement, the applicant may request that all or parts of such document not be posted on the internet and not otherwise be publicly released. In order to make such request, the applicant shall:

1. Submit a written request that:
 - a. Specifically lists each document or portion of document and each entry in any form prescribed by the comptroller that the applicant contends is confidential; and
 - b. Identifies specific detailed reasons stating why the applicant believes each item listed should be considered confidential and identifies any relevant legal authority in support of the request;
2. Segregate the documents which are subject to the request from the other documents submitted with the application, application amendment, or application supplement that are not subject to the request; and
3. Adequately designate the documents subject to the request as “confidential.”

34 TAC 9.1053(e)

Action on
Application

Initial Review

Within seven days of receipt of each document, the district shall submit to the comptroller a copy of the application and the proposed agreement between the applicant and the district. If the applicant submits an economic analysis of the proposed project, the district shall submit a copy of the analysis to the comptroller. In addition, the district shall submit to the comptroller any subsequent revision of or amendment to any of those documents within seven days of receipt. *Tax Code 313.025(a-1); 34 TAC 9.1054(b)*

*Acting on
Completed
Application*

If the board by official action elects to consider an application and determines that the application received is a completed application, the district shall:

1. Provide written notice to the applicant and to the comptroller, with a copy to the appraisal district, that the district has received and will be considering a completed application. The notice shall include:
 - a. The date on which the application was received;
 - b. The date on which the board elected to consider the application; and
 - c. The date on which the district determined that applicant has submitted a completed application;
2. At the time the district provides notice of a completed application, deliver to the comptroller:
 - a. A copy of the completed application including all material required by 34 Administrative Code 9.1053(a), and if applicable (b), (Entity Requesting Agreement to Limit Appraised Value); and
 - b. A request to the comptroller to provide an economic impact evaluation;
3. If the district maintains a generally accessible internet web site, provide a clear and conspicuous link on its web site to the internet web site maintained by the comptroller where substantive documents for the value limitation application for such district are posted;
4. On request of the comptroller, provide such written documents containing information requested by the comptroller as necessary for the consideration of a limitation on appraised value pursuant to Tax Code Chapter 313 within 20 days of the date of the request.

34 TAC 9.1054(c)(1)–(4)

*Economic Impact
Evaluation and
Certification*

The board is not required to consider an application for a limitation on appraised value. If the board elects to consider an application, the board shall deliver a copy of the application to the comptroller and request that the comptroller conduct an economic impact evaluation of the proposed investment. The comptroller shall conduct or contract with a third person to conduct the economic impact evaluation, which shall be completed and provided to the board, along with the comptroller's certificate or written explanation of the decision not to issue a certificate, as soon as practicable but not later than the 90th day after the date the comptroller receives the application. The board shall provide to the comptroller or to a third person contracted by the comptroller to conduct the economic im-

pact evaluation any requested information. The board shall provide a copy of the economic impact evaluation to the applicant on request. *Tax Code 313.025(b); 34 TAC 9.1055(d)*

Supplemental application information, amended application information, and additional information requested by the comptroller shall be promptly forwarded to the comptroller within 20 days of the date of the request. On request of the district or applicant, the comptroller may extend the deadline for providing additional information for a period of not more than ten working days. *34 TAC 9.1055(b)(1)(A)–(B)*

After receiving a copy of the application, the comptroller shall determine whether the property meets the requirements for eligibility for a limitation on appraised value. The comptroller shall notify the board of the comptroller's determination and provide the applicant an opportunity for a hearing before the determination becomes final. If the comptroller's determination becomes final, the comptroller is not required to provide an economic impact evaluation of the application or to submit a certificate for a limitation on appraised value of the property or a written explanation of the decision not to issue a certificate, and the board may not grant the application. *Tax Code 313.025(h), (i); 34 TAC 9.1055(b)(3), (c), (d), .1056*

*Effect on
Instructional
Facilities*

The comptroller shall promptly deliver a copy of the application to the Texas Education Agency (TEA). TEA shall determine the effect that the applicant's proposal will have on the number or size of the district's instructional facilities and submit a written report containing TEA's determination to the district. The board shall provide any requested information to TEA. Not later than the 45th day after the date TEA receives the application, TEA shall make the required determination and submit the written report to the board. *Tax Code 313.025(b-1)*

Fees

The board by official action shall establish reasonable nonrefundable application fees to be paid by property owners who apply to the district for a limitation on the appraised value of the person's property. The amount of an application fee must be reasonable and may not exceed the estimated cost to the district of processing and acting on an application, including any cost to the district associated with the required economic impact evaluation. *Tax Code 313.031(b); 34 TAC 9.1054(a)*

The total fee shall be paid at the time the application is submitted to the district. Any fees not accompanying the original application shall be considered supplemental payments. *34 TAC 9.1054(a)*

The comptroller may charge the applicant a fee sufficient to cover the costs of providing the economic impact evaluation. *Tax Code 313.025(b)*

*Supplemental
Payments*

A person and the district may not enter into an agreement under which the person agrees to provide supplemental payments to a district or any other entity on behalf of a district in an amount that exceeds an amount equal to the greater of \$100 per student per year in average daily attendance or \$50,000 per year, or for a period that exceeds the period beginning with the qualifying time period and ending December 31 of the third tax year after the date the person's eligibility for a limitation under Tax Code Chapter 313 expires. This limit does not apply to amounts described below at item 4 at Contents, Required and item 1 at Contents, Optional. *Tax Code 313.027(i)*

Approval

The board shall approve or disapprove an application not later than the 150th day after the date the application is filed, unless the economic impact evaluation has not been received or an extension is agreed to by the board and the applicant. *Tax Code 313.025(b)*

The board may extend the time period to approve a completed application required only if:

1. Either:
 - a. An economic impact analysis has not been submitted to the district by the comptroller; or
 - b. By agreement with the applicant; and
2. Notice of the extension is provided to the comptroller within seven days of the decision to provide the extension.

34 TAC 9.1054(d)

Before approving or disapproving an application that the board elects to consider, the board must make a written finding as to any criteria considered by the comptroller in conducting the economic impact evaluation under Tax Code 313.026. The board shall deliver a copy of those findings to the applicant.

The board may approve an application only if the board finds that the information in the application is true and correct, finds that the applicant is eligible for the limitation on the appraised value of the person's qualified property, and determines that granting the application is in the best interest of the district and this state.

The board may not approve an application unless the comptroller submits to the board a certificate for a limitation on appraised value of the property.

Tax Code 313.025(d-1), (e), (f)

When presented a completed application for which the comptroller has submitted a certificate for a limitation, the board shall either:

1. By majority vote adopt a written resolution approving the application which shall include:
 - a. Written findings:
 - (1) As to each criterion listed in 34 Administrative Code 9.1055(d)(3)(B)–(D) (Comptroller Application Review and Agreement to Limit Appraised Value);
 - (2) As to the criteria required by Tax Code 313.025(f-1) (waiver of new jobs creation requirement) if applicable;
 - (3) That the information in the application is true and correct; and
 - (4) That the applicant is eligible for the limitation on the appraised value of the entity's qualified property;
 - b. A determination that granting the application is in the best interest of the district and this state; and
 - c. Designate and direct a representative of the board to execute the agreement for property tax limitation presented by the approved applicant that complies with 34 Administrative Code Chapter 9, Subchapter F and Tax Code Chapter 313;
2. By majority vote disapprove the application; or
3. Take no official action and the application shall be considered disapproved on the 151st day after the application review start date.

34 TAC 9.1054(c)(5), (f)

In determining whether to approve an application, the board is entitled to request and receive assistance from the comptroller, the Texas Economic Development and Tourism Office, the Texas Workforce Investment Council, and the Texas Workforce Commission. The Texas Economic Development and Tourism Office or its successor may recommend that a district approve an application under Tax Code Chapter 313. In determining whether to approve

an application, the board shall consider any recommendation made by the Texas Economic Development and Tourism Office or its successor. *Tax Code 313.025(c), (g)*

Continued Eligibility

In order to obtain and continue to receive a limitation on appraised value pursuant to Tax Code Chapter 313, an applicant shall:

1. Have a completed application approved by the board in compliance with 34 Administrative Code 9.1054(f) (School District Application Review and Agreement to Limit Appraised Value);
2. At least 30 days prior to the meeting at which the board is scheduled to consider the application, provide to the district and the comptroller a Texas Economic Development Act Agreement, as specified in 34 Administrative Code 9.1052(a)(6) [now 9.1052(a)(4)], with terms acceptable to the applicant;
3. If the applicant includes a combined group or members of the combined group, have the agreement executed by the authorized representative of each member of the combined group that owns a direct interest in property subject to the proposed agreement by which such members are jointly and severally liable for the performance of the stipulations, provisions, terms, and conditions of the agreement;
4. Comply with all stipulations, provisions, terms, and conditions of the agreement for a limitation on appraised value executed with the district, 34 Administrative Code Chapter 9, Subchapter F, and Tax Code Chapter 313;
5. Be and remain in good standing under the laws of this state and maintain legal status as an entity;
6. Owe no delinquent taxes to the state;
7. Maintain eligibility for limitation on appraised value pursuant to Tax Code Chapter 313;
8. Provide to the district, the comptroller, and the appraisal district any change to information provided in the application, including but not limited to changes of the authorized representative(s); changes to the location and contact information for the approved applicant including all members of the combined group participating in the limitation agreement; and copies of any valid assignments of the agreement and contact information for authorized representative(s) of any assignees; and
9. Within 30 days after filing a completed application with the district, provide the comptroller with estimates of the gross tax

benefit resulting from the requested limitation on appraised value for school district maintenance and operations ad valorem tax and future revenues from the qualified property.

34 TAC 9.1053(f)

Agreement

No later than 20 business days after receiving an agreement for limitation on appraised value acceptable to an applicant, the comptroller:

1. Shall review the agreement for compliance with Tax Code Chapter 313 and the applicable rules (34 Administrative Code 9.1051–.1060), and consistency with the application submitted to the comptroller and as amended or supplemented;
2. May amend or withdraw the comptroller certificate for a limitation if the comptroller determines that the agreement as submitted by the applicant does not comply with Tax Code Chapter 313 or the applicable rules or that the agreement contains provisions that are not consistent with or represents information significantly different from that presented in the application as submitted to the comptroller; and
3. Provide written notification to the district of the actions taken.

34 TAC 9.1055(e)

The board and the property owner shall enter into a written agreement for the implementation of the limitation on appraised value on the owner's qualified property. *Tax Code 313.027(d); 34 TAC 9.1054(g), .1060*

*Limitation on
Appraised Value*

If the person's application is approved by the board, the appraised value for district maintenance and operations ad valorem tax purposes of the person's qualified property as described in the agreement between the person and the district may not exceed the lesser of:

1. The market value of the property; or
2. Subject to the minimum limitation amount below, the amount agreed to by the board.

Minimum
Limitation

The amount agreed to by the board must be an amount in accordance with Tax Code 313.027(b), according to the category to which the district belongs. [See School District Categories, above] A district, regardless of category, may agree to a greater amount.

Tax Code 313.027(a), (b), (c)

For a district to which Tax Code Chapter 313, Subchapter C applies, the amount agreed to by the board must be an amount in ac-

cordance with Tax Code 313.054, according to the category to which the district belongs. [See School District Categories, above]
A district, regardless of category, may agree to a greater amount.
Tax Code 313.054

Contents

Required

The agreement must:

1. Provide that the limitation applies for a period of ten years;
2. Specify the beginning date of the limitation, which must be January 1 of the first tax year that begins after the application date, the qualifying time period, or the date commercial operations begin at the site of the project;
3. Describe with specificity the qualified investment that the person will make on or in connection with the person's qualified property that is subject to the limitation; other property of the person that is not specifically described in the agreement is not subject to the limitation unless the board, by official action, provides that the other property is subject to the limitation;
4. Incorporate each relevant provision of Tax Code Chapter 313, Subchapter B, and, to the extent necessary, include provisions for the protection of future district revenues through the adjustment of the minimum valuations, the payment of revenue offsets, and other mechanisms agreed to by the property owner and the district;
5. Require the property owner to maintain a viable presence in the district for at least five years after the date the limitation on appraised value of the owner's property expires;
6. Provide for the termination of the agreement, the recapture of ad valorem tax revenue lost as a result of the agreement if the owner of the property fails to comply with the terms of the agreement, and payment of a penalty or interest, or both, on that recaptured ad valorem tax revenue;
7. Specify the ad valorem tax years covered by the agreement;
8. Be in a form approved by the comptroller; and
9. Disclose any consideration promised in conjunction with the application and the limitation.

Tax Code 313.027(a-1), (e), (f), (j)

Optional

The agreement may:

1. Provide that the property owner will protect the district in the event the district incurs extraordinary education-related expenses related to the project that are not directly funded in

state aid formulas, including expenses for the purchase of portable classrooms and the hiring of additional personnel to accommodate a temporary increase in student enrollment attributable to the project.

2. Specify any conditions the occurrence of which will require the district and the property owner to renegotiate all or any part of the agreement.
3. Provide for a deferral of the date on which the qualifying time period for the project is to commence or, subsequent to the date the agreement is entered into, be amended to provide for such a deferral. The agreement may not provide for the deferral of the date on which the qualifying time period is to commence to a date later than January 1 of the fourth tax year that begins after the date the application is approved except that if the agreement is one of a series of agreements related to the same project, the agreement may provide for the deferral of the date on which the qualifying time period is to commence to a date not later than January 1 of the sixth tax year that begins after the date the application is approved.

Tax Code 313.027(f), (h)

If an agreement for limitation on appraised value includes a provision in which the qualifying time period starts more than one year after the date that the application is approved, no earlier than 180 days and no later than 90 days prior to the start of the deferred qualifying time period:

1. The district shall provide the comptroller:
 - a. Copies of any documents or other information received from the applicant; and
 - b. After reviewing documents and information provided by the applicant, either:
 - (1) A written acknowledgment of receiving the application amendment or supplement; or
 - (2) A statement that no such amendment or supplement has been submitted; and
2. If the comptroller provides:
 - a. A comptroller certificate for a limitation with conditions different from the existing agreement, the board shall hold a meeting and determine whether to amend the agreement to include the conditions required by the comptroller or terminate the agreement; or

- b. A written explanation of the comptroller's decision not to re-issue a certificate, the district shall terminate the agreement.

34 TAC 9.1054(h), .1055(g)

Compliance and
Enforcement

The district shall provide to the comptroller any documents that reasonably appear to be substantive documents, and, within seven days of executing the agreement, a copy of the executed agreement and any attachments thereto. The district shall provide a copy of the executed agreement to the appraisal district.

The district shall comply with and enforce the stipulations, provisions, terms, and conditions of the agreement for limitation of the appraised value, 34 Administrative Code Chapter 9, Subchapter F, and Tax Code Chapter 313. To determine and obtain compliance with each agreement, for each calendar year during the term of the agreement the district shall require the approved applicant to submit:

1. Either the information necessary to complete the annual eligibility report, or a completed annual eligibility report;
2. A completed job creation compliance report (Form 50-825); and
3. Any information required by the state auditor office or its designee.

34 TAC 9.1054(i)

Disclosure of
Appraised Value
Limitation
Information

If a district maintains a generally accessible internet website, the district shall maintain a link on its internet website to the area of the comptroller's internet website where information on each of the district's agreements to limit appraised value is maintained. *Tax Code 313.0265(c)*

Accessibility of
Documents

Any documents submitted in an electronic format (including searchable pdfs) to the comptroller must comply with the accessibility standards and specifications described in 1 Administrative Code Chapters 206 and 213. *34 TAC 9.1055(a)(5)*

**Capitalization
Threshold**

The capitalization threshold for purposes of classifying individual capital assets shall be \$5,000.

The Superintendent shall determine the capitalization threshold for a group of assets, the individual cost of which does not exceed the capitalization threshold above but for which the cost in the aggregate is significant.

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Note: For legal requirements applicable to purchases with federal funds, see CBB.

For required vendor disclosures and contract provisions, including prohibitions, see CHE.

For provisions pertaining to criminal history record information on contractors, see CJA.

For legal requirements related to energy savings performance contracts, see CL.

For information on procuring school buses, see CNB.

For legal requirements applicable to school nutrition procurement, including produce, with federal funds, see COA.

For information regarding construction of school facilities, see CV series.

Board Authority

The board may adopt rules and procedures for the acquisition of goods and services. *Education Code 44.031(d)*

Delegation of
Authority

The board may, as appropriate, delegate its authority regarding an action authorized or required by Education Code Chapter 44, Subchapter B, to be taken by a district to a designated person, representative, or committee.

The board may not delegate the authority to act regarding an action authorized or required to be taken by the board by Education Code Chapter 44, Subchapter B.

*Disaster
Delegation*

Notwithstanding any other provision of the Education Code, in the event of a catastrophe, emergency, or natural disaster affecting a district, the board may delegate to the superintendent or designated person the authority to contract for the replacement, construction, or repair of school equipment or facilities under Education Code Chapter 44, Subchapter B if emergency replacement, construction, or repair is necessary for the health and safety of district students and staff.

Education Code 44.0312

**Purchases Valued at
or Above \$50,000**

Methods

Except as provided by Education Code Chapter 44, Subchapter B, all district contracts for the purchase of goods and services, except contracts for the purchase of produce or vehicle fuel, valued at \$50,000 or more in the aggregate for each 12-month period, shall be made by the method, of the following methods, that provides the best value for a district:

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1. Competitive bidding for services other than construction services.
2. Competitive sealed proposals for services other than construction services.
3. A request for proposals for services other than construction services.
4. An interlocal contract.
5. A method provided by Government Code Chapter 2269 for construction services [see CV series];
6. The reverse auction procedure as defined by Government Code 2155.062(d).
7. The formation of a political subdivision corporation under Local Government Code 304.001 (purchase of electricity).

Education Code 44.031(a)

Exceptions

Emergency
Damage or
Destruction

If school equipment, a school facility, or a part of a school facility or personal property is destroyed or severely damaged or, as a result of an unforeseen catastrophe or emergency, undergoes major operational or structural failure, and the board determines that the delay posed by the methods provided for in Education Code 44.031 would prevent or substantially impair the conduct of classes or other essential school activities, then contracts for the replacement or repair of the equipment, school facility, or the part of the school facility may be made by methods other than those required by Education Code 44.031. *Education Code 44.031(h)*

Sole Source

Without complying with Education Code 44.031(a) above, a district may purchase an item that is available from only one source, including:

1. An item for which competition is precluded because of the existence of a patent, copyright, secret process, or monopoly.
2. A film, manuscript, or book.
3. A utility service, including electricity, gas, or water.
4. A captive replacement part or component for equipment.

The exceptions above do not apply to mainframe data-processing equipment and peripheral attachments with a single-item purchase price in excess of \$15,000.

Education Code 44.031(j)–(k)

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*Competitive
Bidding*

Except to the extent prohibited by other law and to the extent consistent with Education Code Chapter 44, Subchapter B, a district may use competitive bidding to select a vendor as authorized by Education Code 44.031(a)(1).

A district shall award a competitively bid contract at the bid amount to the bidder offering the best value for the district. In determining the best value for the district, the district is not restricted to considering price alone but may consider any other factors stated in the selection criteria. The selection criteria may include the factors listed in Education Code 44.031(b) [see Contract Selection Factors, below].

Except as provided below, Local Government Code Chapter 271, Subchapter B (Competitive Bidding on Certain Public Works Contracts) does not apply to a competitive bidding process under this policy.

Local Government Code Sections 271.026 (Opening of Bids), 271.027(a) (Award of Contract), and 271.0275 (Safety Record of Bidder Considered) apply to a competitive bidding process under Education Code Chapter 44, Subchapter B. [See CVA for these requirements.]

Education Code 44.0351

[For information on additional competitive procedures under the Public Property Finance Act, see CHH.]

*Competitive
Sealed Proposals*

In selecting a vendor through competitive sealed proposals as authorized by Education Code 44.031(a)(2), a district shall follow the procedures prescribed below.

Request for
Proposals

The district shall prepare a request for competitive sealed proposals that includes information that vendors may require to respond to the request. The district shall state in the request for proposals the selection criteria that will be used in selecting the successful offeror.

Opening
Proposals

The district shall receive, publicly open, and read aloud the names of the offerors and, if any are required to be stated, all prices stated in each proposal. Not later than the 45th day after the date on which the proposals are opened, the district shall evaluate and rank each proposal submitted in relation to the published selection criteria.

Selection

The district shall select the offeror that offers the best value for the district based on the published selection criteria and on its ranking evaluation. The district shall first attempt to negotiate a contract with the selected offeror. The district may discuss with the selected

offeror options for a scope or time modification and any price change associated with the modification. If the district is unable to negotiate a satisfactory contract with the selected offeror, the district shall, formally and in writing, end negotiations with that offeror and proceed to the next offeror in the order of the selection ranking until a contract is reached or all proposals are rejected.

In determining the best value for the district, the district is not restricted to considering price alone but may consider any other factors stated in the selection criteria.

Education Code 44.0352

*Interlocal
Contracts*

“Interlocal contract” means a contract or agreement made under Government Code Chapter 791 (Interlocal Cooperation Act). A district may contract or agree with another local government or a federally recognized Indian tribe, as listed by the U.S. secretary of the interior under 25 U.S.C. 479a-1, whose reservation is located within the boundaries of this state to perform governmental functions and services in accordance with Government Code Chapter 791. A district may agree with another local government and with the state or a state agency, including the comptroller, to purchase goods and services. *Gov’t Code 791.003(2), .011(a), .025(a)*

An interlocal contract must:

1. Be authorized by the governing body of each party to the contract;
2. State the purpose, terms, rights, and duties of the contracting parties; and
3. Specify that each party paying for the performance of governmental functions or services must make those payments from current revenues available to the paying party.

An interlocal contractual payment must be in an amount that fairly compensates the performing party for the services or functions performed under the contract. An interlocal contract may be renewed. Notwithstanding item 2 above, an interlocal contract may have a specified term of years.

Gov’t Code 791.011(d)–(f), (i)

A district may agree with another local government, including a nonprofit corporation that is created and operated to provide one or more governmental functions and services, or with the state or a state agency, including the comptroller, to purchase goods and any services reasonably required for the installation, operation, or maintenance of the goods. This provision does not apply to ser-

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vices provided by firefighters, police officers, or emergency medical personnel. *Gov't Code 791.025(b)*

A district that purchases goods and services under Government Code 791.025 satisfies the requirement to seek competitive bids for the purchase of the goods and services. *Gov't Code 791.025(c); Atty. Gen. Op. JC-37 (1999)*

Reverse Auction

A district that uses the reverse auction procedure must include in the procedure a notice provision and other provisions necessary to produce a method of purchasing that is advantageous to the district and fair to vendors. *Local Gov't Code 271.906(b)*

"Reverse auction procedure" means:

1. A real-time bidding process usually lasting less than one hour and taking place at a previously scheduled time and internet location, in which multiple suppliers, anonymous to each other, submit bids to provide the designated goods or services; or
2. A bidding process usually lasting less than two weeks and taking place during a previously scheduled period and at a previously scheduled internet location, in which multiple suppliers, anonymous to each other, submit bids to provide the designated goods or services.

Gov't Code 2155.062(d)

Site-Based
Purchasing

If a purchase is made at the campus level in a district with a student enrollment of 180,000 or more that has formally adopted a site-based decision-making plan under Education Code Subchapter F, Chapter 11 [see BQ series], that delegates purchasing decisions to the campus level, Education Code 44.031 applies only to the campus and does not require the district to aggregate and jointly award purchasing contracts. A district that adopts site-based purchasing under this provision shall adopt a policy to ensure that campus purchases achieve the best value to the district and are not intended or used to avoid the requirement that a district aggregate purchases under Education Code 44.031(a). *Education Code 44.031(m)*

**Contract Selection
Factors**

Except as provided by Education Code Chapter 44, Subchapter B, in determining to whom to award a contract, the district shall consider:

1. The purchase price.
2. The reputation of the vendor and of the vendor's goods or services.

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3. The quality of the vendor's goods or services.
4. The extent to which the goods or services meet the district's needs.
5. The vendor's past relationship with the district.
6. The impact on the ability of the district to comply with laws and rules relating to historically underutilized businesses.
7. The total long-term cost to the district to acquire the vendor's goods or services.
8. For a contract for goods and services, other than goods and services related to telecommunications and information services, building construction and maintenance, or instructional materials, whether the vendor or the vendor's ultimate parent company or majority owner has its principal place of business in this state or employs at least 500 persons in this state.
9. Any other relevant factor specifically listed in the request for bids or proposals.

Education Code 44.031(b)

In awarding a contract by competitive sealed bid under Education Code 44.031, a district that has its central administrative office located in a municipality with a population of less than 250,000 may consider a bidder's principal place of business in the manner provided by Local Government Code 271.9051. This provision does not apply to the purchase of telecommunications services or information services, as those terms are defined by 47 U.S.C. Section 153. *Education Code 44.031(b-1)*

The factors listed above are the only criteria that may be considered by a district in its decision to award a contract. *R.G.V. Vending v. Weslaco Indep. Sch. Dist.*, 995 S.W.2d 897 (Tex. App.—Corpus Christi 1999, no pet.)

Preferences
*Agricultural
Products*

A district that purchases agricultural products shall give preference to those produced, processed, or grown in Texas if the cost to the district is equal and the quality is equal. If agricultural products produced, processed, or grown in Texas are not equal in cost and quality to other products, the district shall give preference to agricultural products produced, processed, or grown in other states of the United States, if the cost and quality of the U.S. and foreign products are equal.

"Agricultural products" includes textiles and other similar products.

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“Processed” means canning, freezing, drying, juicing, preserving, or any other act that changes the form of a good from its natural state to another form.

A district may not adopt product purchasing specifications that unnecessarily exclude agricultural products produced, processed, or grown in Texas.

Vegetation for
Landscaping

A district that purchases vegetation for landscaping purposes, including plants, shall give preference to Texas vegetation if the cost to the district is equal and the quality is equal.

Education Code 44.042

[For legal requirements applicable to school nutrition procurement, including produce and agricultural products, with federal funds, see COA.]

*Recycled
Products*

A district shall give preference in purchasing to products made of recycled materials if the products meet applicable specifications as to quantity and quality and the average price of the product is not more than ten percent greater than the price of comparable nonrecycled products. Preferences will be applied in accordance with state procurement statutes and rules. *30 TAC 328.203*

Subchapter K of 30 Administrative Code (Governmental Entity Recycling and Purchasing of Recycled Materials) does not apply to a district with a student enrollment of less than 10,000 students. *30 TAC 328.204(a)*

A district regularly shall review and revise its procurement procedures and specifications for the purchase of goods, supplies, equipment, and materials in order to:

1. Eliminate procedures and specifications that explicitly discriminate against products made of recycled materials;
2. Encourage the use of products made of recycled materials; and
3. Ensure to the maximum extent economically feasible that the district purchases products that may be recycled when they have served their intended use.

In developing new procedures and specifications, the district shall encourage the use of recycled products and products that may be recycled or reused.

Health and Safety Code 361.426(b)–(c)

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*Bidder's Place of
Business*

In awarding a contract by competitive sealed bid under Education Code 44.031, a district that has its central administrative office located in a municipality with a population of less than 250,000 may consider a bidder's principal place of business in the manner provided by Local Government Code Section 271.9051. This provision does not apply to the purchase of telecommunications services or information services, as those terms are defined by 47 U.S.C. 153. *Education Code 44.031(b-1)*

Notice Publication

Notice of the time by when and place where the bids or proposals, or the responses to a request for qualifications, will be received and opened shall be published in the county in which the district's central administrative office is located, once a week for at least two weeks before the deadline for receiving bids, proposals, or responses to a request for qualifications. If there is not a newspaper in that county, the advertising shall be published in a newspaper in the county nearest the county seat of the county in which a district's central administrative office is located. In a two-step procurement process, the time and place where the second-step bids, proposals, or responses will be received are not required to be published separately. *Education Code 44.031(g)*

**Electronic Bids or
Proposals**

A district may receive bids or proposals under Education Code Chapter 44 through electronic transmission if the board adopts rules to ensure the identification, security, and confidentiality of electronic bids or proposals and to ensure that the electronic bids or proposals remain effectively unopened until the proper time.

Notwithstanding any other provision of Education Code Chapter 44, an electronic bid or proposal is not required to be sealed. A provision of Education Code Chapter 44 that applies to a sealed bid or proposal applies to a bid or proposal received through electronic transmission in accordance with the rules adopted by the board.

Education Code 44.0313

Right to Work

While a district is engaged in procuring goods and services or awarding a contract, or overseeing procurement or construction for a public work or public improvement, a district:

1. May not consider whether a vendor is a member of or has another relationship with any organization; and
2. Shall ensure that its bid specifications and any subsequent contract or other agreement do not deny or diminish the right of a person to work because of the person's membership or other relationship status with respect to any organization.

Education Code 44.043

**Contract with Person
Indebted to District**

The board by resolution may establish regulations permitting the district to refuse to enter into a contract or other transaction with a person indebted to the district. It is not a violation of Education Code Chapter 44, Subchapter B (Purchases; Contracts) for a district, under regulations adopted under this provision, to refuse to award a contract to or enter into a transaction with an apparent low bidder or successful proposer that is indebted to the district.

“Person” includes an individual, sole proprietorship, corporation, nonprofit corporation, partnership, joint venture, limited liability company, and any other entity that proposes or otherwise seeks to enter into a contract or other transaction with the district requiring approval by the board.

Education Code 44.044

Out-of-State Bidders

A district may not award a governmental contract to a nonresident bidder unless the nonresident underbids the lowest bid submitted by a responsible resident bidder by an amount that is not less than the greater of the amount by which a resident bidder would be required to underbid the nonresident bidder to obtain a comparable contract in the state in which the nonresident’s principal place of business is located, or the state in which a majority of the manufacturing relating to the contract will be performed. *Gov’t Code 2252.002*

This requirement does not apply to a contract involving federal funds. A district shall use the information published by the comptroller under Government Code 2252.003 (Publication of Other State’s Laws on Contracts) to evaluate the bid of a nonresident bidder. A district may rely on information published under Government Code 2252.003 to meet the requirements of Government Code 2252.002. *Gov’t Code 2252.003–.004*

“Governmental contract” means a contract awarded by a governmental entity, including a public school district, for general construction, an improvement, a service, or a public works project or for a purchase of supplies, materials, or equipment.

“Resident bidder” refers to a person whose principal place of business is in this state, including a contractor whose ultimate parent company or majority owner has its principal place of business in this state.

Gov’t Code 2252.001

**Professional
Services**

Education Code 44.031 does not apply to a contract for professional services rendered, including the services of an architect, attorney, certified public accountant, engineer, or fiscal agent. A district may, at its option, contract for professional services rendered

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by a financial consultant or a technology consultant in the manner provided by Government Code 2254.003 (Professional Services Procurement Act) (see below), in lieu of the methods provided by Education Code 44.031. *Education Code 44.031(f)*

Professional
Services
Procurement Act

Selection

A district may not select a provider of professional services or a group or association of providers or award a contract for the services on the basis of competitive bids submitted for the contract or for the services, but shall make the selection and award on the basis of demonstrated competence and qualifications to perform the services and for a fair and reasonable price. *Gov't Code 2254.003(a)*

Definition

"Professional services" means services:

1. Within the scope of the practice, as defined by state law, of accounting, architecture, landscape architecture, land surveying, medicine, optometry, professional engineering, real estate appraising, professional nursing, or forensic science;
2. Provided in connection with the professional employment or practice of a person who is licensed or registered as a certified public accountant, architect, landscape architect, land surveyor, physician, optometrist, professional engineer, state-certified or state-licensed real estate appraiser, registered nurse, or a forensic analyst or forensic science expert; or
3. Provided by a person lawfully engaged in interior design, regardless of whether the person is registered as an interior designer under Occupations Code Chapter 1053.

Gov't Code 2254.002

[For specific information on procuring architectural or engineering services, see CV. For information on procuring services of physicians, optometrists, and registered nurses under certain circumstances, see Government Code 2254.008.]

Contingent Fee
Contract for Legal
Services

"Contingent fee contract" means a contract for legal services under which the amount or the payment of the fee for the services is contingent in whole or in part on the outcome of the matter for which the services were obtained. The term includes an amendment to a contract for legal services described by this provision if the amendment changes the scope of representation or may result in the filing of an action or the amending of a petition in an existing action. *Gov't Code 2254.101(2)*

Government Code Chapter 2254, Subchapter C provides the manner in which and the situations under which a district may compen-

sate a public contractor under a contingent fee for legal services. That subchapter does not apply to a contract for legal services:

1. Provided to a district under Government Code Chapter 403, Subchapter M; or
2. Entered into by a district for the collection of an obligation, as defined by Government Code 2107.001, that is delinquent [see CCGA(LEGAL) regarding delinquent tax collection] or for services under Government Code 1201.027 [see CCA(LEGAL) regarding issuance of public securities], except that Government Code sections 2254.1032, 2254.1034, 2254.1036, and 2254.1037 do apply to the contract.

Gov't Code 2254.102

A district may select an attorney or law firm to award a contingent fee contract only in accordance with Government Code 2254.003(a) (Professional Services Procurement Act) [see Selection, above] and Government Code 2254.1032.

In procuring legal services under a contingent fee contract, a district shall:

1. Select a well-qualified attorney or law firm on the basis of demonstrated competence, qualifications, and experience in the requested services; and
2. Attempt to negotiate a contract with that attorney or law firm for a fair and reasonable price.

Gov't Code 2254.1032

Specific Purchases

Computers

A district may acquire computers and computer-related equipment, including computer software, through the Department of Information Resources (DIR) under contracts entered into in accordance with Government Code Chapter 2054 or 2157. *Education Code 44.031(i)*

Automated
Information System

A district may purchase an automated information system using the purchasing method described by Government Code 2157.068 for commodity items or a purchasing method designated by the comptroller to obtain the best value for the state, including a request for offers method. A district that purchases an item using a method described above satisfies any state law requiring the district to seek competitive bids for the purchase of the item. *Gov't Code 2157.006; 34 TAC 20.222* [See 1 Administrative Code Chapter 212 for rules related to purchases of commodity items.]

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Automated External Defibrillators	A district that purchases or leases an automated external defibrillator (AED), as defined by Health and Safety Code 779.001, shall ensure that the AED meets standards established by the federal Food and Drug Administration. <i>Education Code 44.047(a)</i>
Insurance	A contract for the purchase of insurance is not a contract for professional services. A district must award such a contract using one of the methods in Education Code 44.031. <i>Atty. Gen. Op. DM-418 (1996)</i>
<i>Multiyear Contracts</i>	A district may execute an insurance contract for a period longer than 12 months, if the contract complies with Local Government Code 271.903(a) [see Commitment of Current Revenue, below]. If a district executes a multiyear insurance contract, it need not advertise for insurance vendors until the 12-month period during which the district will be executing a new insurance contract. <i>Atty. Gen. Op. DM-418 (1996)</i>
Other Purchasing Methods	The comptroller shall establish a program by which the comptroller performs purchasing services for local governments. The services must include:
State Purchasing Program	1. The extension of state contract prices to participating local governments when the comptroller considers it feasible. 2. Solicitation of bids on items desired by local governments if the solicitation is considered feasible by the comptroller and is desired by the local government. 3. Provision of information and technical assistance to local governments about the purchasing program. The comptroller may charge a participating local government an amount not to exceed the actual costs incurred by the comptroller in providing purchasing services to the local government under the program. <i>Local Gov't Code 271.082</i>
<i>District Participation</i>	A district may participate in the purchasing program, including participation in purchases that use the reverse auction procedure, by filing with the comptroller a resolution adopted by the board requesting that the district be allowed to participate on a voluntary basis, and to the extent the comptroller deems feasible, and stating that the district will:
	1. Designate an official to act for the district in all matters relating to the program, including the purchase of items from the vendor under any contract, and that the board will direct the decisions of the representative;

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2. Be responsible for:
 - a. Submitting requisitions to the comptroller under any contract; or
 - b. Electronically sending purchase orders directly to vendors, or complying with procedures governing a reverse auction purchase, and electronically sending to the comptroller reports on actual purchases made under this provision that provide the information and are sent at the times required by the comptroller;
3. Be responsible for making payment directly to the vendor;
4. Be responsible for the vendor's compliance with all conditions of delivery and quality of the purchased item.

A district that purchases an item under a state contract or under a reverse auction procedure, sponsored by the comptroller satisfies any state law requiring the district to seek competitive bids for the purchase of the item.

Local Gov't Code 271.083

Multiple Award
Contract Schedule

The comptroller shall develop a schedule of multiple award contracts that have been previously awarded using a competitive process by the federal government or any other governmental entity in any state. *Gov't Code 2155.502(a)*

A district may purchase goods or services directly from a vendor under a contract listed on a schedule developed under Government Code Chapter 2155, Subchapter I. A district contracting for the purchase of an automated information system under a contract listed on a schedule shall comply with Government Code 2157.068(e-1) (Purchase of Information Technology Commodity Items) [see Automated Information System, above]. A purchase authorized by this provision satisfies any requirement of state law relating to competitive bids or proposals.

The price listed for a good or service under a multiple award contract is a maximum price. A district may negotiate a lower price for goods or services under a contract listed on a schedule developed under Government Code Chapter 2155, Subchapter I.

Gov't Code 2155.504

Cooperative
Purchasing
Program

A district may participate in a cooperative purchasing program with another local government of this state or another state or with a local cooperative organization of this state or another state. A district that is participating in a cooperative purchasing program may sign

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an agreement with another participating local government or a local cooperative organization stating that the district will:

1. Designate a person to act under the direction of, or on behalf of, the district in all matters relating to the program;
2. Make payments to another participating local government or local cooperative organization or directly to a vendor under a contract made under these provisions, as provided in the agreement between the participating local governments or between a local government and a local cooperative organization; and
3. Be responsible for the vendor's compliance relating to the quality of items and terms of delivery, to the extent provided in the agreement between the participating local governments or between a local government and a local cooperative organization.

A district that purchases goods or services under these provisions satisfies any state law requiring the district to seek competitive bids for the purchase of the goods or services.

Local Gov't Code 271.102; Atty. Gen. Op. JC-37 (1999)

*Cooperative
Purchasing
Contract Fees*

A district that enters into a purchasing contract valued at \$25,000 or more under Education Code 44.031(a)(5) (interlocal contract), under Local Government Code Chapter 271, Subchapter F (cooperative purchasing program), or under any other cooperative purchasing program authorized for school districts by law shall document a contract-related fee, including a management fee, paid by or to the district and the purpose of each fee under the contract.

The amount, purpose, and disposition of any fee described above must be presented in a written report and submitted annually in an open meeting of the board. The written report must appear as an agenda item. The commissioner of education may audit the written report.

Education Code 44.0331

**Commitment of
Current Revenue**

If a contract for the acquisition, including lease, of real or personal property retains to the board the continuing right to terminate at the expiration of each budget period during the term of the contract, is conditioned on a best efforts attempt by the board to obtain and appropriate funds for payment of the contract, or contains both the continuing right to terminate and the best efforts conditions, the contract is a commitment of a district's current revenue only. *Local Gov't Code 271.903*

PURCHASING AND ACQUISITION

CH
(LEGAL)

Change Orders

For provisions regarding change orders, see CV.

Criminal Offenses

An officer, employee, or agent of a district commits an offense if the person with criminal negligence makes or authorizes separate, sequential, or component purchases to avoid the requirements of Education Code 44.031(a) or (b). An offense under this provision is a Class B misdemeanor and is an offense involving moral turpitude.

“Component purchases” means purchases of the component parts of an item that in normal purchasing practices would be made in one purchase. “Separate purchases” means purchases, made separately, of items that in normal purchasing practices would be made in one purchase. “Sequential purchases” means purchases, made over a period, of items that in normal purchasing practices would be made in one purchase.

Education Code 44.032(a)–(b)

An officer, employee, or agent of a district commits an offense if the person with criminal negligence violates Education Code 44.031(a) or (b) other than by conduct described by Education Code 44.032(b). An offense under this provision is a Class B misdemeanor and is an offense involving moral turpitude. *Education Code 44.032(c)*

An officer or employee of a district commits an offense if the officer or employee knowingly violates Education Code 44.031, other than by conduct described by Education Code 44.032(b) or (c). An offense under this provision is a Class C misdemeanor. *Education Code 44.032(d)*

Removal from
Office

The final conviction of a person other than a trustee of a district for an offense under Education Code 44.032(b) or (c) above results in the immediate removal from office or employment of that person. A trustee who is convicted of an offense under Education Code 44.032 is considered to have committed official misconduct for purposes of Local Government Code Chapter 87, and is subject to removal as provided by that chapter and Texas Constitution Article V, Section 24. For four years after the date of the final conviction, the removed person is ineligible to be a candidate for or to be appointed or elected to a public office in Texas, is ineligible to be employed by or act as an agent for the state or a political subdivision of the state, and is ineligible to receive any compensation through a contract with the state or a political subdivision of the state. *Education Code 44.032(e)*

Injunction

A court may enjoin performance of a contract made in violation of Education Code Chapter 44, Subchapter B. A county attorney, dis-

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trict attorney, criminal district attorney, citizen of the county in which the district is located, or any interested party may bring an action for an injunction. A party who prevails in an action brought under this provision is entitled to reasonable attorney's fees as approved by the court. *Education Code 44.032(f)*

SECURITY PERSONNEL
COMMISSIONED PEACE OFFICERS

CKEA
(LOCAL)

District Police Department	To ensure sufficient security and protection of students, staff, and property, the Board authorizes the formation of a District police department and shall employ and commission police officers.
Supervisory Authority	The chief of police shall be accountable to and shall report to the Superintendent. In accordance with law, the Superintendent shall not delegate this supervisory responsibility.
Jurisdiction	The jurisdiction of police officers shall include all territory within District boundaries, as well as all real and personal property outside the boundaries of the District that is owned, leased, or rented by the District, or is otherwise under the District's control.
Police Authority	Police officers employed by the District shall have all the powers, privileges, and immunities of police officers on or off duty within the jurisdiction of the District. Subject to limitations in law, District police officers shall have the authority to: 1. Protect the safety and welfare of any person in the jurisdiction of the District and protect the property of the District. 2. Enforce all laws, including municipal ordinances, county ordinances, and state laws, and investigate violations of law as needed. In doing so, District police officers may serve search warrants in connection with District-related investigations in compliance with the Texas Code of Criminal Procedure. 3. Arrest suspects consistent with state and federal statutory and constitutional standards governing arrests, including arrests without warrant, for offenses that occur in the officer's presence or under the other rules set out in the Texas Code of Criminal Procedure. 4. Coordinate and cooperate with commissioned officers of all other law enforcement agencies in the enforcement of this policy as necessary. 5. Enforce District policies, rules, and regulations on District property, in school zones, at bus stops, or at District functions. 6. Investigate violations of District policy, rules, and regulations as requested by the Superintendent and participate in hearings concerning alleged violations. 7. Carry weapons as directed by the chief of police and approved by the Superintendent. 8. Carry out all other duties as directed by the chief of police or Superintendent.

SECURITY PERSONNEL
COMMISSIONED PEACE OFFICERS

CKEA
(LOCAL)

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

SECURITY PERSONNEL
COMMISSIONED PEACE OFFICERS

CKEA
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*High-Speed
Pursuit*

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

Complaints

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

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

Reduction of Energy Consumption

The board shall establish a long-range energy plan to reduce the district's annual electric consumption by five percent beginning with the 2008 state fiscal year and consume electricity in subsequent fiscal years in accordance with the district's energy plan. The plan must include:

1. Strategies for achieving energy efficiency that:
 - a. Result in net savings for the district; or
 - b. Can be achieved without financial cost to the district; and
2. For each strategy identified above, the initial, short-term capital costs and lifetime costs and savings that may result from implementation of the strategy.

A strategy for achieving energy efficiency includes facility design and construction.

In determining whether a strategy may result in financial cost to the district, the board shall consider the total net costs and savings that may occur over the seven-year period following implementation of the strategy.

The board may submit the plan to the State Energy Conservation Office for the purposes of determining whether funds available through loan programs administered by the office or tax incentives administered by the state or federal government are available to the district. The board may not disallow any proper allocation of incentives.

Education Code 44.902

Energy Savings Performance Contracts

"Energy savings performance contract" has the meaning assigned by Local Government Code 302.001.

Each energy or water conservation measure must comply with current local, state, and federal construction, plumbing, and environmental codes and regulations. An energy savings performance contract may not include improvements or equipment that allow or cause water from any condensing, cooling, or industrial process or any system of nonpotable usage over which the public water supply system officials do not have sanitary control, to be returned to the potable water supply.

The board may enter into energy savings performance contracts only with persons who are experienced in the design, implementation, and installation of the energy or water conservation measures addressed by the contract.

Government Code Chapter 2269 (Contracting and Delivery Procedures for Construction Projects) does not apply to energy savings performance contracts.

Performance Bond Before entering an energy savings performance contract, the board shall require the provider of the energy or water conservation measures to file with the board a payment and performance bond relating to the installation of the measures in accordance with Government Code Chapter 2253 (Public Work Performance and Payment Bonds). The board may also require a separate bond to cover the value of the guaranteed savings on the contract.

Financing An energy savings performance contract may be financed:

1. Under a lease/purchase contract that has a term not to exceed 20 years from the final date of installation and that meets federal tax requirements for tax-free municipal leasing or long-term financing.
2. With the proceeds of bonds.
3. Under a contract with the provider of the energy or water conservation measures that has a term not to exceed the lesser of 20 years from the final date of installation or the average useful life of the energy or water conservation or usage measures.

Notwithstanding other law, the board may use any available money to pay the provider of the energy or water conservation measures under these provisions, and the board is not required to pay for such costs solely out of the savings realized by the district under an energy savings performance contract. The board may contract with the provider to perform work that is related to, connected with, or otherwise ancillary to the measures identified in the scope of an energy savings performance contract.

An energy savings performance contract shall contain provisions requiring the provider of the energy or water conservation measures to guarantee the amount of the savings to be realized by the district under the contract. If the term of an energy savings performance contract exceeds one year, the district's contractual obligations in any one year during the term of the contract beginning after the final date of installation may not exceed the total energy, water, wastewater, and operating cost savings, including electrical, gas, water, wastewater, or other utility cost savings and operating cost savings resulting from the measures as determined by the district, divided by the number of years in the contract term.

Contract Procurement	An energy savings performance contract shall be let according to the procedures established for professional services by Government Code 2254.004 (the Professional Services Procurement Act). [See CH] Notice of the request for qualifications shall be published in the manner provided for competitive bidding.
Cost Savings Review	Before entering into an energy savings performance contract, the board must require that the cost savings projected by an offeror be reviewed by a licensed professional engineer who has a minimum of three years of experience in energy calculation and review, is not an officer or employee of an offeror for the contract under review, and is not otherwise associated with the contract. In conducting the review, the engineer shall focus primarily on the proposed improvements from an engineering perspective, the methodology and calculations related to cost savings, increases in revenue, and, if applicable, efficiency or accuracy of metering equipment. An engineer who reviews a contract shall maintain the confidentiality of any proprietary information the engineer acquires while reviewing the contract. Occupations Code 1001.053 and 1001.407 (Texas Engineering Practice Act) apply to work performed under the contract. <i>Education Code 44.901</i>
Recycling Program	A district shall: 1. Establish a program for the separation and collection of all recyclable materials generated by the district's operations. 2. Provide procedures for collecting and storing recyclable materials, containers for recyclable materials, and procedures for making contractual or other arrangements with buyers of recyclable materials. 3. Evaluate the amount of recyclable material recycled and modify the recycling program as necessary to ensure that all recyclable materials are effectively and practicably recycled. 4. Establish educational and incentive programs to encourage maximum employee participation. <i>Health and Safety Code 361.425; 30 TAC 328.202</i>
Exemptions	These provisions do not apply to a school district with a student enrollment of less than 10,000 students. A district may exclude one or more recyclable materials from their program if the Texas Commission on Environmental Quality (TCEQ) finds that:

1. A recycling program for a recyclable material is not available through their solid waste provider; or
2. The inclusion of a recyclable material would create a hardship.

A district may request additional consideration from TCEQ if compliance with these provisions would create a hardship.

30 TAC 328.204

Definitions

“Hardship” means a circumstance that causes unreasonable burden on the governmental entity.

“Recyclable material” means a material generated by the entity's operations, including aluminum, steel containers, aseptic packaging and polycoated paperboard cartons, high-grade office paper, and corrugated cardboard.

30 TAC 328.201(2), (3)

Pools

Generally

For required public pool sanitation and safety standards, see Health and Safety Code 341.064 and .0645 and 25 Administrative Code 265.181–.198.

Drains

Each public pool and spa shall comply with the drain cover standards found at 15 U.S.C. Section 8003. “Public pool and spa” means a swimming pool or spa that is open to the public generally, whether for a fee or free of charge. *15 U.S.C. 8003*

Safety Rules

The board may adopt rules for the safety and welfare of students, employees, and property and other rules it considers necessary to carry out Education Code Chapter 37, Subchapter D (Protection of Buildings and Grounds) and the governance of the district, including rules providing for the operation and parking of vehicles on school property. *Education Code 37.102(a)* [See also CLC]

**Identification and
Right to Reject**

Identification may be required of any person on school property. A school administrator, school resource officer, or district peace officer may refuse to allow a person to enter on or may eject a person from property under the district's control in accordance with Education Code 37.105. *Education Code 37.105(a), (b)* [See GKA]

**Human Trafficking
Warning Signs**

Each school shall post warning signs of the increased penalties for trafficking of persons under Penal Code 20A.02(b-1)(2) at the following locations:

1. Parallel to and along the exterior boundaries of the school's premises;
2. At each roadway or way of access to the premises;
3. For premises not fenced, at least every five hundred feet along the exterior boundaries of the premises;
4. At each entrance to the premises and building; and
5. At conspicuous places reasonably likely to be viewed by all persons entering the premises.

Education Code 37.086(b); 19 TAC 61.1053(b)

Each warning sign must:

1. Describe the offense of trafficking in persons as provided under Penal Code 20A.02(a). The sign must emphasize that an offense under Penal Code 20A.02, is a felony of the first degree punishable by imprisonment in the Texas Department of Criminal Justice for life or for a term of not more than 99 years or less than 25 years if it is shown on the trial of the offense that the actor committed the offense in a location that was:
 - a. On the premises of or within 1,000 feet of the premises of a school; or
 - b. On premises or within 1,000 feet of premises where:
 - (1) An official school function was taking place; or
 - (2) An event sponsored or sanctioned by the University Interscholastic League was taking place;

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2. Be written in English and Spanish;
3. Be at least 8.5 by 11 inches in size; and
4. Be properly maintained to ensure readability and protection from the elements for outdoor signs.

Education Code 37.086(c); 19 TAC 61.1053(c)

“School” means a public or private primary or secondary school.

“Premises” means real property and all buildings and appurtenances pertaining to the real property. *Education Code 37.086(a); 19 TAC 61.1053(a); Health and Safety Code 481.134*

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Buildings	A school building must be located on grounds that are well-drained and maintained in a sanitary condition. A school building must be properly ventilated and provided with an adequate supply of drinking water, an approved sewage disposal system, handwashing facilities, a heating system, and lighting facilities that conform to established standards of good public health engineering practices.
Lunchrooms	A school lunchroom must comply with state food and drug regulations.
Custodial Services	A school building and its appurtenances shall be maintained in a sanitary manner. A full-time building custodian or janitor shall know the fundamentals of safety and school sanitation. <i>Health and Safety Code 341.065</i>
Structural Pest Control	A district may obtain pest control services for school buildings only by: 1. Contracting with a person who holds a license to perform the services; or 2. Requiring a district employee who is licensed as a certified noncommercial applicator or technician to perform the services. <i>Occupations Code 1951.459</i>
Integrated Pest Management Program	Each district shall establish, implement, and maintain an integrated pest management (IPM) program. An IPM program is a regular set of procedures for preventing and managing pest problems using an integrated pest management strategy. The school district is responsible for each IPM coordinator's compliance with the regulations in 4 Administrative Code 7.201–.205 (Division 7). <i>Occupations Code 1951.212; 4 TAC 7.201</i>
Definitions	“Integrated pest management” means a pest management strategy that relies on multiple pest control tactics, including the judicious use of pesticides, informed by accurate identification and scientific knowledge of pests, reliable monitoring methods to assess pest presence, preventative measures to avoid pest infestations, and thresholds to determine when corrective control measures are needed. <i>4 TAC 7.114(13)</i> “Area of common access” means an area that an individual is likely to be present in or at on a regular basis, such as a building entranceway, mailboxes, laundry rooms, beverage machines, building bulletin boards, hallways, etc. <i>4 TAC 7.114(3)</i>

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IPM Program
Requirements

The IPM program shall contain these essential elements:

1. A board-approved IPM policy, stating the district's commitment to follow integrated pest management guidelines in all pest control activities that take place on district property. The IPM policy statement shall include:
 - a. A definition of IPM consistent with this section;
 - b. A reference to Texas laws and rules governing pesticide use and IPM in public schools;
 - c. Information about who can apply pesticides on school district property; and
 - d. Information about designating, registering, and required training for the district's IPM coordinator. The superintendent and IPM coordinator shall maintain a copy of the policy.
2. A monitoring program to determine when pests are present and when pest problems are severe enough to justify corrective action;
3. The preferential use of lower risk pesticides and the use of non-chemical management strategies to control pests, rodents, insects, and weeds;
4. A system for keeping records of facility inspection reports, pest-related work orders, pest control service reports, pesticide applications, and pesticide complaints;
5. A plan for educating and informing district employees about their roles in the IPM program; and
6. Written guidelines that identify thresholds for when pest control actions are justified.

4 TAC 7.201(1)

IPM Coordinator

The superintendent shall appoint an IPM coordinator to implement the district's IPM program. Not later than 90 days after the superintendent designates or replaces an IPM coordinator, the district must report to the Texas Department of Agriculture (TDA) the newly appointed coordinator's name, address, telephone number, e-mail address and the effective date of the appointment. A district that appoints more than one IPM coordinator shall designate a responsible IPM coordinator who will have overall responsibility for the IPM program and provide oversight of subordinate IPM coordinators regarding IPM program decisions. When a district removes an IPM coordinator, the departing IPM coordinator, superintendent,

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or superintendent's designee must notify TDA of the removal within ten days in writing. A district may not be without an IPM coordinator for more than 30 days. *Occupations Code 1951.212(e); 4 TAC 7.201(2)*

Training

The IPM coordinator shall:

1. Successfully complete a TDA-approved IPM coordinator training course within six months of appointment; and
2. Obtain at least six hours of TDA-approved IPM continuing education units every three years in accordance with the requirements of 4 Administrative Code 7.202.

Occupations Code 1951.212(f); 4 TAC 7.202

Duties

In addition to implementing the district's IPM program, the IPM coordinator shall oversee and be responsible for:

1. Coordination of pest management personnel, ensuring that all school employees who perform pest control, including those employees authorized to perform incidental use applications, have the necessary training, are equipped with the appropriate personal protective equipment, and have the necessary licenses for their pest management responsibilities;
2. Ensuring that all IPM program records, including incidental use training records, pest-related work orders, pest control service reports, pesticide applications, and pesticide complaints are maintained for a period of two years and are made available to a TDA inspector upon request;
3. Working with district administrators to ensure that all pest control proposal specifications for outside contractors are compatible with IPM principles, and that contractors work under the guidelines of the district's IPM policy;
4. Ensuring that all pesticides used on district property are in compliance with the district's IPM program and that current pesticide labels and safety data sheets (SDS) are available for interested individuals upon request;
5. Overseeing and implementing that portion of the plan that ensures that district administrators and relevant district personnel are provided opportunities to be informed and educated about their roles in the IPM program, reporting, and notification procedures;
6. Ensuring that pesticide applications, including the approval of emergency applications at buildings and on district grounds, are conducted in accordance with Division 7; and

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7. Maintaining a current copy of the school district's IPM policy and making it available to a TDA inspector upon request.

4 TAC 7.202(d)

Licensed Applicator

A district that engages in pest control activities must employ or contract with a licensed applicator, who may, if an employee, also serve as the IPM coordinator. *4 TAC 7.201(3)*

The certified commercial or noncommercial certified applicator or licensed technician shall:

1. Apply only United States Environmental Protection Agency (EPA) labeled pesticides, appropriate for the target pest, except as provided in Division 7;
2. Provide the structural pest management needs of the district by following the district's IPM program and these regulations;
3. Obtain written approval from the IPM coordinator for the use of pesticides in accordance with Division 7;
4. Handle and forward to the IPM coordinator records of IPM activities, any complaints relating to pest problems, and pesticide use;
5. Ensure that pesticide use records are forwarded to the IPM coordinator within two business days or in a time frame as agreed to by the IPM coordinator;
6. Consult with the IPM coordinator concerning the use of control measures in buildings and grounds, including residential properties; and
7. Ensure that all pest control activities are consistent with the district's IPM program and IPM policy.

4 TAC 7.203

Notice

A district shall prior to or by the first week of school attendance, ensure that a procedure is in place to provide prior notification of pesticide applications in accordance with 4 Administrative Code Chapter 7. Individuals who request in writing to be notified of pesticide applications may be notified by telephonic, written, or electronic methods. *4 TAC 7.201(4)*

The chief administrator, IPM coordinator, or building manager must notify individuals who work in a district building of an indoor pest control treatment by:

1. Posting the sign made available by the certified applicator or technician in an area of common access that the individuals

are likely to check on a regular basis at least 48 hours before each planned treatment; and

2. Making available, on request, the consumer information sheet made available by the certified applicator or technician.

Occupations Code 1951.455(a); 4 TAC 7.146(c), .147(e), .148(b)

Chief administrators or the IPM coordinators of schools must notify the parents or guardians of children attending the facility in writing that pesticides are periodically applied indoors and outdoors, and that information on the times and types of applications and prior notification is available upon request. Such notification must be made at the time of the students' registration. Telephonic, written, or electronic notification of planned applications will meet the notification requirements. *4 TAC 7.148(c); Occupations Code 1951.455(b)* [See FD]

*Emergency
Exception*

The pre-notification requirements of 4 Administrative Code 7.146–.148 are waived if the customer and certified applicator sign a statement attesting to the fact that an emergency exists which requires immediate treatment. If such an emergency exists, the consumer information sheet must be made available by the licensee. The statement must be kept on file with the pest control use records. If the customer is not available to sign a statement at the time of treatment, that shall be recorded in the use records along with the customer's name and telephone number. An emergency is defined as an imminent hazard to health. An emergency treatment is limited to the localized area of the emergency. *4 TAC 7.147(g), .148(d)*

Pesticide Use

All pesticides used by districts must be registered with the EPA and the TDA, with the exception of those pesticides that have been exempted from registration by the Federal Insecticide, Fungicide, and Rodenticide Act (FIFRA), Section 25(b). All pesticides used by districts must also bear a label as required by FIFRA and Chapter 76 of the Texas Agriculture Code. Pesticide use must also meet the following requirements:

1. Pest control signs shall be posted at least 48 hours prior to a pesticide application inside district buildings, including residential properties, as provided for under 4 Administrative Code 7.148.
2. For outdoor applications made on district grounds, including residential properties, the treated area must be identified at all entry points with a sign, or must be secured using a locking device, a fence or other practical barrier such as commercially available barrier caution tape, or periodically monitored to

keep students out of the treated area until the allowed reentry time.

3. Pesticides used on district property shall be mixed outside of student occupied areas of buildings and grounds.
4. The use of non-pesticide control measures, non-pesticide monitoring tools and mechanical devices, such as glue boards and traps as permitted in accordance with Division 7, are exempt from posting requirements. The use of non-pesticide tools and devices by unlicensed district personnel, for monitoring purposes, shall be permitted. Monitoring by unlicensed district personnel shall be done only as directed, under the supervision of the IPM coordinator.
5. Pesticide applications shall not be made to outdoor school grounds if such an application will expose students to physical drift of pesticide spray particles. Reasonable preventative measures shall be taken to avoid the potential of drift to occur.
6. Districts are allowed to apply the pesticides to control pests, rodents, insects, and weeds at school buildings, grounds, or other facilities in accordance with the approval for use and restrictions listed for each category detailed in 4 Administrative Code 7.204(6).

4 TAC 7.204

Incidental Use

The Incidental Use For Schools Fact Sheet must contain the text specified in 4 Administrative Code 7.205 and must be provided during pesticide instruction and training by the IPM coordinator to each district employee whose primary duty is not pest control, and whose work may include tasks subject to the exception. The IPM coordinator must keep records of all the training conducted annually. Pest control use records for all incidental pesticide use application, including the reason for application and justification for emergency, must be maintained by the IPM coordinator for two years. *4 TAC 7.205*

Inspections

School districts will be inspected at least once every five years. TDA may waive these requirements due to TDA staff availability, budgetary constraints, inspection trends, or operational efficiencies. School districts demonstrating a lack of compliance with TDA rules may be inspected more frequently based on risk using the following elements of consideration: prior violations, prior inspection results, and prior complaints. *4 TAC 7.149*

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**Integrated Pest
Management
Program**

The District is committed to following integrated pest management (IPM) guidelines as required by Chapter 1951 of the Occupations Code and Title 4, Chapter 7 of the Administrative Code in all pest control activities that take place on District property.

Definition

IPM is a pest management strategy that relies on accurate identification and scientific knowledge of target pests, reliable monitoring methods to assess pest presence, preventative measures to limit pest problems, and thresholds to determine when corrective control measures are needed. Under IPM, whenever economical and practical, multiple control tactics shall be used to achieve the best control of pests. These tactics shall include, but are not limited to, the judicious use of pesticides.

Standards

The District's IPM program shall govern the District's use of pesticides, herbicides, and other chemical agents for the purpose of controlling pests, rodents, insects, and weeds in and around District facilities, including residential property primarily used as student housing.

IPM Coordinator

The Superintendent shall designate the IPM coordinator(s), who shall be registered with the Texas Department of Agriculture. The IPM coordinator(s) shall receive training in accordance with law and shall provide training to District employees, as necessary.

Application Time
Frame

The IPM coordinator(s), in addition to the responsibilities set out in CLB(LEGAL), shall coordinate with appropriate District administrators or other designated and trained employees regarding pesticide or herbicide applications in accordance with law. The IPM coordinator(s) shall determine when an emergency situation exists and an exception to the 48-hour notice requirement may be made.

No Unauthorized
Application

If the IPM coordinator is a licensed applicator, the IPM coordinator may apply pesticides in accordance with law. No other employee or other person or entity shall be permitted to apply a pesticide or herbicide at a District facility, including residential property primarily used as student housing, without the prior approval of the IPM coordinator and other than in the manner prescribed by law and the District's IPM program.

Note: For provisions regarding selection and adoption of instructional materials, see EFA.

**Instructional
Materials and
Technology**

Instructional materials selected for use in the public schools shall be furnished without cost to the students attending those schools. Except as provided by Education Code 31.104(d), a district may not charge a student for instructional material or technological equipment purchased by the district with the district's technology and instructional materials allotment. *Education Code 31.001*

Each instructional material, including electronic instructional material only to the extent of any applicable licensing agreement, purchased as provided by Education Code Chapter 31 for a district is the property of the district. *Education Code 31.102(a)–(b)*

Allotment

A district is entitled to an allotment each biennium from the state instructional materials and technology fund for each student enrolled in the district on a date during the last year of the preceding biennium specified by the commissioner of education. The commissioner shall determine the amount of the allotment per student each biennium on the basis of the amount of money available in the state instructional materials and technology fund to fund the allotment. The allotment shall be transferred from the state instructional materials and technology fund to the credit of the district's instructional materials and technology account as provided by Education Code 31.0212. *Education Code 31.0211(a)*

The commissioner shall, as early as practicable during each biennium, notify each district of the estimated amount to which the district will be entitled during the next fiscal biennium. *Education Code 31.0215(a)*

No Appeal

The amount of the allotment determined by the commissioner is final and may not be appealed. *19 TAC 66.1307(d)*

**Delayed Publisher
Payment Option**

A district may requisition and receive state-adopted instructional materials before allotment funds for those materials are available. The total cost of delayed-payment-option materials requisitioned may not exceed 80 percent of the district's expected allotment for the subsequent biennium.

When a district submits a requisition for instructional materials under this provision, the Texas Education Agency (TEA) will expend a district's existing allotment balance before applying the delayed payment option. TEA will make payment for any remaining balance for a district's order as the allotment funds become available and

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will prioritize payment for requisitions under this provision over reimbursement of purchases made directly by a district.

19 TAC 66.1312(a)–(e)

The commissioner shall ensure that publishers of instructional materials are informed of any potential delay in payment and that payment is subject to the availability of appropriated funds. *Education Code 31.0215(d)*

Publishers may decline orders for which payments could be delayed. A publisher's decision to decline an order shall affect all of that publisher's orders for which payments could be delayed. Publishers may not selectively decline individual orders or orders from individual districts. *19 TAC 66.1312(f); Education Code 31.0215(d)*

Government Code Chapter 2251 (payments for goods and services) does not apply to requisitions under this provision. *Education Code 31.0215(e); 19 TAC 66.1312(g)*

Allotment
Adjustment
*Change in
Enrollment*

Not later than May 31 of each school year, a district may request that the commissioner adjust the number of students for which the district is entitled to receive an allotment on the grounds that the number of students attending school in the district will increase or decrease during the school year for which the allotment is provided. The commissioner may also adjust the number of students for which a district is entitled to receive an allotment, without a request by the district, if the commissioner determines a different number of students is a more accurate reflection of students who will be attending school in the district. The commissioner's determination is final. *Education Code 31.0211(e)*

*High Enrollment
Growth*

Each year the commissioner shall adjust the instructional materials and technology allotment of districts experiencing high enrollment growth. *Education Code 31.0214(a)*

High-enrollment growth adjustments will be based on the difference between the district's percentage of enrollment growth and that of the state. Enrollment growth calculations will be determined each fiscal year based on fall Texas Student Data Systems Public Education Information Management System (TSDS PEIMS) enrollment data. The amount of the adjustment determined by the commissioner is final and may not be appealed.

If sufficient funds are available, high-enrollment growth adjustments will be granted once each fiscal year. Notwithstanding this, a district that experiences an unexpected growth:

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1. Of at least two percent due to a natural or man-made disaster or catastrophic event may apply for additional allotment funding at any time during a fiscal year.
2. In its bilingual population of at least ten percent in any school year may apply for additional bilingual allotment funding at any time during a fiscal year.

Any additional funding will be dependent on the availability of funds.

The per-student high-enrollment growth adjustment granted in the second year of a biennium shall not exceed one-half of the per-student amount established as the biennial allotment.

19 TAC 66.1309

Permitted
Expenditures

Each district's allotment funds must be expended according to the following priorities established in Education Code 31.0211:

1. First, instructional materials necessary to permit the district to certify that the district has instructional materials that cover all elements of the essential knowledge and skills of the required curriculum, other than physical education, for each grade level as required by Education Code 28.002; and
2. Then, any other instructional materials or allowed technological equipment.

Maintaining the priorities above, the allotment funds may be used to pay for:

1. Instructional materials on the list adopted by the commissioner under Education Code 31.0231;
2. Instructional materials on the list adopted by the State Board of Education (SBOE) under Education Code 31.024;
3. Non-adopted instructional materials;
4. Consumable instructional materials;
5. Instructional materials for use in bilingual education classes, as provided by Education Code 31.029;
6. Versions of non-adopted instructional materials that are fully accessible to students with disabilities;
7. Instructional materials for use in college preparatory courses under Education Code 28.014, as provided by Education Code 31.031;

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8. Supplemental instructional materials, as provided by Education Code 31.035;
9. State-developed open-source instructional materials, as provided by Education Code Chapter 31, Subchapter B-1;
10. Instructional materials and technological equipment under any continuing contracts of the district in effect on September 1, 2011;
11. Activities related to the local review and adoption of instructional materials;
12. Technological equipment that contributes to student learning, including equipment that supports the use of instructional materials;
13. Training educational personnel directly involved in student learning in the appropriate use of instructional materials;
14. Providing access to technological equipment for instructional use;
15. The salary and other expenses of an employee who provides technical support for the use of technological equipment directly involved in student learning;
16. Inventory software or systems for storing, managing, and accessing instructional materials;
17. Software for analyzing the use and effectiveness of instructional materials;
18. Services, equipment, and technology infrastructure necessary to ensure internet connectivity and adequate bandwidth;
19. Costs associated with distance learning, including services, equipment, and technology such as Wi-Fi, internet access hotspots, wireless network service, broadband service, and other services and technological equipment to ensure internet access; and
20. Training for personnel in the electronic administration of assessment instruments.

The allotment funds may not be used to pay for:

1. Services for installation;
2. The physical conduit that transmits data such as cabling and wiring or electricity, except to the extent allotment funds are

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necessary to pay for allowable expenses under items 18 and 19, above;

3. Office and school supplies;
4. Items that are not directly related to student instruction such as furniture, athletic equipment, extension cords, temporary contractors, or video surveillance equipment;
5. Travel expenses; or
6. Equipment used for moving or storing instructional materials.

19 TAC 66.1307(e)–(g); Education Code 31.0211(c)

*Technological
Equipment*

In purchasing technological equipment, a district shall:

1. Secure technological solutions that meet the varying and unique needs of students and teachers in the district; and
2. Consider both the long-term cost of ownership of the technological equipment and flexibility for innovation.

19 TAC 66.1307(l); Education Code 31.0211(d-1)

Certification of
Allotment

A district shall annually certify to the commissioner that the district's allotment has been used only for permitted expenses. *Education Code 31.0213*

**Instructional
Materials and
Technology Account**

The commissioner shall maintain an instructional materials and technology account for each district. In the first year of each biennium, the commissioner shall deposit the district's allotment in the account. The commissioner shall pay the cost of instructional materials requisitioned by a district under Education Code 31.103 using funds from the district's instructional materials and technology account.

A district may also use funds in the district's account to purchase electronic instructional materials or technological equipment. The district shall submit to the commissioner a request for funds for this purpose from the district's account in accordance with the commissioner's rules.

Money deposited in a district's instructional materials and technology account during each state fiscal biennium remains in the account and available for use by the district for the entire biennium. At the end of each biennium, a district with unused money in the district's account may carry forward any remaining balance to the next biennium.

Education Code 31.0212

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Access to Allotment

The allotment for each biennium will be made available for district use through the state's online instructional material ordering system as early as possible in the fiscal year preceding the beginning of the biennium for which the funds have been appropriated. A district may access its allotment for any upcoming school year upon completion of:

1. Submission to the commissioner certification that:
 - a. The district has instructional materials that cover all the required Texas Essential Knowledge and Skills (TEKS), except those for physical education, as required by Education Code 31.004 [see Certification of Instructional Materials, below]; and
 - b. The district has used its allotment for only allowable expenditures [see Permitted Expenditures and Certification of Allotment Use, above]; and
2. Preparation by TEA of the state ordering system for the new school year with the new allotment amounts.

Upon completion of these requirements, a district may access its funds by correctly providing all information required in the state ordering system.

19 TAC 66.1307(h)–(j)

Online Requisition System

The commissioner shall maintain an online requisition system for districts to requisition instructional materials to be purchased with the district's allotment. *Education Code 31.101(f)*

Delegation of Authority

The board may delegate to an employee the authority to requisition, distribute, and manage the inventory of instructional materials, consistent with Education Code Chapter 31 and rules adopted under that chapter. *Education Code 31.104(a)*

Local Funds

A district may use local funds to purchase any instructional materials in addition to those selected under Education Code Chapter 31. *Education Code 31.106*

Requisitions, Use, and Distribution

A district shall make a requisition for instructional materials using the online requisition program maintained by the commissioner. A district may requisition instructional materials on the SBOE instructional materials list for grades above the grade level in which a student is enrolled. *Education Code 31.103(b)–(c)*

Distribution

The board shall distribute printed instructional materials to students in the manner that the board determines is most effective and economical. *Education Code 31.102(c)*

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Supplemental
Instructional
Materials

A district may requisition supplemental instructional material adopted by the SBOE but not on the instructional material list adopted under Education Code 31.023 only if the district requisitions the supplemental instructional material along with other supplemental instructional materials or instructional materials on the list adopted under Education Code 31.023 that in combination cover each element of the essential knowledge and skills for the course for which the district is requisitioning the supplemental instructional materials. *Education Code 31.035(d)*

Availability of Open
Education Resource
Instructional
Materials

A district that selects open education resource instructional material shall requisition a sufficient number of printed copies for use by students unable to access the instructional material electronically unless the district provides to each student:

1. Electronic access to the instructional material at no cost to the student; or
2. Printed copies of the portion of the instructional material that will be used in the course.

Education Code 31.103(d)

Employee Training

The board shall require the employee responsible for ordering instructional materials to complete TEA-developed training in the use of the allotment and the use of the instructional materials ordering system known as EMAT. Training shall be completed prior to ordering instructional materials for the first time and again each time the district is notified by TEA that the training has been updated. The district shall maintain documentation of the completion of the required training. *19 TAC 66.107(d)*

**Special Instructional
Materials**

All laws and rules applying to instructional materials provided to students with no disabilities that are not in conflict with Education Code 31.028 or 19 Administrative Code 66.1311 shall apply to the distribution and control of special instructional materials. Special instructional materials include braille, large-print, and audio books and any other formats designed specifically to provide equal access to students with disabilities.

Requisitions for special instructional materials shall be based on actual student enrollment but may include up to two copies per student if necessary to meet individual need.

Special instructional materials are the property of the state. A district is responsible for replacing or reimbursing the state for lost, stolen, or damaged special instructional materials.

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For Teachers

Adopted instructional materials needed by a teacher with a print disability to carry out his or her instructional duties shall be furnished in the required format without cost. The materials are to be loaned to the district as long as needed and are to be returned to the state when they are no longer needed.

For Parents

Adopted instructional materials in a specialized format that are requested by a parent with a print disability shall be furnished without cost by the state. Requests for electronic files shall be filled by TEA after the parent signs and TEA receives a statement, through the district, promising that the parent will safeguard the security of the files and observe all current copyright laws, including those that forbid reproduction of the files and their transfer to other parties. All specialized instructional material formats and electronic files that have been provided must be returned to the local school district at the end of the school year.

19 TAC 66.1311(a)–(d), (h), (j)

**Bilingual
Instructional
Materials**

A district shall purchase with its allotment or otherwise acquire instructional materials for use in bilingual education classes. The commissioner shall determine the amount of the allotment for bilingual education based on TSDS PEIMS bilingual enrollment data from the fall collection of the school year preceding the first year of each biennium. *Education Code 31.029; 19 TAC 66.1307(c)*

**Certification of
Instructional
Materials**

Prior to the beginning of each school year, a district shall submit to the SBOE and commissioner certification that for each subject in the required curriculum under Education Code 28.002, other than physical education, and each grade level, the district provides each student with instructional materials that cover all elements of the essential knowledge and skills adopted by the SBOE for that subject and grade level. The certification shall be submitted in a format approved by the commissioner and can be based on both state-adopted and non-state-adopted materials.

To determine whether each student has instructional materials that cover all elements of the essential knowledge and skills, a district may consider:

1. Instructional materials adopted by the SBOE;
2. Materials adopted or purchased by the commissioner under Education Code 31.0231 or Education Code Chapter 31, Subchapter B-1;
3. Open education resource instructional materials submitted by eligible institutions and adopted by the SBOE;

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4. Open education resource instructional materials made available by other public schools;
5. Instructional materials developed or purchased by the district; and
6. Open education resource instructional materials and other electronic instructional materials included in the repository under Education Code 31.083.

Each district shall certify, in a format approved by the commissioner, that the district protects against access to obscene or harmful content in compliance with the requirements for certification under the Children's Internet Protection Act, 47 U.S.C. 254(h)(5)(B) and (C). [See CQ]

The certifications shall be ratified by the board in a public, noticed meeting.

Education Code 31.004; 19 TAC 66.105

Ownership

Except as otherwise provided, a student must return all instructional materials to the teacher at the end of the school year or when the student withdraws from school. At the end of the school year for which open education resource instructional material that a district does not intend to use for another student is distributed, the printed copy of the open education resource instructional material becomes the property of the student to whom it is distributed.

This provision does not apply to an electronic copy of open education resource instructional material.

Education Code 31.104(c), (g)–(h); 19 TAC 66.107(b)

**Responsibility for
Instructional
Materials and
Equipment**

Each student or the student's parent or guardian is responsible for all instructional material and technological equipment not returned in an acceptable condition by the student. A student who fails to return in an acceptable condition all instructional materials and technological equipment forfeits the right to free instructional materials and technological equipment until all instructional materials and technological equipment previously issued but not returned in an acceptable condition are paid for by the student, parent, or guardian.

As provided by board policy, a district may waive or reduce the payment required if the student is from a low-income family. [See FP] The district shall allow the student to use instructional materials and technological equipment at school during each school day.

If instructional materials or technological equipment is not returned in an acceptable condition or paid for, a district may withhold the

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student's records. A district may not prevent the student from graduating, participating in a graduation ceremony, or receiving a diploma. [See FL and GBA regarding student and parental right to access records; and FD, FFAB, and FL regarding a district's duties to provide records to another district]

The board may not require an employee of the district who acts in good faith to pay for instructional materials or technological equipment that is stolen, misplaced, or not returned by a student. [See DG]

These provisions do not apply to an electronic copy of open education resource instructional material.

Education Code 31.104(d), (e), (h); 19 TAC 66.107(c) [See also EF]

Acceptable
Condition

Printed instructional materials are considered to be in acceptable condition if:

1. The cover, binding, pages, spine, and all integral components of the instructional materials are wholly intact and the instructional materials are fully usable by students; and
2. No component of the instructional materials is soiled, torn, or damaged (whether intentionally or by lack of appropriate care) to the extent that any portion of the content is too disfigured or obscured to be fully accessible to other students.

Electronic instructional materials are considered to be in acceptable condition if:

1. All components or applications that are a part of the electronic instructional materials are returned;
2. The electronic materials perform as they did when they were new;
3. The electronic instructional materials do not contain computer code (e.g., bug, virus, worm, or similar malicious software) that has been designed to self-replicate, damage, change, or otherwise hinder the performance of any computer's memory, file system, or software; and
4. The electronic instructional materials have not been installed with plug-ins, snap-ins, or add-ins without the prior approval of the district.

Technological equipment is considered to be in acceptable condition if:

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1. The equipment is returned with the software and hardware in their original condition unless the district authorized changes; and
2. The physical condition of the equipment is fully usable as it was originally intended to be used.

19 TAC 66.1310

Lost or Damaged Instructional Materials	A district may order replacements for instructional materials that have been lost or damaged directly from the publisher of the instructional materials or any source for a printed copy of open education resource instructional material. <i>Education Code 31.104</i>
Sale or Disposal	The board shall determine how the district will dispose of discontinued printed instructional materials, electronic instructional materials, and technological equipment.
Sale	The board may sell printed instructional materials on the date the instructional material is discontinued for use in the public schools by the SBOE or the commissioner. The board may also sell electronic instructional materials and technological equipment owned by the district.
<i>Use of Proceeds</i>	Any funds received by a district from a sale must be used to purchase instructional materials and technological equipment allowed under Education Code 31.0211.
Disposal	The board may dispose of printed instructional material before the date the instructional material is discontinued for use in the public schools by the SBOE if the board determines that the instructional material is not needed by the district and the board does not reasonably expect that the instructional material will be needed. A district must notify the commissioner of any instructional material the district disposes of under this provision. <i>Education Code 31.105</i>
Annual Inventory	A district shall conduct an annual physical inventory of all currently adopted instructional materials that have been requisitioned by and delivered to the district. The results of the inventory shall be recorded in the district's files. <i>19 TAC 66.107(a)</i>
Local Handling Expenses	School districts shall not be reimbursed from state funds for expenses incurred in local handling of instructional materials. <i>19 TAC 66.104(d)</i>

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Safety Standards

A district shall meet or exceed the safety standards for school buses established by the Department of Public Safety (DPS), with the advice of the Texas Education Agency (TEA). A district that fails or refuses to meet these safety standards for school buses is ineligible to share in the transportation allotment until the first anniversary of the date the district begins complying with the safety standards. *Education Code 34.002; Transp. Code 547.102; 37 TAC 14.51–.52*

Student Safety

Prohibitions

A district may not require or allow a child to stand on a moving bus or passenger van. *Education Code 34.004*

An operator of a school bus, while operating the bus, shall prohibit a passenger from:

1. Standing in the bus; or
2. Sitting:
 - a. On the floor of the bus, or
 - b. In any location on the bus that is not designed as a seat.

Transp. Code 545.426

Seat Belts

*Required on
Buses*

A bus, including a school bus, a school activity bus, multifunction school activity bus, or school-chartered bus, operated by or contracted for use by a district for the transportation of schoolchildren shall be equipped with a three-point seat belt for each passenger, including the operator. This requirement does not apply to:

1. A bus purchased by a school district that is a model year 2017 or earlier; or
2. A bus purchased by a school district that is a model year 2018 or later if the board:
 - a. Determines that the district's budget does not permit the district to purchase a bus that is equipped with the required seat belts; and
 - b. Votes to approve that determination in a public meeting.

Transp. Code 547.701(e)

*Student
Requirement*

A district shall require a student riding a bus operated by or contracted for operation by the district to wear a seat belt if the bus is equipped with seat belts for all passengers on the bus. A school district may implement a disciplinary policy to enforce the use of seat belts by students. *Education Code 34.013*

Donations

A board shall consider any offer made by a person to donate three-point seat belts or money for the purchase of three-point seat belts for a district's school buses. A board may accept or decline the offer after adequate consideration.

A board may acknowledge a person who donates three-point seat belts or money for the purchase of three-point seat belts for a school bus by displaying a small, discreet sign on the side or back of the bus recognizing the person who made the donation. The sign may not serve as an advertisement for the person who made the donation.

Education Code 34.014

Use of Warning
Signals

When a school bus is being stopped or is stopped on a highway to permit students to board or exit the bus, the operator of the bus shall activate all flashing warning signal lights and other equipment on the bus designed to warn other drivers that the bus is stopping to load or unload children.

A person may not operate a light or other equipment described above except when a school bus is being stopped or is stopped on a highway to:

1. Permit a student to board or exit the bus; or
2. Distribute to a student or the parent or guardian of a student:
 - a. Food; or
 - b. Technological equipment for use by the student for educational purposes.

Transp. Code 547.701(c), (c-1)

**Wireless
Communication
Devices**

General Rule

An operator commits an offense if the operator uses a portable wireless communication device to read, write, or send an electronic message while operating a motor vehicle unless the vehicle is stopped. *Transp. Code 545.4251(b)*

School Property

An operator may not use a wireless communication device while operating a motor vehicle within a school crossing zone or on the property of a public elementary, middle, junior high, or high school served by a school crossing zone, during the time a reduced speed limit is in effect for the school crossing zone, unless:

1. The vehicle is stopped; or
2. The wireless communication device is used with a hands-free device.

Transp. Code 545.4252

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An operator may not use a wireless communication device while operating a school bus or passenger bus with a minor passenger on the bus unless the bus is stopped. This provision does not apply to an operator of a school bus or passenger bus using a wireless communication device in the performance of the operator's duties as a bus driver and in a manner similar to using a two-way radio. *Transp. Code 545.425(c), (e-1)*

Definitions

"Hands-free device" means speakerphone capability, a telephone attachment, or another function or other piece of equipment, regardless of whether permanently installed in or on a wireless communication device or in a motor vehicle, that allows use of the wireless communication device without use of either of the operator's hands, except to activate or deactivate a function of the wireless communication device or hands-free device. The term includes voice-operated technology and a push-to-talk function. *Transp. Code 545.425(a)(1)*

"Electronic message" means data that is read from or entered into a wireless communication device for the purpose of communicating with another person. *Transp. Code 545.4251(a)(1)*

**Disruption of
Transportation**

Any person other than a primary or secondary grade student who intentionally disrupts, prevents, or interferes with the lawful transportation of students to and from school on a vehicle owned or operated by a district or to or from activities sponsored by a school on a vehicle owned and/or operated by a district shall be guilty of a misdemeanor. It is an exception to the application of the offense that, at the time the person engaged in the prohibited conduct, the person was younger than 12 years of age. *Education Code 37.126*

Exhibition of Firearm

For information regarding offenses pertaining to firearms on buses, see GKA(LEGAL).

Accident Reports

Notice to DPS

A district shall provide DPS written notification of any accident directly or indirectly involving a school bus operated by or for the district that bears advertising or another paid announcement. *37 TAC 14.65(a)(2)*

Notice must be received not more than five days from the date of the accident and shall include the following:

1. The name and address of the owner of the school bus;
2. The name and driver's license number of the school bus operator;
3. The date of the accident;
4. The city or county where the accident occurred; and

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5. The investigating police agency.

37 TAC 14.65(c)

Notices to DPS may be delivered by facsimile, electronic mail, or mailed to School Bus Transportation, Texas Department of Public Safety, P.O. Box 4087, Austin, TX 78773-0525. *37 TAC 14.65(d)*

Notice to TEA

A district shall report annually to TEA the number of accidents in which its buses were involved in the past year in a manner prescribed by the commissioner of education. A district shall file the annual report to TEA only in the period beginning July 1 and ending July 31 and shall include the following information in the report:

1. The total number of bus accidents;
2. The date each accident occurred;
3. The type of bus, as specified in 19 Administrative Code 61.1028(a), involved in each accident;
4. Whether the bus involved in each accident was equipped with seat belts and, if so, the type of seat belts;
5. The number of students and adults involved in each accident;
6. The number and types of injuries that were sustained by the bus passengers in each accident; and
7. Whether the injured passengers in each accident were wearing seat belts at the time of the accident and, if so, the type of seat belts.

A school district shall report a bus accident involving a school bus, a multifunction school activity bus, a school activity bus, or a motor bus if:

1. The bus is owned, leased, contracted, or chartered by a school district and was transporting school district personnel, students, or a combination of personnel and students; or
2. The bus was driven by a school district employee or by an employee of the school district's bus contractor with no passengers on board and the accident involved a collision with a pedestrian.

Exceptions

A school district shall not report a bus accident involving a school bus, a multifunction school activity bus, a school activity bus, or a motor bus if:

1. The bus was driven by a school district employee or by an employee of the school district's bus contractor, the accident

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occurred when no passenger other than the school district's driver or bus contractor's driver was on board the bus, and the accident did not involve a collision with a pedestrian; or

2. The accident involved a bus chartered by a school district for a school activity trip and no school district personnel or students were on board the bus at the time of the accident.

A school district shall not report an accident that occurred in a vehicle that is owned, contracted, or chartered by a school district and is not a school bus, a multifunction school activity bus, a school activity bus, or a motor bus.

Education Code 34.015(b); 19 TAC 61.1028(b)

**Texas Department of
Agriculture Authority**

The Texas Department of Agriculture (TDA) administers federal and state nutrition programs, including the National School Lunch Program (NSLP) under 42 U.S.C. Section 1751 et seq., and the School Breakfast Program (SBP) under 42 U.S.C. Section 1773. *Agriculture Code 12.0025*

Note: Regulations applicable to federal nutrition programs are found at the following:

7 C.F.R. 210: National School Lunch Program

7 C.F.R. 215: Special Milk Program for Children

7 C.F.R. 220: School Breakfast Program

7 C.F.R. 225: Summer Food Service Program

7 C.F.R. 245: Free and Reduced Price Eligibility

Program Compliance

TDA shall require that school food authorities (SFAs) comply with the applicable provisions 7 C.F.R. Part 210. TDA shall ensure compliance through audits, administrative reviews, technical assistance, training guidance materials or by other means. *7 C.F.R. 210.19(a)(3)*

[For the definition of “school food authority,” see COA(LEGAL).]

**Administrative
Review**

TDA must conduct administrative reviews of all SFAs participating in the NSLP (including the Afterschool Snacks and the Seamless Summer Option) and SBP at least once during a 3-year review cycle, provided that each SFA is reviewed at least once every 4 years.

“Administrative reviews” means the comprehensive off-site and/or on-site evaluation of all SFAs participating in the specified programs. The term administrative review is used to reflect a review of both critical and general areas in accordance with 7 C.F.R. 210.18(g) and (h), as applicable for each reviewed program, and includes other areas of program operations determined by TDA to be important to program performance.

7 C.F.R. 210.18

Appeals

Appeals related to the federal food and nutrition programs administered by TDA and any actions affecting participation in such programs are governed by 4 Administrative Code, Chapter 26, Subchapter E. *4 TAC 26.200–.207*

	Note: For recordkeeping and retention information, see TDA's Food and Nutrition Division Administrator's Reference Manual , ¹ Section 30, <i>Records Retention</i> .
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School Nutrition Professional Standards	An SFA that operates the NSLP or the SBP must establish and implement professional standards for school nutrition program directors, managers, and staff. <i>7 C.F.R. 210.30(a)</i>
Minimum Standards for Program Directors	Each SFA must ensure that all newly hired school nutrition program directors meet minimum hiring standards and ensure that all new and existing directors have completed the minimum annual training/education requirements for school nutrition program directors, as set forth in 7 C.F.R. 210.30. <i>7 C.F.R. 210.30(b)</i>

	Note: All school nutrition program directors hired on or after July 1, 2015, must meet the required minimum educational requirements based on student enrollment. See <i>Summary of School Nutrition Program Director Professional Standards by Local Educational Agency Size chart</i> , 7 C.F.R. 210.30(b)(2).
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Exempt Fundraisers	Schools that participate in the NSLP or SBP may sell food and beverages that do not meet nutritional standards outlined in 7 C.F.R. Parts 210 and 220 as part of a fundraiser, during the school day, for up to six days per school year on each school campus, provided that no specially exempted fundraiser foods or beverages may be sold in competition with school meals in the food service area during the meal service. <i>4 TAC 26.2</i>
Definitions	"School day" means the midnight before, to 30 minutes after the end of the official school day. "School campus" means all areas of the property under the jurisdiction of the school that are accessible to students during the school day. <i>4 TAC 26.1</i>
Unpaid Meal Charges	The board of a district that allows students to use a prepaid meal card or account to purchase meals served at schools in the district shall adopt a grace period policy regarding the use of the cards or accounts. The policy:
State Law	1. Must allow a student whose meal card or account balance is exhausted or insufficient to continue, for a period determined by the board, to purchase meals by:

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- a. Accumulating a negative balance on the student's card or account; or
 - b. Otherwise receiving an extension of credit from the district;
2. Must require the district to notify the parent of or person standing in parental relation to the student that the student's meal card or account balance is exhausted;
3. May not permit the district to charge a fee or interest in connection with meals purchased under item 1, above; and
4. May permit the district to set a schedule for repayment on the account balance as part of the notice to the parent or person standing in parental relation to the student.

Education Code 33.908

Federal Law

An SFA operating a NSLP and/or SBP must:

1. Have a written and clearly communicated meal charge policy in order to ensure a consistent and transparent approach to the issue of how students who pay the full or reduced price cost of a reimbursable meal are impacted by having insufficient funds on hand or in their account to purchase a meal.
2. Include policies regarding the collection of delinquent meal charge debt in the written meal charge policy.
3. Ensure that the policy is provided in writing to all households at the start of each school year and to households that transfer to the school during the school year.
4. Provide the meal charge policy to all school or SFA-level staff responsible for policy enforcement, including school food service professionals responsible for collecting payment for meals at the point of service, staff involved in notifying families of low or negative balances, and staff involved in enforcing any other aspects of the meal charge policy.

Excerpts from *USDA Memo SP 46-2016, [Unpaid Meal Charges: Local Meal Charge Policies](#)*² (July 8, 2016)

Lauren's Law

A district may not adopt any rule, policy, or program under Education Code 28.002(a), (k), (l), (l-1), or (l-2) that would prohibit a parent or grandparent of a student from providing any food product of the parent's or grandparent's choice to:

1. Children in the classroom of the child on the occasion of the child's birthday; or

2. Children at a school-designated function.

Education Code 28.002(l-3)(2)

Donation of Food

A district may allow a campus to elect to donate food to a nonprofit organization through a person who is directly and officially affiliated with the campus, including a teacher or counselor, or through a parent of a student enrolled at the campus. The donated food may be received, stored, and distributed on the campus. Food donated by the campus may include:

1. Surplus food prepared for breakfast, lunch, or dinner meals or snacks served from the campus cafeteria, subject to any applicable local, state, and federal requirements; or
2. Food donated to the campus as the result of a food drive or similar event.

The type of food donated under item 1 above may include:

1. Packaged unserved food that is packaged on the campus of a district and has not been removed from the campus cafeteria;
2. Packaged served food if the packaging and food are in good condition;
3. Whole, uncut produce; and
4. Wrapped raw unserved produce.

Food that by law must be maintained at a certain temperature for safety may not be donated unless the campus has maintained the food at the required temperature.

Food donated under these provisions to a nonprofit may be distributed at the campus at any time. Campus employees may assist in preparing and distributing the food as volunteers of the nonprofit organization.

Under this program, a district may adopt a policy under which the district provides food at no cost to a student for breakfast, lunch, or dinner meals or a snack if the student is unable to purchase such meals or snack.

Education Code 33.907

¹ TDA's Food and Nutrition Division Administrator's Reference Manual: <https://squaremeals.org/Programs/NationalSchoolLunchProgram/PolicyARM.aspx>

² USDA Memo *Unpaid Meal Charges: Local Meal Charge Policies*: <https://fns-prod.azureedge.us/sites/default/files/cn/SP46-2016os.pdf>

Next Generation Technology	A district, in the administration of the district, shall consider using next generation technologies, including cryptocurrency, blockchain technology, robotic process automation, and artificial intelligence. <i>Gov't Code 2054.601</i>
Children's Internet Protection Act	"Harmful to minors" means any picture, image, graphic image file, or other visual depiction that:
Definitions <i>Harmful to Minors</i>	1. Taken as a whole and with respect to minors, appeals to a prurient interest in nudity, sex, or excretion; 2. Depicts, describes, or represents, in a patently offensive way with respect to what is suitable for minors, an actual or simulated sexual act or sexual contact, actual or simulated normal or perverted sexual acts, or a lewd exhibition of the genitals; and 3. Taken as a whole, lacks serious literary, artistic, political, or scientific value as to minors. <i>47 U.S.C. 254(h)(7)(G); 20 U.S.C. 7131(e)(6)</i>
<i>Technology Protection Measure</i>	"Technology protection measure" means a specific technology that blocks or filters internet access to the material covered by a certification described at Certifications to the FCC, below, to which such certification relates. <i>47 U.S.C. 254(h)(7)(I)</i>
Universal Service Discounts (E-Rate)	An elementary or secondary school having computers with internet access may not receive universal service discount rates unless the district submits to the FCC the certifications described below at Certifications to the FCC and a certification that an internet safety policy has been adopted and implemented as described at Internet Safety Policy, below, and ensures the use of computers with internet access in accordance with the certifications. <i>47 U.S.C. 254(h)(5)(A); 47 C.F.R. 54.520</i>
<i>Certifications to the FCC</i>	A district that receives discounts for internet access and internal connections services under the federal universal service support mechanism for schools must make certifications in accordance with 47 C.F.R. 54.520(c) each funding year. A district that only receives discounts for telecommunications services is not subject to the certification requirements, but must indicate that it only receives discounts for telecommunications services. <i>47 C.F.R. 54.520(b)</i>
With Respect to Minors	A certification under 47 U.S.C. 254(h)(5)(B) is a certification that the district is: 1. Enforcing a policy of internet safety for minors that includes monitoring their online activities and the operation of a tech-

nology protection measure with respect to any of its computers with internet access that protects against access through such computers to visual depictions that are obscene, child pornography, or harmful to minors;

2. Enforcing the operation of such technology protection measure during any use of such computers by minors; and
3. Educating minors, as part of its internet safety policy, about appropriate online behavior, including interacting with other individuals on social networking websites and in chat rooms and cyberbullying awareness and response.

47 U.S.C. 254(h)(5)(B); 47 C.F.R. 54.520(c)(1)

With Respect to
Adults

A certification under 47 U.S.C. 254(h)(5)(C) is a certification that the district is:

1. Enforcing a policy of internet safety that includes the operation of a technology protection measure with respect to any of its computers with internet access that protects against access through such computers to visual depictions that are obscene or child pornography; and
2. Enforcing the operation of such technology protection measure during any use of such computers.

47 U.S.C. 254(h)(5)(C); 47 C.F.R. 54.520(c)(1)

*Disabling for
Adults*

An administrator, supervisor, or other person authorized by the district may disable the technology protection measure during use by an adult to enable access for bona fide research or other lawful purpose. *47 U.S.C. 254(h)(5)(D)*

*Internet Safety
Policy*

A district shall adopt and implement an internet safety policy that addresses:

1. Access by minors to inappropriate matter on the internet and the World Wide Web;
2. The safety and security of minors when using electronic mail, chat rooms, and other forms of direct electronic communications;
3. Unauthorized access, including "hacking," and other unlawful activities by minors online;
4. Unauthorized disclosure, use, and dissemination of personal identification information regarding minors; and

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5. Measures designed to restrict minors' access to materials harmful to minors.

47 U.S.C. 254(l); 47 C.F.R. 54.520(c)(1)(ii)

Public Hearing A district shall provide reasonable public notice and hold at least one public hearing or meeting to address the proposed internet safety policy. *47 U.S.C. 254(h)(5)(A)(iii), (l)(1)(B)*

Inappropriate for Minors A determination regarding what matter is inappropriate for minors shall be made by the board or designee. *47 U.S.C. 254(l)(2)*

Noncompliance A district that knowingly fails to submit required certifications shall not be eligible for discount services under the federal universal service support mechanism for schools until such certifications are submitted.

A district that knowingly fails to ensure the use of computers in accordance with the required certifications must reimburse any funds and discounts received under the federal universal service support mechanism for schools for the period in which there was noncompliance.

47 C.F.R. 54.520(d), (e); 47 U.S.C. 254(h)(5)(F)

ESEA Funding No federal funds made available under Title IV, Part A of the ESEA for an elementary or secondary school that does not receive universal service discount rates may be used to purchase computers used to access the internet, or to pay for direct costs associated with accessing the internet unless a district:

1. Has in place a policy of internet safety for minors that includes the operation of a technology protection measure that protects against access to visual depictions that are obscene, child pornography, or harmful to minors; and enforces the operation of the technology protection measure during any use by minors of its computers with internet access; and
2. Has in place a policy of internet safety that includes the operation of a technology protection measure that protects against access to visual depictions that are obscene or child pornography; and enforces the operation of the technology protection measure during any use of its computers with internet access.

An administrator, supervisor, or other person authorized by the district may disable the technology protection measure to enable access for bona fide research or other lawful purposes.

<i>Certification to U.S. Department of Education</i>	A district shall certify its compliance with these requirements during each annual program application cycle under the ESEA. <i>20 U.S.C. 7131</i>
Uniform Electronic Transactions Act (UETA)	The UETA (Business and Commerce Code Chapter 322) applies to electronic records and electronic signatures relating to a transaction. <i>Business and Commerce Code 322.003(a)</i> The UETA applies only to transactions between parties each of which has agreed to conduct transactions by electronic means. The UETA does not require a record or signature to be created, generated, sent, communicated, received, stored, or otherwise processed or used by electronic means or in electronic form. A party that agrees to conduct a transaction by electronic means may refuse to conduct other transactions by electronic means. This right may not be waived by agreement. <i>Business and Commerce Code 322.005(a)–(c)</i> Except as otherwise provided in Business and Commerce Code 322.012(f), the UETA does not require a district to use or permit the use of electronic records or electronic signatures. <i>Business and Commerce Code 322.017(c)</i>
Records Retention	If a law requires that a record be retained, the requirement is satisfied by retaining an electronic record of the information in the record which: 1. Accurately reflects the information set forth in the record after it was first generated in its final form as an electronic record or otherwise; and 2. Remains accessible for later reference. A record retained as an electronic record in accordance with the provisions above satisfies a law requiring a person to retain a record for evidentiary, audit, or like purposes, unless a law enacted after January 1, 2002, specifically prohibits the use of an electronic record for the specified purpose. <i>Business and Commerce Code 322.012(a), (f)</i> [For more information on records management, see CPC.]
Definitions	"Electronic record" means a record created, generated, sent, communicated, received, or stored by electronic means. "Electronic signature" means an electronic sound, symbol, or process attached to or logically associated with a record and executed or adopted by a person with the intent to sign the record.

"Transaction" means an action or set of actions occurring between two or more persons relating to the conduct of business, commercial, or governmental affairs.

Business and Commerce Code 322.002(7), (8), (15)

Digital Signature

A digital signature may be used to authenticate a written electronic communication sent to a district if it complies with rules adopted by the board. Before adopting the rules, the board shall consider the rules adopted by the Department of Information Resources (DIR) and, to the extent possible and practicable, make the board's rules consistent with DIR rules. *Gov't Code 2054.060(b)* [See 1 Administrative Code Chapter 203 for DIR rules related to management of electronic transactions and signed records.]

"Digital signature" means an electronic identifier intended by the person using it to have the same force and effect as the use of a manual signature. *Gov't Code 2054.060(e)(1)*

Interception of Communications

For information on the unlawful interception, use, or disclosure of communications, see the Electronic Communications Privacy Act (18 USC 2510–2523 [federal wiretap act] and 2701–2713 [Stored Communications Act]) and Penal Code 16.02 (state wiretap law) and 16.04 (Unlawful Access to Stored Communications).

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DISTRICT, CAMPUS, AND CLASSROOM WEBSITES

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**Information Required
on Website**

A district that at any time on or after January 1, 2019, maintained a publicly accessible internet website shall post on a publicly accessible website the following information:

1. The district's contact information, including a mailing address, telephone number, and email address;
2. Each member of the board;
3. The date and location of the next election for board members [see BB series];
4. The requirements and deadline for filing for candidacy of board member, which shall be continuously posted for at least one year before the election day for the office [see BB series];
5. Each notice of a meeting of the board under Government Code Chapter 551, Subchapter C [see BE]; and
6. Each record of a meeting of the board under Government Code 551.021 [see BE].

Items 5 and 6 above do not apply to a district with a population of less than 5,000 in the district's boundaries and located in a county with a population of less than 25,000.

Gov't Code 2051.201

Note: See GBA regarding the confidentiality of certain board member information.

Trustee Information

Each district that maintains an internet website shall post on the website the name, email address, and term of office, including the date the term began and the date the term expires, of each member of the district's board of trustees. If a district does not maintain an internet website, the district shall submit the information required above to the Texas Education Agency (TEA). On receipt of the district's information, TEA shall post the information on TEA's internet website.

Each time there is a change in the membership of a district's board, the district shall update the information required above and, as applicable post the updated information on the district's internet website or submit the updated information to TEA for posting on TEA's internet website.

Education Code 11.1518

Note: The following is an index of website posting requirements that are addressed in the legal reference material of the policy manual. The list is not all-inclusive. The list does not address postings that are required in response to a specific incident or postings required under special circumstances.

**Other Required
Internet Postings**

The following posting requirements apply to a district that maintains an internet website:

1. A board may not vote on adoption of a proposed local innovation plan unless the final version of the proposed plan has been available on the district website for at least 30 days, under Education Code 12A.005(a)(1) and 19 Administrative Code 102.1307(a)(1). [See AF]
2. A district designated as a district of innovation shall ensure that a copy of its current local innovation plan is available to the public by posting and maintaining the plan in a prominent location on the district's website, under Education Code 12A.0071(a) and 19 Administrative Code 102.1305(e), .1307(f). [See AF]
3. Not later than 30 days after an accreditation status of accredited-warned, accredited-probation, or not accredited-revoked is assigned, a district must post notice on the home page of its website with a link to the required notification under 19 Administrative Code 97.1055(f), and maintain this until the district is assigned the accredited status. [See AIA]
4. A district with a local accountability system must produce a campus scorecard and make available on the district website an explanation of the methodology used to assign local accountability performance ratings, under 19 Administrative Code 97.1003(g). [See AIA]
5. A board shall disseminate its Texas Academic Performance Report (TAPR) by posting it on the district website under 19 Administrative Code 61.1022(f). [See AIB]
6. Not later than the tenth day after the first day of instruction of each school year, a district shall make available each campus report card, the district's performance report, the district's accreditation status and performance rating, and a definition and explanation of each accreditation status, under Education Code 39.362. [See AIB]

7. A district shall post its annual federal report card under 20 U.S.C. 6311(h)(2). [See AIB]
8. A district or campus assigned a rating of D that qualifies under Education Code 39.0543(b) must notify the public of the meeting for input for the development of a local improvement plan 15 days prior to the meeting by way of the district and campus website, under 19 Administrative Code 97.1061(b)(3)(A)(ii). [See AIC]
9. A campus intervention team must notify the public of the meeting for input for the development of a targeted improvement plan 15 days prior to the meeting by way of the district and campus website, under 19 Administrative Code 97.1061(e)(3)(A)(ii) and Education Code 39A.056. [See AIC]
10. A district shall post a targeted improvement plan for a campus assigned an unacceptable performance rating on its website before the board hearing on the plan under Education Code 39A.057(b). [See AIC]
11. A district shall notify stakeholders of their ability to review the completed campus turnaround plan and post the completed plan on the district website at least 30 days before the final plan is submitted to the board of trustees, under 19 Administrative Code 97.1064(e). [See AIC]
12. A district shall post an election notice required under Election Code 85.007. [See BBBA]
13. A district shall post election information under Election Code 4.009. [See BBBA]
14. Each day early voting is conducted, the district shall post the branch daily register under Election Code 85.072. [See BBBA]
15. A district shall post early voting rosters under Election Code 87.121. [See BBBA]
16. A district shall post election results under Election Code 65.016. [See BBBB]
17. A district shall post the minutes of the last regular board meeting held before an election of trustees if the minutes reflect that a trustee is deficient in meeting the trustee's training requirement, under Education Code 11.159(b) and 19 Administrative Code 61.1(j). [See BBD]
18. A district that is located wholly or partly in a municipality with a population of more than 500,000 and with a student enroll-

- ment of more than 15,000 shall post a report filed pursuant to Election Code Chapter 254 by a board member, a candidate for membership on the board, or a specific-purpose committee for supporting, opposing, or assisting a candidate or member of a board under Election Code 254.04011. [See BBBC]
19. A district shall provide access to the conflicts disclosure statements and questionnaires under Local Government Code 176.009. [See BBFA, CHE]
 20. A district shall post the statements regarding activities to support and promote student health under Education Code 28.004. [See BDF]
 21. A district must post notice of school health advisory council (SHAC) meetings under Education Code 28.004(d-1). [See BDF]
 22. A district must post the minutes and audio or video recording of each SHAC meeting under Education Code 28.004(d-2). [See BDF]
 23. A board must post notice of a board meeting and, if the district contains all or part of the area within the corporate boundaries of a municipality with a population of 48,000 or more, the board must also post the agenda for a board meeting under Government Code 551.056. [See BE]
 24. A district that has a student enrollment of 10,000 or more shall post the archived recording, or a link thereto, of its meetings under Government Code 551.128(b-1). [See BE]
 25. A district conducting a bond election shall post the election order, the election notice, the contents of the proposition, and any sample ballot under Election Code 4.003(f). [See CCA]
 26. A district conducting a bond election shall post the voter information document beginning not later than the 21st day before election day and ending on the day after the election, under Government Code 1251.052(d). [See CCA]
 27. A district issuing capital appreciation bonds shall post the information required by Government Code 1201.0245. [See CCA]
 28. Not later than 30 days before the date of an election to approve a tax rate, a district must post the results of an efficiency audit under Education Code 11.184. [See CCG]
 29. A district shall include on the home page of its website the prescribed statement if the district increases the amount of

taxes to fund maintenance and operation expenditures under Tax Code 26.05(b). [See CCG]

30. A district shall maintain a link to the area of the comptroller's website where information on each of the district's agreements to limit appraised value, if any, is maintained, under Tax Code 313.0265(c). [See CCGB]
31. A district shall post a summary of its proposed budget concurrently with publication of the proposed budget under Education Code 44.0041. [See CE]
32. In the format prescribed by the comptroller, a district shall post or cause to be posted tax rate and budget information under Tax Code 26.18. [See CE]
33. A district shall maintain its adopted budget on the district's website until the third anniversary of the date the budget was adopted, under Education Code 44.0051. [See CE]
34. A district shall continuously post its contact information and Annual Local Debt Report under Local Government Code 140.008 and 34 Administrative Code 10.1–.6 on its website until the district posts the next annual report, or, as an alternative, the district may continually maintain a link to the comptroller's website where the district's financial information may be viewed. [See CFA]
35. Prior to conducting an active threat exercise, a district must provide adequate notice of the exercise through multiple distribution networks, including the district's website, under 19 Administrative Code 103.1211(b)(1). [See CKB]
36. A district must make available information regarding its compliance with requirements related to the transportation of students enrolled in the district who reside outside the district, under Education Code 34.007. [See CNA]
37. A district that does not participate in the uniform group health insurance program (TRS ActiveCare) shall post its comparability report, together with the policy or contract for the group health coverage plan, under Education Code 22.004(d). [See CRD]
38. A district that is a service provider seeking to limit liability under the Digital Millennium Copyright Act must post information regarding its designated agent under 17 U.S.C. 512(c)(2). [See CY]

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DISTRICT, CAMPUS, AND CLASSROOM WEBSITES

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39. A district shall post its employment policy and any regulations referenced under Education Code 11.1513(a). [See DC]
40. A district shall post the board's employment policies under Education Code 21.204(d). [See DCB]
41. The board shall adopt and post on the district's website early childhood literacy and mathematics plans that set specific annual goals under Education Code 11.185. [See EA]
42. The board shall post on the district's website and on the website, if any, of each campus the annual report of progress toward the goals set under the early childhood literacy and mathematics plans under Education Code 11.185. [See EA]
43. The board shall post on the district's website and on the website, if any, of each campus the annual report of progress toward the goals set under the college, career, and military readiness plans under Education Code 11.186. [See EA]
44. A district shall post curriculum materials used in the district's human sexuality instruction or instruction relating to the prevention of child abuse, family violence, dating violence, and sex trafficking, if the materials are in the public domain, under Education Code 28.004(j). [See EHAA]
45. A district shall post the transition and employment guide for students enrolled in special education programs and their parents in order to provide information on statewide services and programs that assist in the transition to life outside the public school system, under Education Code 29.0112. [See EHBAD]
46. A district shall make available on the district or campus website by November 1 of each school year a family engagement plan to assist the district in achieving and maintaining high levels of family involvement and positive family attitudes toward education, under 19 Administrative Code 102.1003(e). [See EHBG]
47. Annually, a district shall post any agreement between the district and a public institution of higher education to provide a dual credit program, under Education Code 28.009(b-2). [See EHDD]
48. A district shall publish information from TEA under Education Code 28.02121 explaining the advantages of the distinguished level of achievement and each endorsement. [See EIF]

49. A district shall post the date the PSAT/NMSQT will be administered and the date any college advanced placement tests will be administered, under Education Code 29.916. [See EK]
50. A district that receives funds under Title 1, Part A shall post on its website and the website of each campus for each grade served, information on each assessment required by the state to comply with 20 U.S.C. 6311, other assessments required by the state, and assessments required district-wide, under 20 U.S.C. 6312(e)(2)(B). [See EKB]
51. A district shall post information regarding local programs and services, including charitable programs and services, available to assist students who are homeless, under Education Code 33.906. [See FDC]
52. A district shall prominently post information about required and recommended immunizations and procedures for claiming an exemption from immunization requirements under Education Code 38.019. [See FFAB]
53. Each school year, the board shall post a summary of the [Guidelines for the Care of Students with Food Allergies at Risk for Anaphylaxis](#)¹ on the district's website with instructions for obtaining access to the complete guidelines document, under Education Code 38.0151. [See FFAF]
54. A district must prominently display the contact information required to be listed for the Title IX Coordinator and policy on its website, if any, under 34 C.F.R. 106.8(b). [See FFH]
55. A district must make all materials used to train Title IX Coordinators, investigators, decision-makers, and any person who facilitates an informal resolution process publicly available on its website, if any, under 34 C.F.R. 106.45(b)(10)(i)(D). [See FFH]
56. To the extent practicable, a district must post the procedure for reporting bullying established by the district's bullying policy, under Education Code 37.0832(e). [See FFI]
57. A district shall post on its website, for each district campus, the email address and dedicated phone number of the campus behavior coordinator under Education Code 26.015. [See FO]
58. If the board designates a method for making a written request for public information, other than mail, email, or hand-delivery, the board must include a statement that a request may be made by that method on its website under Government Code

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552.234(b) unless the statement is on the sign required by Government Code 552.205. [See GBAA]

59. A board that allows requestors to use the public information request form created by the attorney general must post the form on the district website under Government Code 552.235. [See GBAA]
60. A district shall post on its website and each campus shall post on any campus website a notice regarding the district's ability to refuse entry or eject certain persons under Education Code 37.105 and 19 Administrative Code 103.1207(g), including the appeal process. [See GKA]

Optional Internet Postings

A district that maintains an internet website has the following options:

1. A board may broadcast an open meeting over the internet, under Government Code 551.128. [See BE]
2. A district may publish the superintendent's employment contract on the district's website instead of publishing it in the annual financial management report under 19 Administrative Code 109.1001(q)(3)(B)(i). [See CFA]
3. Notice of a vacant position for which a certificate or license is required may be provided by posting the position on the district's internet website, rather than on a bulletin board, under Education Code 11.1513. [See DC]
4. A district may place on its internet website a current copy of the procedural safeguards notice regarding special education and related services, under 34 C.F.R. 300.504(b). [See EHBAE]
5. A district may provide the annual notice to the parent of each student enrolled in grade 9 or above of the availability of subsidies for certain exam fees and the availability and enrollment qualifications for programs under which a student may earn college credit and career and technology education programs or other work-based education programs in the district, under Education Code 28.010. [See EHDD]
6. A board may post a mailing address and email address designated for receiving written requests for public information on its website under Government Code 552.234(d). [See GBAA]

Geospatial Data Products

"Geospatial data product" means a document, computer file, or internet website that contains geospatial data; a map; or information

about a service involving geospatial data or a map. *Gov't Code 2051.101(1)*

Notice

A district shall include a notice on each geospatial data product that:

1. Is created or hosted by the district;
2. Appears to represent property boundaries; and
3. Was not produced using information from an on-the-ground survey conducted by or under the supervision of a registered professional land surveyor or land surveyor authorized to perform surveys under laws in effect when the survey was conducted.

The notice must be in substantially the following form: "This product is for informational purposes and may not have been prepared for or be suitable for legal, engineering, or surveying purposes. It does not represent an on-the-ground survey and represents only the approximate relative location of property boundaries."

The notice may include language further defining the limits of liability of a geospatial data product producer; apply to a geospatial data product that contains more than one map; or for a notice that applies to a geospatial data product that is or is on an internet website, be included on a separate page that requires the person accessing the website to agree to the terms of the notice before accessing the geospatial data product.

Gov't Code 2051.102

Exemption

A district is not required to include the notice on a geospatial data product that:

1. Does not contain a legal description, a property boundary monument, or the distance and direction of a property line;
2. Is prepared only for use as evidence in a legal proceeding;
3. Is filed with the clerk of any court; or
4. Is filed with the county clerk.

Gov't Code 2051.103

¹ TDSHS Guidelines for the Care of Students with Food Allergies at Risk for Anaphylaxis:

<https://www.dshs.texas.gov/sites/default/files/schoolhealth/pdf/FINAL%20Guidelines%20for%20Food%20Allergies%203.2023.pdf>

INSURANCE AND ANNUITIES MANAGEMENT
UNEMPLOYMENT INSURANCE

CRF
(LOCAL)

**Reasonable
Assurance**

The District shall issue letters of reasonable assurance, as appropriate, to employees in positions requiring less than 12 months of service whose services are anticipated to be needed at the beginning of the following school year. [See DCD and DCE]

FACILITIES CONSTRUCTION
COMPETITIVE BIDDING

CVA
(LOCAL)

Specifications	The Superintendent shall ensure that detailed specifications are prepared for any construction project for which competitive bids are sought.
Bid Process	All bids shall be submitted in sealed envelopes, plainly marked with the name of the bid and the time of the bid opening. Bids shall be opened at the time specified. All interested parties shall be invited to attend the bid opening. Any bid may be withdrawn prior to the scheduled time for opening. Bids received after the specified time shall not be considered.
Bid Acceptance	The District may reject any and all bids.
Safety Record	If the District considers the safety record of bidders in determining to whom to award a contract, the safety record shall be defined as a bidder's OSHA (Occupational Safety and Health Administration) inspection logs for the last three years, a loss analysis from the bidder's insurance carrier, and a loss history covering all lines of insurance coverage carried by the bidder.

FACILITIES CONSTRUCTION
COMPETITIVE SEALED PROPOSALS

CVB
(LOCAL)

Specifications

The Superintendent shall prepare a request for proposals for any construction project for which competitive sealed proposals are sought.

Process

All proposals shall be submitted in sealed envelopes, plainly marked with the name of the proposal and the time of the deadline for submission. Proposals shall be opened at the time specified. All offerors shall be invited to attend the proposal opening. Changes in the content of a proposal, and in prices, may be negotiated after proposals are opened.

Withdrawal and
Late Proposals

Any proposal may be withdrawn prior to the scheduled time for opening. Proposals received after the specified time shall not be considered.

Proposal
Acceptance

The District may reject any and all proposals.

Safety Record

If the safety record of offerors is considered in selecting a proposal, the record shall be defined as an offeror's OSHA (Occupational Safety and Health Administration) inspection logs for the last three years, a loss analysis from the offeror's insurance carrier, and a loss history covering all lines of insurance coverage carried by the offeror.

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**Criminal History
Reviews**

Definitions

“Criminal history clearinghouse” (clearinghouse) means the electronic clearinghouse and subscription service established by the Department of Public Safety (DPS) to provide criminal history record information to persons entitled to receive that information and to provide updates to such information. A person who is the subject of the criminal history record information requested must consent to the release of the information. *Gov’t Code 411.0845(a), (h)*

“Criminal history record information” (CHRI) means information collected about a person by a criminal justice agency that consists of identifiable descriptions and notations of arrests, detentions, indictments, information, and other formal criminal charges and their dispositions. *Gov’t Code 411.082(2)*

“National criminal history record information” (NCHRI) means criminal history record information obtained from DPS under Government Code Chapter 411, Subchapter F, and the Federal Bureau of Investigation (FBI) under Government Code 411.087. *Education Code 22.081(2)*

“Request for CHRI” is the processing and entry of a person’s complete set of fingerprints in DPS’s tenprint database and the comparison of those prints to DPS’s latent print database and if authorized the entry into FBI’s tenprint and comparison to the FBI’s latent print database. *37 TAC 27.172*

Participation in the
Criminal History
Clearinghouse

The purpose of the clearinghouse is to:

1. Provide authorized entities with the Texas and FBI fingerprint-based criminal history results.
2. Provide authorized entities with subscription and notification service to disseminate updated criminal history information.

Districts shall only submit a request for CHRI on a person who has authorized the access of their information.

Districts may subscribe to a person in the clearinghouse, if the entity has the authority to view the record. Entities shall unsubscribe from a person when it no longer has authority to view a record.

Districts shall validate their subscriptions in accordance with DPS policies. “Validation” is a process whereby the subscriber reviews a subscription to determine whether they are still authorized to receive CHRI on that individual and updates the subscription accordingly. Validations are required on a yearly basis.

Districts shall maintain compliance with the FBI Criminal Justice Information Services Security Policy. Districts shall allow DPS and

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the FBI to conduct audits of their clearinghouse accounts to prevent any unauthorized access, use, or dissemination of the information.

37 TAC 27.171, .172(8), .174

Certified Persons	The State Board for Educator Certification (SBEC) shall review the NCHRI of a person who is an applicant for or holder of a certificate and who is employed by or is an applicant for employment by a district. <i>Education Code 22.0831(c)</i>
Noncertified Employees <i>Applicability</i>	This section applies to a person who is not an applicant for or holder of a certificate from SBEC and who, on or after January 1, 2008, is offered employment by: 1. A district; or 2. A shared services arrangement, if the employee's or applicant's duties are or will be performed on school property or at another location where students are regularly present. [For noncertified employees of a district or shared services arrangement hired before January 1, 2008, see All Other Employees, below.]
<i>Information to DPS and TEA</i>	Before or immediately after employing or securing the services of a person subject to this section, a district shall send or ensure that the person sends to DPS information that DPS requires for obtaining NCHRI, which may include fingerprints and photographs. A district shall provide the Texas Education Agency (TEA) with the name of a person to whom this section applies. TEA shall examine the CHRI of the person and notify the district if the person may not be hired or must be discharged under Education Code 22.085.
<i>Employment Pending Review</i>	After the required information is submitted, the person may begin employment, but that employment is conditional upon the review of that person's CHRI by TEA and must be terminated if TEA makes a determination that the employee or applicant is ineligible for employment.
<i>Criminal History</i>	A district shall obtain all CHRI that relates to a person subject to this section through the clearinghouse and shall subscribe to the CHRI of that person. A district may require the person to pay any fees related to obtaining the CHRI. <i>Education Code 22.0833; 19 TAC 153.1109(d)</i>
<i>Districts of Innovation</i>	A prohibition, restriction, or requirement imposed by Education Code Chapter 22, Subchapter C (Criminal History Records) on an

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open-enrollment charter school applies to the same extent to a district of innovation or other charter entity.

The failure of a district of innovation to provide information required under Education Code 22.0832 may result in termination of the district's designation as a district of innovation. [See AF]

Education Code 22.0815

Substitute Teachers	This section applies to a person who is a substitute teacher for a district or shared services arrangement.
<i>Applicability</i>	For purposes of the CHRI review requirements, a "substitute teacher" is a teacher who is on call or on a list of approved substitutes to replace a regular teacher and has no regular or guaranteed hours. A substitute teacher may be certified or noncertified.
<i>Information to DPS and TEA</i>	A district shall send or ensure that a person to whom this section applies sends to DPS information required for obtaining NCHRI, which may include fingerprints and photographs. A district shall provide TEA with the name of a person to whom this section applies. TEA shall examine the CHRI and certification records of the person and notify the district if the person: 1. May not be hired or must be discharged as provided by Education Code 22.085; or 2. May not be employed as a substitute teacher because the person's educator certification has been revoked or is suspended.
<i>Employment Pending Review</i>	After the required information is submitted, the person may begin employment, but that employment is conditional upon the review of that person's CHRI by TEA and must be terminated if TEA makes a determination that the employee or applicant is ineligible for employment.
<i>Criminal History</i>	A district shall obtain all CHRI that relates to a person to whom this section applies through the clearinghouse. A district may require the person to pay any fees related to obtaining the CHRI. <i>Education Code 22.0836; 19 TAC 153.1101(5), .1111(d)</i>
Student Teachers	This section applies to a person participating in an internship consisting of student teaching to receive a teaching certificate.
<i>Applicability</i>	
<i>Criminal History</i>	A student teacher may not perform any student teaching until: 1. The student teacher has provided to a district a driver's license or another form of identification containing the person's

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photograph issued by an entity of the United States government; and

2. The district has obtained from DPS all CHRI that relates to a student teacher. A district may also obtain CHRI relating to a student teacher from any other law enforcement agency, criminal justice agency, or private consumer reporting agency. A district may require a student teacher to pay any costs related to obtaining the CHRI.

Education Code 22.0835

Coordination of
Efforts

TEA, SBEC, a district, and a shared services arrangement may coordinate as necessary to ensure that criminal history reviews authorized or required under Education Code Chapter 22, Subchapter C are not unnecessarily duplicated. *Education Code 22.0833(h)*

All Other
Employees

A district shall obtain CHRI that relates to a person who is not subject to an NCHRI review under Education Code Chapter 21, Subchapter C and who is an employee of:

1. The district; or
2. A shared services arrangement, if the employee's duties are performed on school property or at another location where students are regularly present.

A district may obtain the CHRI from:

1. DPS;
2. A law enforcement or criminal justice agency; or
3. A private consumer reporting agency [see Consumer Credit Reports, below].

Education Code 22.083(a), (a-1); Gov't Code 411.097

Note: For criminal history record provisions regarding volunteers, see GKG. For provisions on employees of entities that contract with a district, see CJA.

Confidentiality of
Record

CHRI that a district obtains from DPS, including any identification information that could reveal the identity of a person about whom CHRI is requested and information that directly or indirectly indicates or implies involvement of a person in the criminal justice system:

1. Is for the exclusive use of the district; and

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2. May be disclosed or used by the district only if, and only to the extent, disclosure is authorized or directed by a statute, rule, or order of a court of competent jurisdiction.

For purposes of these confidentiality provisions, "criminal history record" information does not refer to any specific document provided by DPS, but to the information contained, wholly or partly, in a document's original form or any subsequent form or use.

A district or an individual may not confirm the existence or nonexistence of CHRI to any person who is not eligible to receive the information.

Gov't Code 411.084

CHRI obtained by a district, in the original form or any subsequent form, may not be released to any person except the individual who is the subject of the information, TEA, or SBEC, or by court order. The CHRI is not subject to disclosure under Government Code Chapter 552 (Public Information Act).

An employee of a district may request from the district a copy of any CHRI related to that employee that the district has obtained from DPS. The district may charge a fee to provide the information, not to exceed the actual cost of copying the CHRI.

Gov't Code 411.097(d), (f)

Destruction of CHRI A district shall destroy CHRI obtained from DPS on the earlier of:

1. The date the information is used for the authorized purpose; or
2. The first anniversary of the date the information was originally obtained.

Gov't Code 411.097(d)(3)

Confidentiality of
Information
Obtained from
Applicant or
Employee

A district may not release information collected about a person in order to obtain CHRI, including the person's name, address, phone number, social security number, driver's license number, other identification number, and fingerprint records, except:

1. To comply with Government Code Chapter 22, Subchapter C (criminal records);
2. By court order; or
3. With the consent of the person who is the subject of the information.

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In addition, the information is not subject to disclosure under Government Code Chapter 552.

The district shall destroy the information not later than the first anniversary of the date the information is received.

Education Code 22.08391

Unauthorized
Disclosure of CHRI

A person commits a Class B misdemeanor if the person knowingly or intentionally:

1. Obtains CHRI in an unauthorized manner, uses the information for an unauthorized purpose, or discloses the information to a person who is not entitled to the information; or
2. Violates a DPS rule adopted under Government Code Chapter 411, Subchapter F.

A person commits a second degree felony if the person:

1. Obtains, uses, or discloses CHRI for remuneration or for the promise of remuneration; or
2. Employs another person to obtain, use, or disclose CHRI for remuneration or for the promise of remuneration.

Gov't Code 411.085

Refusal to Hire
Convicted
Applicants

A district shall discharge or refuse to hire an employee or applicant for employment if the district obtains information through a CHRI review that the employee or applicant has been:

1. Convicted of or placed on deferred adjudication community supervision for an offense requiring registration as a sex offender under Code of Criminal Procedure Chapter 62; or
2. Convicted of:
 - a. A felony under Title 5, Penal Code, if the victim of the offense was under 18 years of age at the time the offense was committed; or
 - b. An offense under the laws of another state or federal law that is equivalent to an offense under item 1 or 2a, above.

Exception

However, a district is not required to refuse to hire an applicant if the person committed an offense under Title 5, Penal Code and:

1. The date of the offense is more than 30 years before the date the person's employment will begin; and

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2. The applicant for employment satisfied all terms of the court order entered on conviction.

Certification to
Commissioner

Each school year, the superintendent shall certify to the commissioner that the district has complied with the above provisions.

Sanctions

SBEC may impose a sanction on an educator who does not refuse to hire an applicant for employment if the educator knew that the applicant had been adjudicated for or convicted of having an inappropriate relationship with a minor in accordance with Education Code 21.009(e), or knew or should have known, through a CHRI review, that the applicant has been convicted of or placed on deferred adjudication community supervision for an offense described above.

SBEC may impose a sanction on a superintendent who falsely or inaccurately certified to the commissioner that the district had complied with Education Code 22.085. [See Certification to Commissioner, above]

Termination for
Failure to Disclose

A district may discharge an employee if the district obtains information of the employee's conviction of a felony or misdemeanor involving moral turpitude that the employee did not disclose to SBEC or to the district. An employee so discharged is considered to have been discharged for misconduct for the purposes of Labor Code 207.044 (unemployment compensation).

Education Code 22.085; 19 TAC 249.15(b)(12), (14) [See DF]

**Pre-employment
Affidavit**

An applicant for a certified or licensed position [see Professional Personnel at DBA(LEGAL)] with a school district, including a district of innovation, must submit, using a form adopted by TEA, a pre-employment affidavit disclosing whether the applicant has ever been charged with, adjudicated for, or convicted of having an inappropriate relationship with a minor.

An applicant who answers affirmatively concerning an inappropriate relationship with a minor must disclose in the affidavit all relevant facts pertaining to the charge, adjudication, or conviction, including, for a charge, whether the charge was determined to be true or false.

An applicant is not precluded from being employed based on a disclosed charge if the district determines based on the information disclosed in the affidavit that the charge was false.

A determination that an employee failed to disclose required information is grounds for termination of employment.

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SBEC may revoke the certificate of an administrator if the board determines it is reasonable to believe that the administrator employed an applicant for a position described by Education Code 21.003(a) or (b) despite being aware that the applicant had been adjudicated for or convicted of having an inappropriate relationship with a minor.

Education Code 21.009

Do Not Hire Registry

TEA shall develop and maintain an internet portal through which required reports may be confidentially and securely filed and TEA makes available:

1. The registry of persons who are not eligible to be employed in public schools; and
2. Information indicating that a person is under investigation.

Education Code 22.095

TEA shall maintain and make available through its internet portal a registry of persons who are not eligible to be employed by a district, district of innovation, open-enrollment charter school, other charter entity, regional education service center, or shared services arrangement.

A district, district of innovation, open-enrollment charter school, other charter entity, regional education service center, or shared services arrangement shall discharge or refuse to hire a person listed on the registry.

The registry must list:

1. An employee of an open enrollment charter school determined by TEA under Education Code 22.0832 as a person who would not be eligible for educator certification based on their NCHRI;
2. A noncertified person determined by TEA to be not eligible for employment based on the person's CHRI, as provided by Education Code 22.0833 [see DBAA];
3. A person who is not eligible for employment based on CHRI received by TEA under Education Code 21.058(b) indicating that a certified employee is required to register as a sex offender;
4. A person whose certification or permit is revoked by SBEC on a finding that the person engaged in misconduct described by Education Code 21.006(b)(2)(A) or (A-1) [see DHB]; and

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5. A noncertified person who is determined by the commissioner under Education Code 22.094 to have engaged in misconduct described by Education Code 22.093(c)(1)(A) or (B) [see DHC].

Education Code 22.092

**Commercial Driver
License Drug and
Alcohol
Clearinghouse**

The U.S. Department of Transportation (DOT) operates and maintains a national clearinghouse for records relating to alcohol and controlled substances testing of commercial motor vehicle operators in order to improve compliance with DOT's alcohol and controlled substances testing program applicable to commercial motor vehicle operators [see DHE] and to enhance the safety of roadways by reducing accidents and injuries involving the misuse of alcohol or use of controlled substances by operators of commercial motor vehicles. *49 U.S.C. 31306a*

Pre-employment
Query Required

A district must not employ a driver subject to controlled substances and alcohol testing under 49 C.F.R. Part 382 to perform a safety-sensitive function without first conducting a pre-employment query of the federal Drug and Alcohol Clearinghouse to obtain information about the driver's previous test results.

Annual Query
Required

A district must conduct a query of the federal Drug and Alcohol Clearinghouse at least once per year for information for all employees subject to controlled substance and alcohol testing under 49 C.F.R. Part 382 to determine whether information exists about those employees.

Prohibition

A district may not allow a driver the district employs or intends to hire or use to perform any safety-sensitive function if the results of a Clearinghouse query demonstrate that the driver has a prohibited test result.

Recordkeeping
Required

A district must retain for three years a record of each query and all information received in response to each query made under this section.

49 C.F.R. 382.701

**Consumer Credit
Reports**

Definitions

"Adverse action" includes a denial of employment or any other decision for employment purposes that adversely affects any current or prospective employee.

"Consumer report" includes any information from a consumer reporting agency that is used or expected to be used as a factor in establishing the person's eligibility for employment.

"Consumer reporting agency" is an agency that, for monetary fees, dues, or on a cooperative nonprofit basis, regularly assembles or

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evaluates consumer credit information or other information on consumers for the purpose of furnishing consumer reports to third parties.

“Employment purposes” when used in connection with a consumer report means a report used for the purpose of evaluating a person for employment, promotion, reassignment, or retention as an employee.

15 U.S.C. 1681a

Obtaining Reports

A district may not procure a consumer report for employment purposes unless:

1. The district has provided the applicant or employee a written disclosure that a consumer report may be obtained for employment purposes; and
2. The applicant or employee has authorized in writing the procurement of the consumer report.

Adverse Action

Before taking any adverse action based on the consumer report, a district shall provide the applicant or employee a copy of the consumer report and a written description of the person’s rights under the Fair Credit Reporting Act, as prescribed by the Federal Trade Commission.

15 U.S.C. 1681b(b)(2)

Disposal of Records

A district must properly dispose of a consumer report by taking reasonable measures to protect against unauthorized access to or use of the information.

“Dispose” includes discarding or abandoning the consumer report, or selling, donating, or transferring any medium, including computer equipment, upon which the consumer report is stored.

Examples of reasonable measures include:

1. Burning, pulverizing, or shredding papers containing a consumer report so the information cannot practicably be read or reconstructed;
2. Destroying or erasing electronic media containing a consumer report so that the information cannot practicably be read or reconstructed; or
3. After due diligence, entering into and monitoring compliance with a contract with another party engaged in the business of record destruction to dispose of the consumer report.

16 C.F.R. 682.3

COMPENSATION AND BENEFITS
COMPENSATION PLAN

DEA
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The Superintendent shall recommend an annual compensation plan for all District employees. The compensation plan may include wage and salary structures, stipends, benefits, and incentives. [See also DEAA] The recommended plan shall support District goals for hiring and retaining highly qualified employees. The Board shall review and approve the compensation plan to be used by the District. The Board shall also determine the total compensation package for the Superintendent. [See BJ series]

Pay Administration

The Superintendent shall implement the compensation plan and establish procedures for plan administration consistent with the budget. The classification of each job title within the compensation plan shall be based on the qualifications, duties, and market value of the position.

Annualized Salary

The District shall pay all salaried employees over 12 months in equal monthly or semi-monthly installments, regardless of the number of months employed during the school year. Salaried employees hired during the school year shall be paid in accordance with administrative regulations.

Pay Increases

The Superintendent shall recommend to the Board an amount for employee pay increases as part of the annual budget. Any pay adjustments for individual employees shall be determined within the approved budget following established procedures.

***Midyear Pay
Increases***

**Contract
Employees**

A contract employee's pay may be increased after performance on the contract has begun only if authorized by the compensation plan of the District or there is a change in the employee's job assignment or duties during the term of the contract that warrants additional compensation. Any such changes in pay that do not conform with the compensation plan shall require Board approval. [See DEA(LEGAL) for provisions on pay increases and public hearing requirements.]

**Noncontract
Employees**

The Superintendent may grant a pay increase to a noncontract employee after duties have begun because of a change in the employee's job assignment or to address pay equity. The Superintendent shall report any such pay increases to the Board at the next regular meeting.

Pay During Closing

If the Board chooses to pay employees during an emergency closure for which the workdays are not scheduled to be made up at a later date, then that authorization shall be by resolution or other Board action and shall reflect the purpose served by the expenditure. [See EB for the authority to close schools.]

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Fair Labor Standards Act

Minimum Wage and Overtime

Unless an exemption applies, a district shall pay each of its employees not less than minimum wage for all hours worked. 29 U.S.C. 206(a)(1)

Unless an exemption applies, a district shall pay an employee not less than one and one-half times the employee's regular rate of pay for all hours worked in excess of 40 in any workweek. 29 U.S.C. 207(a)(1); 29 C.F.R. pt. 778

Breaks for Nonexempt Employees

Rest periods of up to 20 minutes must be counted as hours worked. Coffee breaks or time for snacks are rest periods, not meal periods. 29 C.F.R. 785.18

Bona fide meal periods of 30 minutes or more are not counted as hours worked if the employee is completely relieved from duty. The employee is not relieved from duty if the employee is required to perform any duties, whether active or inactive, while eating. For example, an office employee who is required to eat at his or her desk is working while eating. It is not necessary that an employee be permitted to leave the premises if the employee is otherwise completely freed from duties during the meal period. 29 C.F.R. 785.19

Compensatory Time
Accrual

Nonexempt employees may receive, in lieu of overtime compensation, compensatory time off at a rate of not less than one and one-half hours for each hour of overtime work, pursuant to an agreement or understanding arrived at between the employer and employee before the performance of the work. Such agreement or understanding may be informal, such as when an employee works overtime knowing that the employer rewards overtime with compensatory time.

An employee may accrue not more than 240 hours of compensatory time. If the employee's overtime work included a public safety activity, an emergency response activity, or a seasonal activity, the employee may accrue not more than 480 hours of compensatory time. After the employee has reached these limits, the employee shall be paid overtime compensation for additional overtime work.

Payment for Accrued Time

Compensation paid to an employee for accrued compensatory time shall be paid at the regular rate earned by the employee at the time of payment. An employee who has accrued compensatory time off shall be paid for any unused compensatory time upon separation from employment at the rates set forth at 29 U.S.C. 207(o)(4).

Use

An employee who has requested the use of compensatory time shall be permitted to use such time within a reasonable period after making the request if the use of the compensatory time does not unduly disrupt the operations of the district.

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The Fair Labor Standards Act (FLSA) does not prohibit a district from compelling the use of accrued compensatory time.

29 U.S.C. 207(o); Christensen v. Harris Cnty., 529 U.S. 576 (2000); Houston Police Officers' Union v. City of Houston, 330 F.3d 298 (5th Cir. 2003)

Exempt Employees

The minimum wage and overtime provisions do not apply to any employee employed in a bona fide executive, administrative, or professional capacity. *29 U.S.C. 213(a)(1)*

*Academic
Administrators*

The term "employee employed in a bona fide administrative capacity" includes an employee:

1. Compensated on a salary or fee basis at a rate of not less than \$684 per week, exclusive of board, lodging, or other facilities; or on a salary basis which is at least equal to the entrance salary for teachers in the district by which employed; and
2. Whose primary duty is performing administrative functions directly related to academic instruction or training in a district or department or subdivision thereof.

"Performing administrative functions directly related to academic instruction or training" means work related to the academic operations and functions in a school rather than to administration along the lines of general business operations. Such academic administrative functions include operations directly in the field of education. Jobs relating to areas outside the educational field are not within the definition of academic administration.

Employees engaged in academic administrative functions include:

1. The superintendent or other head of an elementary or secondary school system, and any assistants, responsible for administration of such matters as curriculum, quality and methods of instructing, measuring and testing the learning potential and achievement of students, establishing and maintaining academic and grading standards, and other aspects of the teaching program;
2. The principal and any vice principals responsible for the operation of an elementary or secondary school;
3. Academic counselors who perform work such as administering school testing programs, assisting students with academic problems and advising students concerning degree requirements; and
4. Other employees with similar responsibilities.

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Jobs relating to building management and maintenance, jobs relating to the health of the students, and academic staff such as social workers, psychologists, lunchroom managers, or dietitians do not perform academic administrative functions, although such employees may qualify for another exemption.

29 C.F.R. 541.204

Salary Basis

To qualify as an exempt executive, administrative, or professional employee, the employee must be compensated on a salary basis, unless the employee is a teacher. Subject to the exceptions listed in the rule, an employee must receive the full salary for any week in which the employee performs any work, without regard to the number of days or hours worked. A district that makes improper deductions from salary shall lose the exemption if the facts demonstrate that the district did not intend to pay exempt employees on a salary basis. *29 C.F.R. 541.600, .602(a), .603*

*Partial-Day
Deductions*

A district employee who otherwise meets the salary basis requirements shall not be disqualified from exemption on the basis that the employee is paid according to a pay system established by statute, ordinance, or regulation, or by a policy or practice established pursuant to principles of public accountability, under which the employee accrues personal leave and sick leave and which requires the employee's pay to be reduced or the employee to be placed on leave without pay for absences for personal reasons or because of illness or injury of less than one workday when accrued leave is not used by an employee because:

1. Permission for its use has not been sought or has been sought and denied;
2. Accrued leave has been exhausted; or
3. The employee chooses to use leave without pay.

Deductions from the pay of a district employee for absences due to a budget-required furlough shall not disqualify the employee from being paid on a salary basis except in the workweek in which the furlough occurs and for which the employee's pay is accordingly reduced.

29 C.F.R. 541.710

*Safe Harbor
Policy*

If a district has a clearly communicated policy that prohibits improper pay deductions and includes a complaint mechanism, reimburses employees for any improper deductions, and makes a good faith commitment to comply in the future, the district will not lose the exemption unless the district willfully violates the policy by con-

tinuing to make improper deductions after receiving employee complaints.

The best evidence of a clearly communicated policy is a written policy that was distributed to employees before the improper pay deductions by, for example, providing a copy of the policy to employees upon hire, publishing the policy in an employee handbook, or publishing the policy on a district's intranet.

29 C.F.R. 541.603(d)

Teachers

The term "employee employed in a bona fide professional capacity" includes any employee with a primary duty of teaching, tutoring, instructing, or lecturing in the activity of imparting knowledge and who is employed and engaged in this activity as a teacher in an elementary or secondary school system by which the employee is employed. The salary basis requirements do not apply to teaching professionals.

Exempt teachers include:

1. Regular academic teachers;
2. Teachers of kindergarten or nursery school pupils;
3. Teachers of gifted or disabled children;
4. Teachers of skilled and semi-skilled trades and occupations;
5. Teachers engaged in automobile driving instruction;
6. Home economics teachers; and
7. Vocal or instrumental music instructors.

Those faculty members who are engaged as teachers but also spend a considerable amount of their time in extracurricular activities such as coaching athletic teams or acting as moderators or advisors in such areas as drama, speech, debate, or journalism are engaged in teaching. Such activities are a recognized part of the schools' responsibility in contributing to the educational development of the student.

The possession of an elementary or secondary teacher's certificate provides a clear means of identifying the individuals contemplated as being within the scope of the exemption for teaching professionals. Teachers who possess a teaching certificate qualify for the exemption regardless of the terminology (e.g., permanent, conditional, standard, provisional, temporary, emergency, or unlimited) used by the state to refer to different kinds of certificates. However, a teacher who is not certified may be considered for

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exemption, provided that such individual is employed as a teacher by the employing school or school system.

29 C.F.R. 541.303

Wage and Hour
Records

A district shall maintain and preserve payroll or other records for nonexempt employees containing the information required by the regulations under the FLSA. *29 C.F.R. 516.2(a)*

**Payday Law
Exemption**

The Texas Payday Law does not apply to the state or a political subdivision. *Labor Code 61.003*

Please Note: This manual does not have policies in all codes. The coding structure is common to all TASB manuals and is designed to accommodate expansion of both (LEGAL) and (LOCAL) policy topics and administrative regulations.

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School Library

A district possesses significant discretion to determine the content of its school libraries. A district must, however, exercise its discretion in a manner consistent with the First Amendment.

**Removal of Library
Materials**

Students' First Amendment rights are implicated by the removal of books from the shelves of a school library. A district shall not remove materials from a library for the purpose of denying students access to ideas with which the district disagrees. A district may remove materials because they are pervasively vulgar or based solely upon the educational suitability of the books in question.

Bd. of Educ. v. Pico, 457 U.S. 853 (1982)

**Instructional
Materials**

Instructional materials selected for use in the public schools shall be furnished without cost to students attending those schools. Except as provided by Education Code 31.104(d), a district may not charge a student for instructional material or technological equipment purchased by the district with the district's technology and instructional materials allotment [see CMD]. *Education Code 31.001*

Parental Access

A parent is entitled to:

1. Review all teaching materials, instructional materials, including while the child is participating in virtual or remote learning, and other teaching aids used in the classroom of the parent's child;
2. Review each test administered to the child after the test is administered; and
3. Observe virtual instruction while the parent's child is participating in virtual or remote learning to the same extent the parent would be entitled to observe in-person instruction of the child.

A district shall make teaching materials and tests readily available for parental review and may specify reasonable hours for such review.

***Taking Home
Materials***

A student's parent is entitled to request that a district allow the student to take home any instructional materials used by the student. Subject to the availability of the instructional materials, a district or school shall honor the request. A student who takes home instructional materials must return the instructional materials to school at the beginning of the next school day if requested to do so by the student's teacher.

***Students Without
Reliable Access
to Technology***

A district must provide the instructional materials to the student in printed format if the student does not have reliable access to technology at the student's home. This requirement does not require a

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district to purchase printed copies of instructional materials that the district would not otherwise purchase. A district may comply with this requirement by providing the student a printout of the relevant electronic instructional materials.

*Learning
Management
System or Online
Portal*

A district that uses a learning management system or any online learning portal to assign, distribute, present, or make available instructional materials as defined by Education Code 31.002 [see EFA] to students shall provide login credentials to the system or portal to each student's parent.

Education Code 26.006

Harmful Materials

"Harmful material" means material whose dominant theme taken as a whole:

1. Appeals to the prurient interest of a minor, in sex, nudity, or excretion;
2. Is patently offensive to prevailing standards in the adult community as a whole with respect to what is suitable for minors; and
3. Is utterly without redeeming social value for minors.

Penal Code 43.24(a)

Obscene

"Obscene" means material or a performance:

1. The average person, applying contemporary community standards, would find that taken as a whole appeals to the prurient interest in sex;
2. Depicts or describes
 - a. Patently offensive representations or descriptions of ultimate sexual acts, normal or perverted, actual or simulated, including sexual intercourse, sodomy, and sexual bestiality; or
 - b. Patently offensive representations or descriptions of masturbation, excretory functions, sadism, masochism, lewd exhibition of the genitals, the male or female genitals in a state of sexual stimulation or arousal, covered male genitals in a discernibly turgid state or a device designed and marketed as useful primarily for stimulation of the human genital organs; and
3. Taken as a whole, lacks serious literary, artistic, political, and scientific value.

Penal Code 43.21(1)

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**Information
Collection and
Access**

U.S. ED–Funded
Surveys (PPRA)

*Consent
Required*

Under the Protection of Pupil Rights Amendment (PPRA), no student shall be required, as part of any program funded in whole or in part by the U.S. Department of Education (ED), to submit to a survey, analysis, or evaluation that reveals information concerning the topics listed at Protected Information, below, without the prior consent of the student (if the student is an adult or emancipated minor), or, in the case of an unemancipated minor, without the prior written consent of the parent. *20 U.S.C. 1232h(b)*

*Parental
Inspection*

All instructional materials, including teacher's manuals, films, tapes, or other supplementary material, that will be used in connection with any survey, analysis, or evaluation as part of any program funded in whole or in part by the U.S. ED shall be available for inspection by the parents or guardians of the children. *20 U.S.C. 1232h(a)*

Information
Collection Funded
by Other Sources

Policies

Except as provided by 20 U.S.C. 1232h(a) or (b) [see U.S. ED Funded Surveys, above], as a condition of receiving funds for a program funded in whole or in part by the U.S. ED, a district shall develop and adopt policies, in consultation with parents, pursuant to 20 U.S.C. 1232h(c)(1), regarding the following:

1. The parent's right to inspect a survey created by a third party before the survey is administered or distributed by a school to the student and any applicable procedures for granting a request by a parent for reasonable access to such survey within a reasonable period of time after the request is received.
2. A district's arrangements to protect student privacy in the event a survey containing one or more of the items listed under Protected Information, below, is administered or distributed to a student.
3. The parent's right to inspect any instructional material used in the educational curriculum for the student and any applicable procedures for granting a request by a parent for reasonable access to instructional material within a reasonable period of time after the request is received.
4. The administration of physical examinations or screenings that a district may administer to the student.
5. The collection, disclosure, or use of personal information collected from students for the purpose of marketing or selling that information. This provision does not apply to use of personal information collected from students for the exclusive purpose of developing, evaluating, or providing educational products or services for or to students or educational institutions, such as recruiters, book clubs, curriculum and instruc-

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tional materials used by schools, sale by students of products or services to raise funds for school-related or education-related activities, or student recognition programs.

6. The parent's right to inspect any instrument used in collection of personal information in item 5 above, before the instrument is administered and any applicable procedures for granting a request by a parent for reasonable access to such instrument within a reasonable period of time after the request is received.

A district need not develop and adopt new policies if TEA or the district had in place, on January 8, 2002, policies covering the requirements of 20 U.S.C. 1232h(c)(1). [See CRD, FFAA, FL, and FNG]

*Parental
Notification*

A district shall provide for reasonable notice of the adoption or continued use of such policies directly to the parents of the students enrolled in schools served by the district. At a minimum, a district shall:

1. Provide notice at least annually, at the beginning of the school year and within a reasonable time after any substantive change in the policies; and
2. Offer an opportunity for the parent to opt the student out of participation in an activity described below.

A district shall directly notify the parent of a student, at least annually at the beginning of the school year, of the specific or approximate dates during the school year when activities, described below, are scheduled or expected to be scheduled. The following activities require notification under this section:

1. Activities involving the collection, disclosure, or use of personal information collected from students for the purpose of marketing or for selling that information.
2. The administration of any survey containing one or more items described at Protected Information, below.
3. Any nonemergency, invasive physical examination or screening that is required as a condition of attendance, administered and scheduled by the school in advance, and not necessary to protect the immediate health and safety of the student or of other students.

20 U.S.C. 1232h(c)(1)–(4) [See FFAA]

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Protected
Information

Protected information addressed by 20 U.S.C. 1232h includes:

1. Political affiliations or beliefs of the student or the student's parents.
2. Mental and psychological problems of the student or the student's family.
3. Sex behavior and attitudes.
4. Illegal, anti-social, self-incriminating, and demeaning behavior.
5. Critical appraisals of other individuals with whom respondents have close family relationships.
6. Legally recognized privileged or analogous relationships, such as those of lawyers, physicians, and ministers.
7. Religious practices, affiliations, or beliefs of the student or student's parent.
8. Income (other than that required by law to determine eligibility for participation in a program or for receiving financial assistance under such program).

20 U.S.C. 1232h(b), (c)(1)(B)

"Personal
Information"
Defined

The term "personal information" means individually identifiable information, including a student's:

1. First and last name;
2. Home or physical address, including street name and city or town;
3. Telephone number; or
4. Social security identification number.

20 U.S.C. 1232h(c)(6)(E)

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Driver Education

A school district shall consider offering a driver education and traffic safety course during each school year. If the district offers the course, the district may:

1. Conduct the course and charge a fee for the course in the amount determined by the Texas Education Agency (TEA) to be comparable to the fee charged by a driver education provider that holds a license under Education Code Chapter 1001; or
2. Contract with a driver education provider that holds a license under Education Code Chapter 1001 to conduct the course.

Education Code 29.902(c)

[For more information regarding driver education safety program requirements, see 16 Administrative Code Chapter 84.]

Life Skills Programs

A district may provide an integrated program of educational and support services for students who are pregnant or who are parents. If a district provides such a program, the program shall include all of the following:

1. Individual counseling, peer counseling, and self-help programs.
2. Career counseling and job readiness training.
3. Day care for the students' children on the campus or at a day care facility in close proximity to the campus.
4. Transportation for children of students to and from the campus or day care facility.
5. Transportation for students, as appropriate, to and from the campus or day care facility.
6. Instruction related to knowledge and skills in child development, parenting, and home and family living.
7. Assistance to students in the program in obtaining available services from government agencies or community service organizations, including prenatal and postnatal health and nutrition programs.

A district shall solicit recommendations for obtaining community support for the students and their children in the life skills programs.

**School-Based
Savings Program**

A district may operate a shared services arrangement program to operate a life skills program for student parents.

Education Code 29.085 [See EHBC and FNE]

A district may establish a school-based savings program to facilitate increased awareness of the importance of saving for higher education and facilitate personal financial literacy instruction. A district may offer the program in conjunction with a personal financial literacy course under Education Code 28.0021 [see EHAC].

A school-based savings program may, through partnerships with appropriate institutions, promote:

1. General savings, by offering savings accounts or certificates of deposit through partner financial institutions; or
2. Savings dedicated for higher education, by offering through partner institutions the following accounts or bonds the primary purpose of which must be to pay expenses associated with higher education:
 - a. An account authorized under Section 529, Internal Revenue Code of 1986;
 - b. A Coverdell education savings account established under 26 U.S.C. Section 530;
 - c. A certificate of deposit;
 - d. A savings account; and
 - e. A Series I savings bond.

A district establishing a program:

1. Shall seek to establish partnerships with appropriate institutions that are able to offer an account or bond above; and
2. May seek to establish partnerships with public sector partners, private businesses, nonprofit organizations, and philanthropic organizations in the community.

A partnership established between a district and:

1. An appropriate institution may allow a student in the program or the student and an adult in the student's family jointly to have an opportunity to establish an account or purchase a bond; and
2. An appropriate institution, public sector partner, private business, or nonprofit or philanthropic organization may provide:

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- a. A structure for the management of the program; and
- b. Incentives that encourage contribution to a school-based account or purchase of a bond, including incentives that provide matching funds or seed funding.

Education Code 28.0024

Local Credit Courses

A district may offer courses for local credit in addition to those in the required curriculum. The State Board of Education shall:

1. Be flexible in approving a course for credit for high school graduation; and
2. Approve courses in cybersecurity for credit for high school graduation.

Education Code 28.002(f) [See EIF]

Apprenticeships

A district may offer a course or other activity, including an apprenticeship or training hours needed to obtain an industry-recognized credential or certificate, that is approved by the board for credit without obtaining State Board of Education approval if the district meets the requirements in Education Code 28.002(g-1) and (g-2).

A district shall annually report to TEA the names of the locally developed courses, programs, institutions of higher education, and internships in which the district's students have enrolled under this section. TEA shall make information provided under this section available to other districts.

Education Code 28.002(g-1)–(g-2); 19 TAC 74.11(n)

Cybersecurity

A district may offer a course in cybersecurity that is approved by the board for credit without obtaining State Board of Education approval if the district partners with a public or private institution of higher education that offers an undergraduate degree program in cybersecurity to develop and provide the course. *Education Code 28.002(g-3)*

A district shall annually report to TEA the names of cybersecurity courses approved by the board for credit and institutions of higher education in which the district's students have enrolled as authorized above. TEA shall make information provided under this section available to other districts. *19 TAC 74.11(o)*

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**Admission, Review,
and Dismissal
Committee**

Each district must establish an admission, review, and dismissal (ARD) committee for each eligible student with a disability and for each student for whom a full individual and initial evaluation is conducted. The ARD committee is the individualized education program (IEP) team defined in federal law and regulations, including 34 C.F.R. 300.321.

The district is responsible for all of the functions for which the IEP team is responsible under federal law and regulations and for which the ARD committee is responsible under state law, including the responsibilities listed at 19 Administrative Code 89.1050.

19 TAC 89.1050(a); 34 C.F.R. 300.116(a), .321(a)

**Committee
Members**

A district shall ensure that each ARD committee meeting includes all of the following:

1. The parents of a student with a disability;
2. At least one regular education teacher of the student (if the student is, or may be, participating in the regular education environment);
3. At least one special education teacher or, if appropriate, at least one special education provider of the student;
4. A representative of the district who:
 - a. Is qualified to provide or supervise the provision of specially designed instruction to meet the unique needs of students with disabilities;
 - b. Is knowledgeable about the general education curriculum; and
 - c. Is knowledgeable about the availability of resources of the district;
5. Other individuals who have knowledge or special expertise regarding the student at the discretion of the district or the parent;
6. An individual who can interpret the instructional implications of evaluation results, who may be a member of the ARD committee described in items 2–5;
7. The student, if appropriate;
8. For a student who is suspected to be deaf or hard of hearing, a teacher who is certified in the education of students who are deaf or hard of hearing;

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9. For a student with a suspected or documented visual impairment, a teacher who is certified in the education of students with visual impairments;
10. For a student with suspected or documented deaf-blindness, a teacher who is certified in the education of students with visual impairments and a teacher who is certified in the education of students who are deaf or hard of hearing;
11. For a student with limited English proficiency, a member of the language-proficiency assessment committee (LPAC), who may also be a member as described at items 2 or 3;
12. A representative of any participating agency likely to be responsible for providing transition services for a student, as appropriate, and with the consent of the student's parents or a student who has reached the age of majority; and
13. When considering initial or continued placement of a student in a career and technical education program, a representative from career and technical education, preferably the teacher.

The special education teacher or special education provider that participates in the ARD committee meeting must be appropriately certified or licensed as required by 34 C.F.R. 300.18 and 300.156.

19 TAC 75.1023(d)(1), 89.1050(c); 20 U.S.C. 1414(d)(1)(B); 34 C.F.R. 300.321;

A district member of the ARD committee shall not be required to attend an IEP meeting, in whole or in part, if the parent and the district agree in writing that the attendance is not necessary because the member's area of the curriculum or related services is not being modified or discussed during the meeting.

A district member of the ARD committee may be excused from attending an IEP meeting, in whole or in part, when the meeting involves a modification to or discussion of the member's area of curriculum or related services if the parent, in writing, and the district consent to the excusal and the member submits, in writing, to the parent and the ARD committee, input into the development of the IEP before the meeting.

20 U.S.C. 1414(d)(1)(C); 34 C.F.R. 300.321(e)

*Regular
Education
Teacher*

If an ARD committee is required to include a regular education teacher, the regular education teacher must, to the extent practicable, be a teacher who is responsible for implementing a portion of the child's IEP. *Education Code 29.005(a)*

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*Parent
Involvement*

A district shall take steps to ensure that one or both parents of a student with a disability are present at each ARD committee meeting or are afforded an opportunity to participate, including:

1. Notifying the parents of the meeting early enough to ensure that they will have an opportunity to attend (the notice shall include the purpose, time, and location of the meeting, who will be in attendance, that persons with knowledge or special expertise may be invited by either the parent or the district, and that the Part C service coordinator or other representatives of the Part C system may be invited to the initial meeting for a child previously served under a Part C early childhood intervention program); and
2. Scheduling the meeting at a mutually agreed on time and place.

If the purpose of the meeting is to consider transition services, the notice must also indicate this purpose, indicate that the district will invite the student, and identify any other agency that will be invited to send a representative.

34 C.F.R. 300.322(a)–(b); 19 TAC 89.1050(d)

*Alternative
Means of
Meeting
Participation*

If neither parent can attend an ARD meeting, the district must allow other methods of participation, such as through telephone calls or video conferencing. *20 U.S.C. 1414(f); 34 C.F.R. 300.322(c); 19 TAC 89.1050(d)*

An ARD meeting may be conducted without a parent in attendance if a district is unable to convince the parents that they should attend, but the district shall have a record of its attempts to arrange a mutually agreed on time and place, such as detailed records of telephone calls, correspondence, or visits made or attempted and the results of any of those actions. *34 C.F.R. 300.322(d)*

Meetings

A district shall initiate and conduct ARD committee meetings for the purpose of developing, reviewing, and revising the IEP of a child with a disability. The committee shall review each child's IEP periodically, and, if appropriate, revise the IEP. A meeting must be held for this purpose at least once a year. The ARD committee must also determine the child's placement once a year.

A "meeting" does not include informal or unscheduled conversations involving district personnel and conversations on issues such as teaching methodology, lesson plans, or coordination of service provisions if those issues are not addressed in the child's IEP. A "meeting" also does not include preparatory activities that district

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personnel engage in to develop a proposal or response to a parent proposal that will be discussed at a later meeting.

20 U.S.C. 1414(d)(4); 34 C.F.R. 300.116(b)(1), .324(b), (c)(1), .501(b)(3)

*Meeting at
Parent's Request*

Upon receipt of a written request for an ARD committee meeting from a parent, the school district must schedule and convene a meeting in accordance with the procedures in 19 Administrative Code 89.1050(d) or within five school days, provide the parent with written notice explaining why the district refuses to convene a meeting. *19 TAC 89.1050(e)*

Written Notice

If a parent is unable to speak English, a district must provide the parent with a written notice regarding the ARD committee meeting required under 19 Administrative Code 89.1050(d) (notice for purposes of scheduling) or (e)(2) (notice explaining why the district refuses to convene a meeting) in the parent's native language, unless it is clearly not feasible to do so. If the parent's native language is not a written language, the school district must take steps to ensure that the notice is translated orally or by other means to the parent in his or her native language or other mode of communication so that the parent understands the content of the notice. *19 TAC 89.1050(f)*

Transfer Students

In-State Transfers

When a student transfers to a new district within the state in the same school year and the parents verify that the student was receiving special education services in the previous district or the previous district verifies in writing or by telephone that the student was receiving special education services, the new school district must meet the requirements of 34 C.F.R. 300.323(e) regarding the provision of special education services. The timeline for completing the requirements outlined in 34 C.F.R. 300.323(e)(1) or (2) is 30 school days from the date the student is verified as being a student eligible for special education services.

Transfers from
Another State

When a student transfers from a district in another state in the same school year and the parents verify that the student was receiving special education services in the previous district or the previous district verifies in writing or by telephone that the student was receiving special education services, the new district must meet the requirements of 34 C.F.R. 300.323(f) regarding the provision of special education services. If the new district determines that an evaluation is necessary, the evaluation is considered a full individual and initial evaluation and must be completed within the timelines established by 19 Administrative Code 89.1011(c) and (e). The timeline for completing the requirements in 34 C.F.R. 300.323(f)(2), if appropriate, is 30 calendar days from the date of the completion of the evaluation report. If the school district deter-

mines that an evaluation is not necessary, the timeline for completing the requirements outlined in 34 C.F.R. 300.323(f)(2) is 30 school days from the date the student is verified as being a student eligible for special education services.

A student with a disability who has an IEP in place from a previous in- or out-of-state district and who enrolls in a new district during the summer is not considered a transfer student for the purposes of this provision or for 34 C.F.R. 300.323(e) or (f). For these students, the new district must implement the IEP from the previous district in full on the first day of class of the new school year or must convene an ARD committee meeting during the summer to revise the student's IEP for implementation on the first day of class of the new school year.

19 TAC 89.1050(j)

Transfer of Records

The district in which the child enrolls shall take reasonable steps to promptly obtain the child's records, including the IEP and supporting documents and any other records relating to the provision of special education or related services to the child, from the previous district.

The previous district shall take reasonable steps to promptly respond to the request from the new district and must furnish the new school district with a copy of the student's records, including the student's special education records, not later than the tenth working day after the date a request for the information is received by the previous school district.

20 U.S.C. 1414(d)(2)(C)(ii); 34 C.F.R. 300.323(g); 19 TAC 89.1050(j)(3)

Students Who Are Homeless or in Substitute Care

When a student who is homeless or in substitute care transfers into a district after being referred by a previous district for a special education evaluation, the receiving district must accept the referral and ensure that any written report of a full individual and initial evaluation is completed in accordance with the timelines established in 19 Administrative Code 89.1011 (relating to Full and Individual Initial Evaluation).

When a student who is homeless or in substitute care is eligible for special education and transfers into a new district during the school year, the receiving district must ensure that it meets the student transfer requirements of 19 Administrative Code 89.1050(j) (relating to the Admission, Review, and Dismissal Committee).

19 TAC 89.1615

Military Dependents

A district shall initially provide comparable services to a military student with disabilities based on his or her current IEP. This does not preclude the district from performing subsequent evaluations to ensure appropriate placement of the student. *Education Code 162.002 art. V, C* [See FDD]

**Individualized
Education Program**

A district shall develop, review, and revise an IEP for each child with a disability. *20 U.S.C. 1412(a)(4); 34 C.F.R. 300.320(a)*

At the beginning of each school year, a district shall have in effect, for each child with a disability in its jurisdiction, an IEP. *20 U.S.C. 1414(d)(2)(A); 34 C.F.R. 300.323(a)*

The term “individualized education program” means a written statement for each student with a disability that documents the decisions of the ARD committee with respect to issues discussed at each committee meeting and includes:

1. A statement of the student’s present levels of academic achievement and functional performance;
2. A statement of measurable annual goals, including academic and functional goals;
3. A description of how the student’s progress toward the annual goals will be measured and when periodic reports on the progress of the student will be provided;
4. A statement of the specific special education and related services and supplementary aids and services, based on peer-reviewed research to the extent practicable, to be provided to the student;
5. A statement of the program modifications or supports for school personnel that will be provided for the student;
6. An explanation of the extent, if any, to which the student will not participate with nondisabled students in the regular class and in extracurricular and nonacademic activities;
7. The projected dates for initiation of services and modifications and the anticipated frequency, location, and duration of these services and modifications;
8. A statement of any individual appropriate and allowable accommodations that are necessary to measure the academic achievement and functional performance of the student on state or district-wide assessments;
9. If the ARD committee determines that the student must take an alternative assessment instead of a particular regular state

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or district-wide assessment, a statement of why the student cannot participate in the regular assessment and why the particular assessment selected is appropriate for the student;

10. If the ARD committee determines that a student is in need of extended school year (ESY) services, identification of the goals and objectives that will be addressed during ESY services;
11. Beginning not later than when a student reaches 14 years of age and updated annually thereafter, the ARD committee's consideration and decisions regarding the transition issues under 19 Administrative Code 89.1055(h) [see EHBAD];
12. Beginning not later than the first IEP to be in effect when the student is 16, or younger if determined appropriate by the ARD committee, and updated annually thereafter, a statement of appropriate measurable postsecondary goals and transition services needed to assist the student in reaching those goals [see EHBAD];
13. Beginning not later than one year before the student reaches the age of 17, a statement that the student has been informed of the rights that will transfer to the student upon reaching the age of majority;
14. The date of the meeting;
15. The name, position, and signature of each member participating in the meeting; and
16. An indication of whether the child's parents, the adult student, if applicable, and the administrator agreed or disagreed with the decisions of the ARD committee.

20 U.S.C. 1414(d); 34 C.F.R. 300.320; Education Code 29.005(b-1), .011; 19 TAC 89.1055

The written statement of a student's IEP may be required to include only information included in the model form developed by the Texas Education Agency (TEA) under Education Code 29.0051(a) and posted on the TEA website. A district may use the model form to comply with the requirements for an IEP under 20 U.S.C. 1414(d). *Education Code 29.005(f), .0051*

IEP Supplement

For each child who was enrolled in a district's special education program during the 2019–20 school year or the 2020–21 school year, the district shall prepare a supplement to be included with the written statement of the IEP. For more information about the required supplement, see Education Code 29.0052 and the commis-

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sioner rules, when adopted. This requirement expires September 1, 2023. *Education Code 29.0052*

Supplemental
Special Education
Services

The ARD committee of a student approved for participation in the supplemental special education services and instructional materials program shall provide to the student's parent at an ARD committee meeting for the student:

1. Information regarding the types of supplemental special education services available under the program and provided by agency-approved providers for which an account maintained under Education Code 29.042(b) for the student may be used; and
2. Instructions regarding accessing the account.

The supplemental special education services and instructional materials program (SSES) expires September 1, 2024.

Education Code 29.048

A district shall notify parents and guardians of students served by special education of the SSES program and how to apply.

A student's ARD committee may not consider a student's current or anticipated eligibility for any supplemental special education instructional materials or services that may be provided under the SSES program when developing or revising a student's IEP, when determining a student's educational setting, or in the provision of a free appropriate public education.

19 TAC 102.1601(i)-(j)

Behavioral
Intervention Plan

The ARD committee may determine that a behavior improvement plan or a behavioral intervention plan is appropriate for a student for whom the committee has developed an IEP. *Education Code 29.005(g)*

If the committee makes that determination, the behavior improvement plan or behavioral intervention plan shall be included as part of the student's IEP and provided to each teacher with responsibility for educating the student.

If a behavior improvement plan or a behavioral intervention plan is included as part of a student's IEP, the ARD committee shall review the plan at least annually, and more frequently if appropriate, to address:

1. Changes in a student's circumstances that may impact the student's behavior, such as:

- a. The placement of the student in a different educational setting;
- b. An increase or persistence in disciplinary actions taken regarding the student for similar types of behavioral incidents;
- c. A pattern of unexcused absences; or
- d. An unauthorized, unsupervised departure from an educational setting; or

2. The safety of the student or others.

19 TAC 89.1055(g); Education Code 29.005(h)

Translation of IEP
into Native
Language

If the parent is unable to speak English and Spanish is the parent's native language, a district shall provide a written or audiotaped copy of the student's IEP translated into Spanish. If the parent's native language is other than Spanish or English, a district shall make a good faith effort to provide a written or audiotaped copy of the student's IEP translated into the parent's native language.
Education Code 29.005(d)

A written copy of the student's IEP translated into Spanish or the parent's native language means that all of the text in the student's IEP in English is accurately translated into the target language in written form. The IEP translated into the target language must be a comparable rendition of the IEP in English and not a partial translation or summary of the IEP in English.

An audio recording of the student's IEP translated into Spanish or the parent's native language means that all of the content in the student's IEP in English is orally translated into the target language and recorded with an audio device. A district is not prohibited from providing the parent with an audio recording of an ARD committee meeting at which the parent was assisted by an interpreter as long as the audio recording provided to the parent contains an oral translation into the target language of all of the content in the student's IEP in English.

If a parent's native language is not a written language, the district must take steps to ensure that the student's IEP is translated orally or by other means to the parent in his or her native language or other mode of communication.

Under 34 C.F.R. 300.322(f), a district must give a parent a written copy of the student's IEP at no cost to the parent. A school district meets this requirement by providing a parent with a written copy of the student's IEP in English or by providing a parent with a written

translation of the student's IEP in the parent's native language as provided above.

19 TAC 89.1050(i)

Autism/Pervasive
Developmental
Disorder

For students with autism/pervasive developmental disorders, the following strategies shall be considered by the ARD committee, based on peer-reviewed, research-based educational programming practices to the extent practicable and, when needed, addressed in the IEP:

1. Extended educational programming;
2. Daily schedules reflecting minimal unstructured time and active engagement in learning activities;
3. In-home training and community-based training or viable alternatives that assist the student with the acquisition of social/behavioral skills;
4. Positive behavior support strategies based on relevant information;
5. Beginning at any age, futures planning for integrated living, work, community, and educational environments that considers skills necessary to function in current and postsecondary environments;
6. Parent/family training and support, provided by qualified personnel with experience in Autism Spectrum Disorders (ASD);
7. Suitable staff-to-student ratio appropriate to identified activities and as needed to achieve social/behavioral progress based on the student's developmental and learning level (acquisition, fluency, maintenance, generalization) that encourages work towards individual independence;
8. Communication interventions, including language forms and functions that enhance effective communication across settings;
9. Social skills supports and strategies based on social skills assessment/curriculum and provided across settings;
10. Professional educator/staff support; and
11. Teaching strategies based on peer-reviewed, research-based practices for students with ASD.

If the ARD committee determines that services are not needed in one or more of the areas in 1–11 above, the IEP shall include a

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statement reflecting that decision and the basis upon which the determination was made.

19 TAC 89.1055(e)–(f)

*Visual
Impairment*

If a district provides special education services to students with visual impairments, it shall have written procedures as required in Education Code 30.002(c)(10) (staff access to resources). *19 TAC 89.1075(b)*

*Collaborative
Process*

All members of the ARD committee shall have the opportunity to participate in a collaborative manner in developing the IEP. Decisions of the ARD committee concerning the required elements of the IEP shall be made by mutual agreement, if possible. The ARD committee may agree to an annual IEP or an IEP of shorter duration.

Ten-Day Recess

When mutual agreement about all required elements of the IEP is not achieved, the parent who disagrees must be offered a single opportunity to recess and reconvene the ARD committee meeting. The period of time for reconvening the ARD committee meeting must not exceed ten school days, unless the parties mutually agree otherwise. The ARD committee must schedule the reconvened meeting at a mutually agreed upon time and place. The opportunity to recess and reconvene is not required when:

1. The student's presence on campus represents a danger of physical harm to the student or others;
2. The student has committed an expellable offense; or
3. The student has committed an offense that may lead to placement in a disciplinary alternative education program. [See FOF]

These requirements do not prohibit the ARD committee from recessing an ARD committee meeting for reasons other than the failure to reach mutual agreement about all required elements of an IEP.

During the recess, the ARD committee members must consider alternatives, gather additional data, prepare further documentation, and/or obtain additional resource persons who may assist in enabling the ARD committee to reach mutual agreement.

*Failure to Reach
Agreement*

If a recess is implemented and the ARD committee still cannot reach mutual agreement, a district shall implement the IEP it has determined to be appropriate for the student. Each member of the ARD committee who disagrees with the IEP developed by the ARD

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committee is entitled to include a statement of disagreement in the IEP.

If the IEP is not developed by agreement, the written statement of the program must include the basis of the disagreement. Each member of the ARD committee who disagrees with the IEP developed by the committee is entitled to include a statement of disagreement in the written statement of the program.

Education Code 29.005(c); 19 TAC 89.1050(g)

**Modification of
Existing IEP**

Changes to the IEP may be made either by the entire ARD committee or by amending the IEP by agreement, rather than redrafting the entire IEP.

After the annual IEP meeting for a school year, the parent and district may agree not to convene an IEP meeting for the purposes of making changes to the IEP and instead may develop a written document to amend or modify the child's current IEP.

Upon request, a parent shall be provided with a revised copy of the IEP with amendments incorporated.

To the extent possible, a district shall encourage the consolidation of reevaluation meetings for the child and other ARD meetings for the child.

20 U.S.C. 1414(d)(3)(D)–(F); 34 C.F.R. 300.324(a)(4)–(6)

**Teacher Access to
IEP**

Each district must ensure that each teacher who provides instruction to a student with a disability has access to relevant sections of the student's current IEP, is informed of the teacher's specific responsibilities related to implementation of the IEP, and has an opportunity to request assistance regarding implementation of the student's IEP. *19 TAC 89.1075(c)*

**Teacher Request to
Review IEP**

Each district shall develop a process to be used by a teacher who instructs a student with a disability in a regular classroom setting:

1. To request a review of the student's IEP;
2. To provide input in the development of the student's IEP;
3. That provides for a timely district response to the teacher's request; and
4. That provides for notification to the student's parent or legal guardian of that response.

Education Code 29.001(11); 19 TAC 89.1075(d)

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**Parental Consent
Not Required**

An employee of a district is not required to obtain the consent of a child's parent before the employee may make a videotape of a child or authorize the recording of a child's voice if the videotape or voice recording is to be used for a purpose related to the promotion of student safety under Education Code 29.022. *Education Code 26.009(b)*

**Video Surveillance of
Special Education
Settings**

In order to promote student safety, on receipt of an authorized written request, a district shall provide equipment, including a video camera, to the campus in the district specified in the request.

**Classroom or Other
Setting**

A campus that receives equipment shall place, operate, and maintain one or more video cameras in self-contained classrooms and other special education settings in which a majority of the students in regular attendance are provided special education and related services and are assigned to one or more self-contained classrooms or other special education settings for at least 50 percent of the instructional day, provided that:

1. A campus that receives equipment as a result of the request by a parent or staff member is required to place equipment only in classrooms or settings in which the parent's child is in regular attendance or to which the staff member is assigned, as applicable; and
2. A campus that receives equipment as a result of the request by a board of trustees, principal, or assistant principal is required to place equipment only in classrooms or settings identified by the requestor, if the requestor limits the request to specific classrooms or settings subject to Education Code 29.022.

Education Code 29.022(a)

Definitions

"Incident" means an event or circumstance that:

Incident

1. Involves alleged "abuse" or "neglect," as described in Family Code 261.001, of a student by a staff member of the district or alleged "physical abuse" or "sexual abuse," as described in Family Code 261.410, of a student by another student; and
2. Allegedly occurred in a self-contained classroom or other special education setting in which video surveillance under Education Code 29.022 and 19 Administrative Code 103.1301 is conducted.

*Other Special
Education Setting*

"Other special education setting" means a classroom on a separate campus (i.e., a campus that serves only students who receive special education and related services) of a district—including a room attached to the classroom or setting used for time-out—in which a

majority of the students in regular attendance are provided special education and related services, are assigned to the setting for at least 50 percent of the instructional day, and have one of the following instructional arrangements/settings described in the student attendance accounting handbook:

1. Residential care and treatment facility—separate campus; or
2. Off home campus—separate campus.

Parent

“Parent” means a person described in Education Code 26.002, whose child receives special education and related services in one or more self-contained classrooms or other special education settings. “Parent” also means a student who receives special education and related services in one or more self-contained classrooms or other special education settings and who is 18 years of age or older or whose disabilities of minority have been removed for general purposes under Family Code, Chapter 31, unless the student has been determined to be incompetent or the student's rights have been otherwise restricted by a court order.

School Business Day

“School business day” means a day that campus or district administrative offices are open.

Self-contained Classroom

“Self-contained classroom” means a classroom on a regular campus (i.e., a campus that serves students in general education and students in special education), including a room attached to the classroom used for time-out, but not including a classroom that is a resource room instructional arrangement under Education Code 48.102, in which a majority of the students in regular attendance are provided special education and related services for at least 50 percent of the instructional day and have one of the following instructional arrangements/settings described in the student attendance accounting handbook:

1. Self-contained (mild/moderate/severe) regular campus;
2. Full-time early childhood (preschool program for children with disabilities) special education setting;
3. Residential care and treatment facility—self-contained (mild/moderate/severe) regular campus;
4. Residential care and treatment facility—full-time early childhood special education setting;
5. Off home campus—self-contained (mild/moderate/severe) regular campus; or
6. Off home campus—full-time early childhood special education setting.

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<i>Staff Member</i>	"Staff member" means a teacher, a related service provider, a paraprofessional, a counselor, or an educational aide assigned to work in the self-contained classroom or other special education setting.
<i>Time-out</i>	"Time-out" has the meaning assigned by Education Code 37.0021.
<i>Video Camera</i>	"Video camera" means a video surveillance camera with audio recording capabilities.
<i>Video Equipment</i>	"Video equipment" means one or more video cameras and any technology and equipment needed to place, operate, and maintain video cameras as required by Education Code 29.022 and 19 Administrative Code 103.1301. "Video equipment" also means any technology and equipment needed to store and access video recordings as required. <i>19 TAC 103.1301(b); Education Code 29.022</i>
<i>Administrative Coordinator</i>	Each district shall designate an administrator at the primary administrative office of the district with responsibility for coordinating the provision of equipment to schools and campuses. <i>Education Code 29.022(a-2)</i>
<i>Authorized Requestors</i>	The following people may request in writing that equipment be provided to a campus at which one or more children receive special education services in a qualifying classroom or setting: 1. A parent of a child who receives special education services for the campus at which the child receives those services; 2. The board of trustees for one or more specified campuses; 3. The principal or assistant principal for their campus; and 4. A staff member assigned to work with one or more children receiving special education services for the campus at which the staff member works. <i>Education Code 29.022(a-1)</i>
<i>Processing the Request</i>	A written request must be submitted and acted on as follows: 1. A parent, staff member, or assistant principal must submit a request to the principal or the principal's designee of the campus addressed in the request, and the principal or designee must provide a copy of the request to the district's designated administrator; 2. A principal must submit a request by the principal to the district's designated administrator; and

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3. A board of trustees must submit a request to the district's designated administrator, and the administrator must provide a copy of the request to the principal or the principal's designee of the campus addressed in the request.

A campus shall operate and maintain the camera in the classroom or setting as long as the classroom or setting continues to satisfy these requirements, for the remainder of the school year in which the campus received the request, unless the requestor withdraws the request in writing.

Education Code 29.022(a-3)–(b)

Video Camera
Coverage

The video cameras must be capable of:

1. Covering all areas of the classroom or setting, including a room attached to the classroom or setting used for time-out; and
2. Recording audio from all areas of the classroom or setting, including a room attached to the classroom or setting used for time-out.

The inside of a bathroom or any area in the classroom or other special education setting in which a student's clothes are changed may not be visually monitored, except for incidental coverage of a minor portion of a bathroom or changing area because of the layout of the classroom or setting.

Education Code 29.022(c)–(c-1)

Written Notice

Before a campus activates a video camera in a classroom or special education setting, the campus shall provide written notice of the placement to all campus staff and to the parents of each student attending class or engaging in school activities in the classroom or setting.

If for any reason a campus will discontinue operation of a video camera during a school year, not later than the fifth school day before the date the operation of the video camera will be discontinued, the campus must notify the parents of each student in regular attendance in the classroom or setting that operation of the video camera will not continue unless requested by a person eligible to make a request. Not later than the tenth school day before the end of each school year, the campus must notify the parents of each student in regular attendance in the classroom or setting that operation of the video camera will not continue during the following

school year unless a person eligible to make a request for the next school year submits a new request.

Education Code 29.022(b), (d)

Retention Period

A district shall retain video recorded from a video camera for at least three months after the date the video was recorded.

If a person requests to view a video recording from a video camera, a district must retain the recording from the date of receipt of the request until the person has viewed the recording and a determination has been made as to whether the recording documents an alleged incident. If the recording documents an alleged incident, the district or campus shall retain the recording until the alleged incident has been resolved, including the exhaustion of all appeals.

Education Code 29.022(e)–(e-1)

Gifts, Grants, and Donations

A district may solicit and accept gifts, grants, and donations from any person to implement the requirements of Education Code 29.022 and 19 Administrative Code 103.1301. A district is not permitted to use Individuals with Disabilities Education Act, Part B, funds or state special education funds to implement these requirements. *19 TAC 103.1301(d)*

No Waiver of Immunity

The requirements described by Education Code 29.022 do not:

1. Waive any immunity from liability of a district, or of district officers or employees; or
2. Create any liability for a cause of action against a district or against district officers or employees.

No Monitoring

A district may not:

1. Allow regular or continual monitoring of video recorded under Education Code 29.022; or
2. Use video for teacher evaluation or for any other purpose other than the promotion of safety of students receiving special education services.

Education Code 29.022(g)–(h)

Confidentiality

A video recording of a student made under this provision is confidential and may not be released or viewed except as provided below.

Limited Release

A district shall release a recording for viewing by:

1. An employee who is involved in an alleged incident that is documented by the recording and has been reported to the district, on request of the employee;
2. A parent of a student who is involved in an alleged incident that is documented by the recording and has been reported to the district or campus, on request of the parent;
3. Appropriate Department of Family and Protective Services (DFPS) personnel as part of an investigation of alleged or suspected abuse or neglect of a child under Family Code 261.406;
4. A peace officer, a school nurse, a district administrator trained in de-escalation and restraint techniques as provided by commissioners rule, or a human resources staff member designated by the board in response to a report of an alleged incident or an investigation of district personnel or a report of alleged abuse committed by a student; or
5. Appropriate agency or State Board for Educator Certification personnel or agents as part of an investigation.

A contractor or employee performing job duties relating to the installation, operation, or maintenance of video equipment or the retention of video recordings who incidentally views a video recording does not violate these confidentiality provisions.

Education Code 29.022(i)–(i-1); 19 TAC 103.1301(h)–(i)

Duty to Report

If a person described by item 4 or 5, above, views a video recording and has cause to believe that the recording documents possible abuse or neglect of a child under Family Code Chapter 261, the person must submit a report to the Texas Department of Family and Protective Services or other authority in accordance with the local policy adopted under 19 Administrative Code 61.1051 (Reporting Child Abuse and Neglect) and Family Code Chapter 261 [see FFG].

19 TAC 103.1301(j); Education Code 29.022(j)

*Use in
Disciplinary
Actions Against
District Personnel*

If a person described by items 3, 4, or 5, above, views the recording and believes that it documents a possible violation of district or campus policy, the person may allow access to the recording to appropriate legal and human resources personnel of the district to the extent not limited by the Family Educational Rights and Privacy Act (FERPA) or other law. A recording believed to document a possible violation of district policy relating to the neglect or abuse of a student may be used in a disciplinary action against district personnel and must be released in a legal proceeding at the request of a

parent of the student involved in the incident documented by the recording. A recording believed to document a possible violation of district policy relating to the neglect or abuse of a student must be released for viewing by the district employee who is the subject of the disciplinary action at the request of the employee. *19 TAC 103.1301(k)*

*Federal Law /
FERPA*

19 Administrative Code 103.1301(j) (child abuse reporting) and (k) (disciplinary actions against personnel) do not limit the access of a student's parent to a record regarding the student under FERPA or other law. To the extent any provisions in Education Code 29.022 and 19 Administrative Code 103.1301 conflict with FERPA or other federal law, federal law prevails. *19 TAC 103.1301(l)*

District Policy

A district must adopt written policies relating to the placement, operation, and maintenance of video cameras under Education Code 29.022 and 19 Administrative Code 103.1301. At a minimum, the policies must include:

1. A statement that video surveillance is for the purpose of promoting student safety in certain self-contained classrooms and other special education settings;
2. Information on how a person may appeal an action by the district that the person believes to be in violation of this section or a policy adopted in accordance with this section, including the appeal and expedited review processes under 19 Administrative Code 103.1303 (Commissioner's Review of Actions Concerning Video Cameras in Special Education Settings) and the appeals process under Education Code 7.057;
3. A requirement that the district provide a response to a request made under this section not later than the seventh school business day after receipt of the request by the person to whom it must be submitted under Education Code 29.022(a-3) (at Limited Release, above) that authorizes the request or states the reason for denying the request;
4. Except as provided by item 6 of this provision, a requirement that a campus begin operation of a video camera in compliance with this provision not later than the 45th school business day, or the first school day after the 45th school business day if that day is not a school day, after the request is authorized unless the Texas Education Agency (TEA) grants an extension of time;
5. A provision permitting the parent of a student whose admission, review, and dismissal (ARD) committee has determined that the student's placement for the following school year will

be in a classroom or other special education setting in which a video camera may be placed under this section to make a request for the video camera by the later of:

- a. The date on which the current school year ends; or
 - b. The tenth school business day after the date of the placement determination by the ARD committee;
6. A requirement that, if a request is made by a parent in compliance with item 5 of this provision, unless TEA grants an extension of time, a campus begins operation of a video camera in compliance with this provision not later than the later of:
- a. The tenth school day of the fall semester; or
 - b. The 45th school business day, or the first school day after the 45th school business day if that day is not a school day, after the date the request is made;
7. The procedures for requesting video surveillance and the procedures for responding to a request for video surveillance;
8. The procedures for providing advanced written notice to the campus staff and the parents of the students assigned to a self-contained classroom or other special education setting that video and audio surveillance will be conducted or cease in the classroom or setting, including procedures for notice, in compliance with Education Code 29.022(b), of the opportunity to request continued video and audio surveillance if video and audio surveillance will otherwise cease;
9. A requirement that video cameras be operated at all times during the instructional day when one or more students are present in a self-contained classroom or other special education setting in which video cameras are placed;
10. A statement regarding the personnel who will have access to video equipment or video recordings for purposes of operating and maintaining the equipment or recordings;
11. A requirement that a campus continue to operate and maintain any video camera placed in a self-contained classroom or other special education setting for as long as the classroom or setting continues to satisfy the requirements in Education Code 29.022(a), for the remainder of the school year in which the campus received the request, unless the requester withdraws the request in writing;
12. A requirement that video cameras placed in a self-contained classroom or other special education setting be capable of

recording video and audio of all areas of the classroom or setting, except that no visual monitoring of bathrooms and areas in which a student's clothes are changed may occur. Incidental visual coverage of the inside of a bathroom or any area of the classroom or other special education setting in which a student's clothes are changed is permitted only to the extent that such coverage is the result of the layout of the classroom or setting. Audio recording of the inside of a bathroom or any area of the classroom or other special education setting in which a student's clothes are changed is required;

13. A statement that video recordings must be retained for at least three months after the date the video was recorded and that video recordings will be maintained in accordance with the requirements of Education Code 29.022(e-1), when applicable;
14. A statement that the regular or continual monitoring of video is prohibited and that video recordings must not be used for teacher evaluation or monitoring or for any purpose other than the promotion of student safety;
15. At the district's discretion, a requirement that campuses post a notice at the entrance of any self-contained classroom or other special education setting in which video cameras are placed stating that video and audio surveillance are conducted in the classroom or setting;
16. The procedures for reporting an allegation to the district that an incident occurred in a self-contained classroom or other special education setting in which video surveillance under Education Code 29.022 and 19 Administrative Code 103.1301 is conducted;
17. The local grievance procedures for filing a complaint alleging violations of Education Code 29.022, and/or 19 Administrative Code 103.1301; and
18. A statement that video recordings made under Education Code 29.022 and 19 Administrative Code 103.1301 are confidential and a description of the limited circumstances under which the recordings may be viewed.

19 TAC 103.1301(g)

Governmental
Record

A video recording under this section is a governmental record only for purposes of Penal Code 37.10.

Operation of
Camera

These provisions apply to the placement, operation, and maintenance of a video camera in a self-contained classroom or other

special education setting during the regular school year and extended school year services.

A video camera placed under this section is not required to be in operation for the time during which students are not present in the classroom or other special education setting.

Education Code 29.022(s)–(t)

Exclusions	A district is not required to provide video equipment to a campus of another district or charter school or to a nonpublic school. <i>19 TAC 103.1301(c)</i>
Dispute Resolution	The special education dispute resolution procedures in 34 Code of Federal Regulations 300.151–.153 and 300.504–.515 do not apply to complaints alleging that a district has failed to comply with Education Code 29.022 and 19 Administrative Code 103.1301. Complaints alleging violations of those sections must be addressed through the district’s local grievance procedures or other dispute resolution channels. <i>19 TAC 103.1301(e)</i>
Denial of Request	The following standards and procedures apply to a denial of a request for placement of a video camera under Education Code 29.022(a), or to the denial of a request to release a video or to view a video made under Education Code 29.022(i) or (l)(2).
<i>Exhaustion of Administrative Remedies</i>	Once a request for placement of a video camera or a request to release a video is administratively denied, the requester must exhaust administrative remedies through the district’s grievance process even if the requester opts for the expedited review process. However, a district, parent, staff member, or administrator may request an expedited review even before the local remedies are exhausted. After local remedies are exhausted by filing a grievance with the board and obtaining a board determination, the requester may appeal the denial to the commissioner of education under Education Code 7.057 by filing a petition for review.
<i>Proper Request</i>	In a case where there is a denial of a request for the placement of a video camera, the commissioner will determine whether the person requesting placement is a person allowed to request placement under Education Code 29.022(a-1) (see Limited Release, above) and whether the requester made a proper request under Education Code 29.022(a-3) (see Processing the Request, above).
Cost	The commissioner will not consider the cost to the district of installing cameras or releasing video.

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*Release
Determination*

In a case where there is a denial of a request to release a video, the commissioner will determine whether the requester is a person allowed to receive a video under Education Code 29.022(i) (described at Limited Release, above).

*Timelines for
Petition for
Review*

The following timelines are established for filing a petition for review:

1. A petition for review shall be filed with the commissioner within ten calendar days of the decision of the board denying the request being first communicated to the requester or requester's counsel, whichever occurs first. The petition for review shall be made in accordance with 19 Administrative Code 157.1073(c) (hearings brought under Education Code 7.057) and may include a request for expedited review.
2. The district's answer and local record shall comply with 19 Administrative Code 157.1052(b) and (c) and 19 Administrative Code 157.1073(d) and shall be filed with the commissioner within ten calendar days of the district receiving notification from the commissioner of the appeal.
3. The procedures specified in 19 Administrative Code 157.1059; .1061; and .1073(e)–(h), (j), and (k) apply to a case brought to the commissioner under this section.

*Expedited
Review*

A request for expedited review is governed by the following.

1. The expedited review process is designed to allow a requester to promptly receive a preliminary judgment from the commissioner as to a decision to deny a request for the installation of cameras or a decision to deny a request to release a video while at the same time respecting the school grievance process. The expedited review process does not apply to a request to only view a video. Invoking the expedited review process results in a prompt initial determination. However, the final commissioner's determination is to be based on a substantial evidence review of the district's grievance record. This allows for a full record to be developed at the district level and does not require the requester and the district to make an evidentiary record before TEA in Austin, Texas. Because the requirements of Education Code 7.057 are met when the board's decision is heard by the commissioner, an appeal to district court is allowed under Education Code 7.057(d). Education Code 29.022 does not by itself allow an appeal to district court.
2. A district, parent, staff member, or administrator may request an expedited review. Any request for an expedited review

shall include the names, telephone numbers, and addresses of all interested parties to the request. "Interested parties" are all persons who brought the grievance, all persons who have testified or provided written statements as part of the grievance process, and the district. The request for expedited review shall specify whether the district denied a request for the placement of a video camera or the district denied a request to release a video and briefly describe why that decision is either correct or incorrect.

3. A request for expedited review shall be filed with the commissioner no earlier than 14 business days after a request for placement of a video camera or a request to release a video is administratively denied under Education Code 29.022(i) or (l)(2) (see Limited Release and Process, above), and no later than the fifth business day after a board resolves a grievance as to a request for placement of a video camera or a request to release a video. A request for expedited review shall be filed with the commissioner electronically as provided on TEA's Division of Hearings and Appeals website or by U.S. Mail, facsimile, hand-delivery, or by a commercial delivery service.
4. Whenever an interested party files a document with the commissioner, with the exception of the request for expedited review, the interested party shall send the same document to all other interested parties by the same method that the document was sent to the commissioner. Hand-delivery of the document by the next day may be substituted for service by facsimile delivery.
5. If a request for expedited review is timely filed, the commissioner will establish a briefing schedule and will send to all interested parties a notice that an expedited review has been filed, which will include relevant statutes and rules. Any interested party who knows of any additional interested parties who have not been notified will promptly inform the commissioner in writing.
6. All briefing shall clearly state the facts relied upon. Documents relevant to the issues presented may be attached to a brief. All briefing shall provide the reasons why the commissioner should or should not grant the request for expedited review. Citations to statutes, rules, commissioner decisions, and case law are important to identify the legal basis for the claims made.

7. All interested parties who are in favor of granting the request for expedited review shall file briefing at the time specified for the requester of the expedited review.
8. All interested parties who are opposed to granting the request for expedited review shall file briefing at the same time.
9. Briefing is not limited to the issues specifically raised in the pleadings in the case. However, no new arguments may be raised in the reply briefs. Reply briefs may contain new citations to the record and legal authority as to issues previously raised.
10. A preliminary judgment shall be issued based on the briefing of the interested parties. The preliminary judgment will be sent to the requestor, the district, and all interested parties. If it is determined that a district is not likely to prevail on the issue of a request for the placement of video cameras or the issue of a request to view a video under full review, the district will fully comply with Education Code 29.022.
11. After a preliminary judgment is made, a final judgment will be made in accordance with the procedures set forth in 19 Administrative Code 103.1303(b)(1)–(5) (the Denial of Request Review process).

19 TAC 103.1303(b)

Extension of Time

A request by a district for an extension of time to begin the operation of a video camera under Education Code 29.022 shall be made and decided using the following procedures.

Request

Any request by a district for an extension of time to begin the operation of a video camera shall be filed with the commissioner prior to the 45th school business day after a request to begin operating a video camera is received. However, a district should request an extension of time as soon as it determines that an extension of time should be filed.

A request for an extension of time to begin the operation of a video camera shall specify why an extension of time should be granted. The request shall include affidavits supporting any factual claims made in the request and reference any legal authority as to why the request should be granted. The request may include a request for expedited review. The request shall name the individual who requested the installation of cameras and provide the individual's address and telephone number. Immediately following the individual's address and telephone number there shall appear in bold type: "You have been identified as the individual who requested the operation of a video camera that is the subject of this request to the

commissioner of education to extend the statutory timeline. You may, but are not required to, participate in the proceedings before the commissioner concerning the school district's request for an extension of time. It is entirely up to you whether and to what extent you wish to participate in these proceedings. The procedures governing these proceedings are found at 19 Texas Administrative Code 103.1303(c) and Texas Education Code 29.022."

A request for an extension of time to begin the operation of a video camera shall list the names, telephone numbers, and addresses of all interested parties to the request. All interested parties include all parents of students in the classroom or other special education setting for which a video camera has been requested and all staff who provided services in a classroom for which a video camera has been requested.

Filing Documents

All documents in a case shall be filed with the Division of Hearings and Appeals, Texas Education Agency, 1701 N. Congress Ave., Austin, Texas 78701, facsimile number (512) 475-3662. Documents shall be filed electronically as provided on the division's website or by mail, delivery, or facsimile. All documents must be actually received by the Division of Hearings and Appeals by the date specified in this section. The mailbox rule does not apply to filings in a case filed under this subsection. Electronic filing is strongly encouraged.

All filings in a case shall be sent to the district, the individual who initially requested the installation of the cameras, and all interested parties who have filed a request to receive documents filed in the case by the same method as the request is filed with the commissioner. Due to the requirements of FERPA, the names, telephone numbers, and addresses of parents and other publicly identifiable student information may not be given to the interested parties. The copies of the filings sent to interested parties shall be redacted to remove all personally identifiable student information.

Filing Responses

Any response to a request for an extension of time to begin the operation of a video camera shall be filed with the commissioner by an interested party within ten calendar days of the filing of the request. If no response to the request is timely filed, the commissioner shall issue a final decision within 20 calendar days of the filing of the request.

A response to a request for an extension of time to begin the operation of a video camera shall specify why an extension of time should or should not be granted. The response shall include affidavits concerning any factual claims made in the request and reference any legal authority as to why the request should or should not

be granted. The response may include a request for expedited review.

*Expedited
Review*

A request for expedited review must be filed with the commissioner within ten calendar days of the filing of the request for an extension of time to begin the operation of a video camera. If a request for expedited review is made, all interested parties shall be notified that they have been identified as interested parties in the request for an extension of time to begin the operation of a video camera. In particular, the interested parties will be informed that it is their choice whether to participate in the proceedings before the commissioner, that it is entirely up to them to determine to what extent they wish to participate in the proceedings, that the procedures governing these proceedings are found in 19 Administrative Code 103.1303 and Education Code 29.022, and that upon their written request filed with the commissioner they will be sent all filings in this case.

If a request for an expedited review is not made, the commissioner shall issue a final decision within 45 calendar days of the filing of the request for an extension of time to begin the operation of a video camera, unless the commissioner determines that an evidentiary hearing would be helpful in deciding the issues raised. If the commissioner decides to hold an evidentiary hearing, the commissioner shall establish the timelines and procedures to be used. Whether to conduct the hearing by telephone or other electronic methods will be considered.

If a request for expedited review is made, the following procedures shall be followed:

1. Any reply by the district to any response to the request shall be filed with the commissioner within 25 calendar days of the filing of the request for an extension of time to begin the operation of a video camera.
2. A preliminary judgment shall be made by the commissioner within 35 calendar days of the filing of the request for an extension of time to begin the operation of a video camera.
3. Any interested party or the district may file objections to the preliminary judgment within 40 calendar days of the filing of the request for an extension of time to begin the operation of a video camera.
4. Any reply to an objection to a preliminary judgment must be filed within 45 calendar days of the filing of a request for an extension of time to begin the operation of a video camera.

5. The commissioner shall issue a final decision within 55 calendar days of the filing of the request for an extension of time to begin the operation of a video camera, unless the commissioner determines that an evidentiary hearing would be helpful in deciding the issues raised. If the commissioner decides to hold an evidentiary hearing, the commissioner shall establish the timelines and procedures to be used. Whether to conduct the hearing by telephone or other electronic methods will be considered.

*Commissioner
Consideration*

In making either a preliminary judgment or a final judgment under this subsection, the commissioner will consider whether granting the requested extension is reasonable considering all factors, including contracting statutes, architectural and structural issues, and the difference in costs to the district if a moderate extension of time is granted.

No Appeal

A commissioner's final decision under this provision is not subject to appeal.

19 TAC 103.1303(c)

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**Designing and
Implementing
Services**

A district shall use student performance data from state basic skills assessment instruments and achievement tests to design and implement appropriate compensatory, intensive, or accelerated instructional services for students in the district's schools that enable the students to perform at grade level at the conclusion of the next regular school term. *Education Code 29.081(a)*

[See EHBCA for information regarding acceleration instruction and accelerated learning committees.]

**Intensive Program of
Instruction**

State Assessments

A district shall offer an intensive program of instruction to a student who does not perform satisfactorily on a state assessment instrument or is not likely to receive a high school diploma before the fifth school year following the student's enrollment in grade 9, as determined by the district.

The program shall be designed to:

1. Enable the student to:
 - a. To the extent practicable, perform at the student's grade level at the conclusion of the next regular school term; or
 - b. Attain a standard of annual growth specified by a district and reported by the district to TEA; and
2. If applicable, carry out the purposes of Education Code 28.0211. [See EIE]

Students Receiving
Special Education
Services

For a student in a special education program who does not perform satisfactorily on an assessment instrument administered under Education Code 39.023(a), (b), or (c), the student's admission, review, and dismissal committee shall design the program to:

1. Enable the student to attain a standard of annual growth on the basis of the student's individualized education program (IEP); and
2. If applicable, carry out the purposes of Education Code 28.0211. [See EIE]

Use of State Funds

A district shall use funds appropriated by the legislature for an intensive program of instruction to plan and implement intensive instruction and other activities aimed at helping a student satisfy state and local high school graduation requirements.

No Cause of Action

A district's determination of the appropriateness of an intensive program of instruction for a student is final and does not create a cause of action.

Education Code 28.0213

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**Compensatory
Education Allotment**

Census Block

On a schedule determined by the commissioner of education and in accordance with Education Code 48.104, each district shall report to the agency the census block group in which each student enrolled in the district who is educationally disadvantaged resides.
Education Code 48.104(i)

Use

At least 55 percent of the district's compensatory education funds must be used to:

1. Fund supplemental programs and services, including services provided by an instructional coach, designed to eliminate any disparity in performance on assessment instruments administered under Education Code Chapter 39, Subchapter B or disparity in the rates of high school completion between:
 - a. Students who are educationally disadvantaged and students who are not educationally disadvantaged; and
 - b. Students at risk of dropping out of school, as defined below, and all other students; or
2. Support a program eligible under Title I of the Elementary and Secondary Education Act of 1965 [see AID], and its subsequent amendments, and by federal regulations implementing that Act.

Education Code 48.104(k)

Dropout Prevention
Strategies

A district with a high dropout rate, as determined by the commissioner, shall submit a plan to the commissioner describing the manner in which the district intends to use its compensatory education allotment for developing and implementing research-based strategies for dropout prevention.

A district shall submit the plan not later than December 1 of each school year preceding the school year in which the district will receive the compensatory education allotment to which the plan applies.

A district may not spend or obligate more than 25 percent of the district's compensatory education allotment unless the commissioner approves the plan.

A district's plan shall:

1. Design a dropout recovery plan that includes career and technology education courses or technology applications courses that lead to industry or career certification;

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2. Integrate into the dropout recovery plan research-based strategies to assist students in becoming able academically to pursue postsecondary education, including:
 - a. High-quality, college readiness instruction with strong academic and social supports;
 - b. Secondary to postsecondary bridging that builds college readiness skills, provides a plan for college completion, and ensures transition counseling; and
 - c. Information concerning appropriate supports available in the first year of postsecondary enrollment to ensure postsecondary persistence and success, to the extent funds are available for the purpose; and
3. Plan to offer advanced academic and transition opportunities, including dual credit courses and college preparatory courses, such as advanced placement courses.

A district may enter into a partnership with a public junior college in accordance with Education Code 29.402 [see GNC] in order to fulfill a plan.

Any program designed to fulfill a plan must comply with the requirements of Education Code 29.081(e) and (f).

Education Code 29.918

Reporting

A district shall report financial information relating to expenditure of the state compensatory education allotment under the Foundation School Program to the Texas Education Agency (TEA), according to standards for financial accounting provided in 19 Administrative Code 109.41 (relating to *Financial Accountability System Resource Guide*). Costs charged to state compensatory education shall be for programs and services that supplement the regular education program. 19 TAC 109.25(a)

A district shall ensure that supplemental direct costs and personnel attributed to compensatory education and accelerated instruction are identified in district and/or campus improvement plans at the summary level for financial units or campuses. A district shall maintain documentation that supports the attribution of supplemental costs and personnel to compensatory education. A district must also maintain sufficient documentation supporting the appropriate identification of students in at-risk situations, under criteria established in Education Code 29.081 [see At-Risk Student, below]. 19 TAC 109.25(b)

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**Educationally
Disadvantaged
Students**

Student Eligibility

To be considered educationally disadvantaged in order to be counted to generate the compensatory education allotment pursuant to Education Code 48.104, a student must meet the income requirements for eligibility under the National School Lunch Program (NSLP), authorized by 42 U.S.C. 1751, et seq.

Districts may use the following approved methods for the purpose of receiving the compensatory education allotment pursuant to Education Code 48.104:

1. Parent certification, where the parent or guardian asserts meeting the income requirements for eligibility;
2. Direct certification, where the process by which eligible children are certified for free meals without the need for a household application based on household participation in one or more federal assistance programs; or
3. Direct verification, where public records are used to verify a student's eligibility for free or reduced-price meals when verification of student eligibility is required.

19 TAC 61.1027(a)

Virtual School
Network

Districts must request prior approval from the commissioner to claim students receiving a full-time virtual education through the state virtual school network in their counts of educationally disadvantaged students. The request must include a plan detailing the enhanced services to be delivered to full-time state virtual school network students and submitted in a manner and with a deadline specified by the commissioner. *19 TAC 61.1027(b)(3)(B)*

At-Risk Student

"Student at risk of dropping out of school" includes each student who is under 26 years of age and who:

1. Except as provided by TEA rule or if retained in prekindergarten under Education Code 28.02124 [see EIE], was not advanced from one grade level to the next for one or more school years, unless the student did not advance from prekindergarten or kindergarten to the next grade level only as a result of the request of the student's parent;
2. If the student is in grades 7–12, did not maintain an average equivalent to 70 on a scale of 100 in two or more subjects in the foundation curriculum during a semester in the preceding or current school year, or is not maintaining such an average in two or more subjects in the foundation curriculum in the current semester;

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3. Did not perform satisfactorily on a state assessment instrument and who has not in the previous or current school year subsequently performed on that instrument or another appropriate instrument at a level equal to at least 110 percent of the level of satisfactory performance on that instrument;
4. If the student is in prekindergarten, kindergarten, or grades 1–3, did not perform satisfactorily on a readiness test or assessment instrument administered during the current school year;
5. Is pregnant or is a parent;
6. Has been placed in a DAEP in accordance with Education Code 37.006 during the preceding or current school year;
7. Has been expelled in accordance with Education Code 37.007 during the preceding or current school year;
8. Is currently on parole, probation, deferred prosecution, or other conditional release;
9. Was previously reported through the Public Education Information Management System (PEIMS) to have dropped out of school;
10. Is an emergent bilingual student, as defined by Section 29.052;
11. Is in the custody or care of the Department of Family and Protective Services or has, during the current school year, been referred to the department by a school official, officer of the juvenile court, or law enforcement official;
12. Is homeless [see FD];
13. Resided in the preceding school year or resides in the current school year in a residential placement facility in a district, including a detention facility, substance abuse treatment facility, emergency shelter, psychiatric hospital, halfway house, cottage home operation, specialized child-care home, or general residential operation;
14. Has been incarcerated, or has a parent or guardian who has been incarcerated, within the lifetime of the student, in a penal institution as defined by Penal Code 1.07; or
15. Is enrolled in a district or a campus that is designated as a dropout recovery school under Education Code 39.0548.

Education Code 29.081(d)(1)

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	Regardless of the student's age, a student who participates in an adult education program provided under the adult high school charter school program is considered a "student at risk of dropping out of high school." <i>Education Code 29.081(d)(2)</i>
Local Eligibility Criteria	In addition to students described above, a student who satisfies local eligibility criteria adopted by a board may receive compensatory education services. The number of students receiving services under local eligibility criteria during a school year may not exceed ten percent of the number of students described above who received services from the district during the preceding school year. <i>Education Code 29.081(g)</i>
Dropout Recovery Education Programs	A district may use a private or public community-based dropout recovery education program to provide alternative education programs for students at risk of dropping out of school. The program may be offered at a campus or through the use of an online program that leads to a high school diploma and prepares the student to enter the workforce. A campus-based dropout recovery education program must meet the criteria set forth at Education Code 29.081(e-1)(1)–(5). An online dropout recovery education program must meet the criteria set forth at Education Code 29.081(e-2)(1)–(8). Students in attendance at a dropout recovery education program shall be included in a district's average daily attendance for funding purposes. <i>Education Code 29.081(e)–(f)</i>
Communities in Schools	An elementary or secondary school receiving funding under Education Code 33.156 shall participate in the Communities in Schools (CIS) program if the number of students enrolled in the school who are at risk of dropping out of school is equal to at least ten percent of the number of students in average daily attendance at the school, as determined by TEA. <i>Education Code 33.157</i>
Optional Extended Year Program	A district may set aside an amount from the district's compensatory education allotment or may apply to the agency for funding of an extended year program. <i>Education Code 29.082(a); 19 TAC 105.1001</i>
Optional Flexible Year Program	A district may provide an optional flexible year program (OFYP) for students who did not or are not likely to perform successfully on state assessment instruments or who would not otherwise be promoted to the next grade level. <i>Education Code 29.0821; 19 TAC 129.1029</i>

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**Optional Flexible
School Day Program**

Notwithstanding Education Code 25.081 or 25.082, a district may apply to the commissioner to provide a flexible school day program (OFSDP) for students who:

1. Have dropped out of school or are at risk of dropping out of school as defined by Education Code 29.081;
2. Attend a campus that is implementing an innovative redesign of the campus or an early college high school under a plan approved by the commissioner; or
3. As a result of attendance requirements under Education Code 25.092, will be denied credit for one or more classes in which the students have been enrolled.

Education Code 29.0822

A district may apply to the commissioner to provide an OFSDP for students, in accordance with 19 Administrative Code 129.1027.

A board must approve the application. The board must include the OFSDP as an item on the regular agenda for a board meeting in compliance with 19 Administrative Code 129.1027(h)(2) before applying to operate an OFSDP. The application shall include the information described in 19 Administrative Code 129.1027.

19 TAC 129.1027(c)

Tutorial Services

A district may provide tutorial services at district schools. If a district provides tutorial services, it shall require a student whose grade in a subject for a reporting period is lower than the equivalent of 70 on a scale of 100 to attend tutorials. [See EC for provisions on loss of class time.]

A district may provide transportation services to accommodate students who are required to attend tutorials and who are eligible for regular transportation.

Education Code 29.084

**Basic Skills
Programs**

A district may apply to the commissioner for funding of basic skills programs for students in grade 9 who are at risk of not earning sufficient credit or who have not earned sufficient credit to advance to grade 10 and who fail to meet minimum skills levels established by the commissioner.

With the consent of a student's parent or guardian, a district may assign a student to the basic skills program.

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A basic skills program may not exceed 210 instructional days and must meet the requirements set forth at Education Code 29.086.

Education Code 29.086(a)

**After-School and
Summer Intensive
Mathematics and
Science Programs**

A district may provide an intensive after-school program or an intensive program during the period that school is recessed for the summer to provide mathematics and science instruction to:

1. Students who are not performing at grade level in mathematics or science to assist those students in performing at grade level;
2. Students who are not performing successfully in a mathematics course or science course to assist those students in successfully completing the course; or
3. Other students as determined by the district.

Before providing a program, a board must adopt a policy for:

1. Determining student eligibility for participating in the program that:
 - a. Prescribes the grade level or course a student must be enrolled in to be eligible; and
 - b. Provides for considering teacher recommendations in determining eligibility;
2. Ensuring that parents of or persons standing in parental relation to eligible students are provided notice of the program;
3. Ensuring that eligible students are encouraged to attend the program;
4. Ensuring that the program is offered at one or more locations in the district that are easily accessible to eligible students; and
5. Measuring student progress on completion of the program.

Education Code 29.088, .090; 19 TAC 102.1041

**Mentoring Services
Program**

A district may provide a mentoring services program to students at risk of dropping out of school. A board may arrange for any public or nonprofit community-based organization to come to the district's schools and implement the program.

A board shall obtain the consent of a student's parent or guardian before allowing the student to participate in the program.

Education Code 29.089

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**Accelerated Reading
Instruction Program**

A district shall implement an accelerated reading instruction program that provides reading instruction that addresses reading deficiencies to each student in kindergarten, first grade, or second grade who is determined, on the basis of reading instrument results [see EKC], to be at risk for dyslexia or other reading difficulties. The district shall determine the form, content, and timing of the program.

A district shall provide additional reading instruction and intervention to each student given the seventh grade reading assessment [see EKC], as appropriate to improve the student's reading skills in the relevant areas identified through the assessment instrument.

Education Code 28.006(g), (g-1)

**College Preparatory
Courses**

Each district shall partner with at least one institution of higher education to develop and provide courses in college preparatory mathematics and English language arts. The courses must be designed:

1. For students at the 12th grade level whose performance on:
 - a. An end-of-course assessment instrument required under Education Code 39.023(c) does not meet college readiness standards; or
 - b. Coursework, a college entrance examination, or an assessment instrument designated under Education Code 51.334 [Texas Success Initiative (TSI) assessment] indicates that the student is not ready to perform entry-level college coursework; and
2. To prepare students for success in entry-level college courses.

A course must be provided on the campus of the high school offering the course or through distance learning or as an online course provided through an institution of higher education with which the district partners.

Faculty

Appropriate faculty of each high school offering courses and appropriate faculty of each institution of higher education with which the district partners shall meet regularly as necessary to ensure that each course is aligned with college readiness expectations.

Notice

Each district shall provide a notice to each eligible student and the student's parent or guardian regarding the benefits of enrolling in a course.

Credit Earned

A student who successfully completes an English language arts course may use the credit earned toward satisfying the advanced

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English language arts curriculum requirement for the foundation high school program under Education Code 28.025(b-1)(1). A student who successfully completes a mathematics course may use the credit earned in the course toward satisfying an advanced mathematics curriculum requirement under Education Code 28.025 after completion of the mathematics curriculum requirements for the foundation high school program under Education Code 28.025(b-1)(2).

Dual Credit A course may be offered for dual credit at the discretion of the institution of higher education with which a district partners. [See EHDD]

Instructional
Materials Each district, in consultation with each institution of higher education with which the district partners, shall develop or purchase instructional materials for a course consistent with Education Code Chapter 31. The instructional materials must include technology resources that enhance the effectiveness of the course and draw on established best practices.

Education Code 28.014

End-of-Course
Exam A student enrolled in a college preparatory mathematics or English language arts course under Education Code 28.014 who satisfies the TSI college readiness benchmarks on an assessment instrument administered at the end of the course satisfies the requirements concerning and is exempt from the administration of the Algebra I or the English I and English II end-of-course assessment instruments, as applicable, as prescribed by Education Code 39.023(c) [see EKB], even if the student did not perform satisfactorily on a previous administration of the applicable end-of-course assessment instrument. A student who fails to perform satisfactorily on the assessment instrument may retake that assessment instrument or may take the appropriate end-of-course assessment instrument. *Education Code 39.025(a-1)*

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**Accelerated
Instruction in Grades
3–8**

Each time a student fails to perform satisfactorily on a state assessment instrument in the third, fourth, fifth, sixth, seventh, or eighth grade [see EKB], the district in which the student attends school shall provide to the student accelerated instruction in the applicable subject area during the subsequent summer or school year and either:

1. Allow the student to be assigned a classroom teacher who is certified as a master, exemplary, or recognized teacher under the local optional teacher designation system [see DEAA] for the subsequent school year in the applicable subject area; or
2. Provide the student supplemental instruction under Education Code 28.0211(a-4) [see below].

Education Code 28.0211(a-1)

**Participation
Requirements**

Supplemental accelerated instruction may require a student to participate before or after normal school hours and may include participation at times of the year outside normal school operations. 19 TAC 104.1001(c)

In providing accelerated instruction, a district may not remove a student, except under circumstances for which a student enrolled in the same grade level who is not receiving accelerated instruction would be removed, from:

1. Instruction in the foundation curriculum and enrichment curriculum adopted under Education Code 28.002 [see EHA series] for the grade level in which the student is enrolled; or
2. Recess or other physical activity that is available to other students enrolled in the same grade level.

Education Code 28.0211(a-3)

The foundation curriculum includes English language arts, mathematics, science, and social studies. Courses in the enrichment curriculum include languages other than English; health, with emphasis on physical health, proper nutrition, and exercise; mental health, including instruction about mental health conditions, substance abuse, skills to manage emotions, establishing and maintaining positive relationships, and responsible decision making; suicide prevention; physical education; fine arts; career and technical education; technology applications; religious literature; and personal financial literacy.

In the event that a school week is three or less instructional days, the school is exempt from meeting the requirement of meeting once per week for supplemental accelerated instruction. [See Sup-

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plemental Instruction Requirements for Certain Funding, item 3, below.]

19 TAC 104.1001(c)

ARD Committee
Determination

For a student served by special education who does not perform satisfactorily on an assessment instrument administered under Education Code 39.023(a) [see EKB], the student's admission, review, and dismissal (ARD) committee must determine the manner in which the student will engage in supplemental accelerated instruction. ARD committees must consider the individual needs of a student with a disability when determining the manner in which supplemental accelerated instruction is to be provided to the student. If supplemental accelerated instruction is to be provided to the student, the supplemental accelerated instruction must meet the requirements outlined in this subsection unless the ARD committee specifically determines that some or all of the requirements for supplemental accelerated instruction would deny the student access to a FAPE. *19 TAC 104.1001(b)(3)*

Supplemental
Instruction
Requirements for
Certain Funding

If a district receives funding under Education Code 29.0881, the Coronavirus Response and Relief Supplemental Appropriations Act, 2021 (Div. M, Pub. L. No. 116-260), or the American Rescue Plan Act of 2021 (Pub. L. No. 117-2), then supplemental instruction provided by a district must:

1. Include targeted instruction in the essential knowledge and skills for the applicable grade levels and subject area;
2. Be provided in addition to instruction normally provided to students in the grade level in which the student is enrolled;
3. Be provided for no less than 30 total hours during the subsequent summer or school year and, unless the instruction is provided fully during summer, include instruction no less than once per week during the school year;
4. Be designed to assist the student in achieving satisfactory performance in the applicable grade level and subject area;
5. Include effective instructional materials designed for supplemental instruction;
6. Be provided to a student individually or in a group of no more than three students, unless the parent or guardian of each student in the group authorizes a larger group;
7. Be provided by a person with training in the applicable instructional materials for the supplemental instruction and under the oversight of the district; and

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8. To the extent possible, be provided by one person for the entirety of the student's supplemental instruction period.

Education Code 28.0211(a-4)

Supplemental
Accelerated
Instruction
Requirements

Supplemental accelerated instruction shall be based on, but not limited to, targeted instruction in the essential knowledge and skills for the applicable grade levels and subject areas and be provided by a person with training in the applicable instructional materials for the supplemental accelerated instruction and under the oversight of the school district. Supplemental accelerated instruction shall be provided as outlined in items 2–5 and 8 (above), to a student individually or in a group of no more than three students, unless the parent or guardian of each student in the group authorizes a larger group. *19 TAC 104.1001(d)*

Transportation

A district shall provide students required to attend the accelerated programs described above with transportation to those programs if the programs occur outside of regular school hours. *Education Code 28.0211(j)*

Notice to Parents of
Performance and
Accelerated
Instruction

Whenever a district is required to notify a parent or guardian about the requirements related to promotion and accelerated instruction, the district shall make a good-faith effort to ensure that the notice is provided either in person or by regular mail, is clear and easy to understand, and is written in English or in the parent or guardian's native language. *Education Code 28.0211(h)*

**Assessments Not
Required**

Education Code 28.0211 does not require the administration of a fifth or eighth grade assessment instrument in a subject under Education Code 39.023(a) to a student enrolled in the fifth or eighth grade, as applicable, if the student:

1. Is enrolled in a course in the subject intended for students above the student's grade level and will be administered an assessment instrument adopted or developed under Education Code 39.023(a) [see EKB] that aligns with the curriculum for the course in which the student is enrolled; or
2. Is enrolled in a course in the subject for which the student will receive high school academic credit and will be administered an end-of-course (EOC) assessment instrument [see EKB] for the course.

Notwithstanding any other provision of Education Code 28.0211, the student may not be denied promotion on the basis of failure to perform satisfactorily on an assessment instrument not required to be administered to the student, nor may a student in grade 5 or grade 8 be denied promotion to the next grade on the basis of fail-

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ure to perform satisfactorily on a reading or mathematics assessment instrument intended for use above the student's grade level.

Education Code 28.0211(o)–(p)

**Accelerated
Instruction After
EOC Assessments**

A district shall provide accelerated instruction to an enrolled student who has taken an EOC assessment instrument and has not performed satisfactorily or who is at risk of dropping out of school.

A district shall offer before the next scheduled administration of the assessment instrument, without cost to the student, additional accelerated instruction to each student in any subject in which the student failed to perform satisfactorily on an end-of-course assessment instrument required for graduation.

A district that is required to provide accelerated instruction must separately budget sufficient funds for that purpose. [See CE]

A district shall evaluate the effectiveness of accelerated instruction programs and annually hold a public hearing to consider the results.

Education Code 29.081(b), (b-1), (b-2), (b-3), 39.025(b-1)

Each time a student fails to perform satisfactorily on an assessment instrument administered under Education Code 39.023(c), the district in which the student attends school shall provide to the student accelerated instruction in the applicable subject area.

Accelerated instruction may require participation of the student before or after normal school hours and may include participation at times of the year outside normal school operations and must comply with the requirements for accelerated instruction provided under Education Code 28.0211 [see above].

Education Code 28.0217

Effectiveness

A district shall evaluate and document the effectiveness of the accelerated instruction in reducing any disparity in performance on state assessment instruments or disparity in the rates of high school completion between students at risk of dropping out of school and all other district students. *Education Code 29.081(c)*

**No Available Test
Score**

The superintendent of each district shall establish procedures to ensure that each eligible student who is absent or does not receive a test score for any test administration shall receive appropriate supplemental accelerated instruction as warranted on an individual student basis. *19 TAC 104.1001(b)(4)*

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**Accelerated
Learning Committee**

A district shall establish an accelerated learning committee for each student who does not perform satisfactorily on the following state assessment instruments [see EKB]:

1. The third grade mathematics or reading assessment;
2. The fifth grade mathematics or reading assessment; or
3. The eighth grade mathematics or reading assessment.

Education Code 28.0211(a)

Composition

The accelerated learning committee shall be composed of the principal or the principal's designee, the student's parent or guardian, and the teacher of the subject of an assessment instrument on which the student failed to perform satisfactorily. The district shall notify the parent or guardian of the time and place for convening the accelerated learning committee and the purpose of the committee. *Education Code 28.0211(c)*

If a student is changing campuses, the committee must include the receiving principal or designee, the sending principal or designee, the receiving content teacher or designee, and the sending content teacher or designee. *19 TAC 104.1001(e)(1)*

Educational Plan

An accelerated learning committee shall, not later than the start of the subsequent school year, develop an educational plan for the student that provides the necessary accelerated instruction to enable the student to perform at the appropriate grade level by the conclusion of the school year. The educational plan must be documented in writing, and a copy must be provided to the student's parent or guardian.

During the school year, the student shall be monitored to ensure that the student is progressing in accordance with the educational plan. The district shall administer to the student the assessment instrument for the grade level in which the student is placed at the time the district regularly administers the assessment instruments for that school year.

The board shall adopt a policy consistent with the grievance procedure adopted under Education Code 26.011 [see FNG] to allow a parent to contest the content or implementation of an educational plan.

Education Code 28.0211(f)–(f-3)

Failure in a
Subsequent School
Year

If a student who fails to perform satisfactorily on the third, fifth, or eighth grade math or reading assessment fails in the subsequent school year to perform satisfactorily on an assessment instrument in the same subject, the superintendent, or the superintendent's

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designee, shall meet with the student's accelerated learning committee to:

1. Identify the reason the student did not perform satisfactorily; and
2. Determine, in order to ensure the student performs satisfactorily on the assessment instrument at the next administration of the assessment instrument, whether the educational plan developed for the student must be modified to provide the necessary accelerated instruction for that student and any additional resources are required for that student.

The superintendent's designee may be an employee of a regional education service center and may not be a person who served on the student's accelerated learning committee.

Education Code 28.0211(f-4)–(f-5)

ARD Determination
for Grades 3, 5, and
8

The ARD committee of a student who does not perform satisfactorily on a third, fifth, or eighth grade math or reading assessment must meet to determine the manner in which the student will participate in an accelerated instruction program. *Education Code 28.0211(i)*

*Students Who
Meet Criteria for
the Alternative
Assessment*

The ARD committee must serve as the accelerated learning committee for students who meet the criteria for participation in alternative assessment instruments under Education Code 39.023(b) [see EKB], who do not perform satisfactorily on a mathematics or reading assessment instrument in grade 3, 5, or 8. The ARD committee must determine the manner in which the student will participate in supplemental accelerated instruction; however, the requirements for supplemental accelerated instruction described by 19 Administrative Code 104.1001(b) do not apply.

*ARD Committee
Responsibilities*

In serving as the accelerated learning committee for a student served by special education, the ARD committee must meet and develop a plan [see Education Plan, above] to determine the manner in which the student will participate in supplemental accelerated instruction, and this meeting must include the required members of a properly constituted ARD committee [see EHBAB].

When the ARD committee for a student served by special education serves as the accelerated learning committee, efforts must be taken to ensure parental participation as specified within the requirements of 19 Administrative Code 89.1050(d) and 34 Code of Federal Regulations 300.322 [see EHBAB].

The ARD committee, serving as the accelerated learning committee, must document decisions regarding supplemental accelerated

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instruction in writing and a copy must be provided to the student's parent or guardian. This documentation may either be included in ARD deliberations or as a supplemental attachment to the student's individualized education program.

*Dispute
Resolution*

A parent or guardian of a student served by special education may use a dispute resolution mechanism specified in 19 Administrative Code 89.1150 [see EHBAE] to resolve any dispute between the parent and a public education agency relating to the identification, evaluation, or educational placement of or the provision of a free appropriate public education (FAPE) to a student with a disability. If a parent or guardian of a student served by special education does not agree with the decision of the ARD committee serving as the accelerated learning committee regarding supplemental accelerated instruction, the parent or guardian may follow the district grievance policy [see FNG].

19 TAC 104.1001(f)

Parent Request

Each district shall establish a process allowing for the parent or guardian of a student who fails to perform satisfactorily on a third, fifth, or eighth grade math or reading assessment to make a request for district consideration that the student be assigned to a particular classroom teacher in the applicable subject area for the subsequent school year, if more than one classroom teacher is available. *Education Code 28.0211(a-5); 19 TAC 104.1001(g)*

Classroom
Assignment

A student who fails to perform satisfactorily on a third, fifth, or eighth grade math or reading assessment and is promoted to the next grade level must be assigned in the subsequent school year in each subject in which the student failed to perform satisfactorily on the applicable assessment instrument to an appropriately certified teacher who meets all state and federal qualifications to teach that subject and grade.

In a manner consistent with federal law and notwithstanding any other law, the commissioner may waive the requirement regarding the assignment of a student to an appropriately certified classroom teacher on the request of a district.

Education Code 28.0211(n)–(n-1)

Students who are deaf or hard of hearing must have an education in which their unique communication mode is respected, used, and developed to an appropriate level of proficiency. *Education Code 29.303*

Personnel

A student who is deaf or hard of hearing must have an education in which teachers, psychologists, speech therapists, progress assessors, administrators, and others involved in education understand the unique nature of deafness and the hard-of-hearing condition. A teacher of deaf or hard-of-hearing students either must be proficient in appropriate language modes or use an interpreter certified in appropriate language modes if certification is available. Regular and special personnel who work with students who are deaf or hard of hearing must be adequately prepared to provide educational instruction and services to those students.

The district shall employ or provide access to appropriate qualified staff with proficient communications skills, consistent with credentialing requirements, to fulfill the responsibilities of the district and shall make positive efforts to employ qualified individuals with disabilities.

Education Code 29.304

Involvement of Others

Students who are deaf or hard of hearing must have an education in which parents or legal guardians and advocates for parents or legal guardians are involved in determining the extent, content, and purpose of programs. Other individuals may be involved at the discretion of parents or legal guardians or the district. *Education Code 29.306*

Students who are deaf or hard of hearing shall be given the opportunity to be exposed to deaf or hard-of-hearing role models. *Education Code 29.307*

Advisory Committee

If the district has students who are deaf or hard of hearing, it shall include in its local special education advisory committee persons who are deaf or hard of hearing and parents or students who are deaf or hard of hearing, if practicable. *Education Code 29.309*

Assessment

The district shall not discriminate on the basis of race, culture, or sex when selecting and administering procedures and materials for assessment and placement of students who are deaf or hard of hearing. *Education Code 29.310(a)*

Placement

A single assessment instrument may not be the sole criterion for determining the placement of a student who is deaf or hard of hearing. *Education Code 29.310(b)*

Procedures and materials for the assessment and placement of a student who is deaf or hard of hearing shall be in the student's preferred mode of communication. All other procedures and materials

used with any student who is deaf or hard of hearing and who has limited English proficiency shall be in the student's preferred mode of communication. *Education Code 29.310(c)*

Deaf or Hard-of-Hearing Programs

Programs for students who are deaf or hard of hearing must be coordinated with other public and private agencies, including agencies operating early childhood intervention programs, preschools, agencies operating child development programs, nonpublic non-sectarian schools, agencies operating regional occupational centers and programs, and the Texas School for the Deaf. The programs must also be coordinated with postsecondary and adult programs for persons who are deaf or hard of hearing. *Education Code 29.311*

Counseling

Appropriate psychological counseling services for a student who is deaf or hard of hearing shall be made available at the student's school site in the student's primary mode of communication. Appropriate auditory systems shall be used with students who are hard of hearing, if required by the admission, review, and dismissal (ARD) committee. *Education Code 29.312*

Evaluation

The district must provide continuous evaluation of the effectiveness of programs for students who are deaf or hard of hearing. If practicable, the evaluations shall follow program excellence indicators established by TEA. *Education Code 29.313*

Transition to Regular Class

In addition to satisfying requirements under state and federal law for vocational training, the district shall develop and implement a transition plan for transition of students who are deaf or hard of hearing into a regular class program if the students are to be transferred from a special class or center or from a nonpublic, nonsectarian school into a regular class for any part of the school day. The transition plan must provide for activities to integrate the students into the regular education program and to support the transition of the students from the special education program into the regular education program. *Education Code 29.314*

Regional Day School Programs for the Deaf

In accordance with Education Code 30.081 through 30.087, a district shall have access to regional day school programs for the deaf operated by districts at sites previously established by the State Board of Education. Any student who is deaf or hard of hearing with a disability that severely impairs processing linguistic information through hearing, even with recommended amplification, and that adversely affects educational performance shall be eligible for consideration for the Regional Day School Program for the Deaf, subject to the ARD committee recommendations. *19 TAC 89.1080*

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Adult Education	A district must provide an adult education program designed to meet the education and training needs of adults to the extent possible using available public and private resources. Bilingual education must be used to instruct students who do not function satisfactorily in English whenever it is appropriate for those students' optimum development. <i>Labor Code 315.003</i>
Essential Program Components	An Adult Education and Literacy (AEL) grant recipient shall ensure that essential program components are provided as outlined in the grant application for statewide AEL funds, which include the components described by 40 Administrative Code 805.4. <i>40 TAC 805.4</i>
Staff Qualifications	AEL instructional aides, administrative, data entry, proctoring staff, and staff providing support or employment services to students shall have at least a high school diploma or a high school equivalency certificate. AEL directors, supervisors, and staff that oversee program assessment services and/or overall program accountability, and instructors in the content areas of reading, writing, mathematics, and English language acquisition, including substitutes, shall possess at least a bachelor's degree. Requests for exemptions for staff qualification requirements in individual cases may be submitted to the Texas Workforce Commission for approval. The exemption shall include a justification outlining extenuating circumstances and shall be submitted and approved prior to an individual being placed in the position in question.
Professional Development	The district shall comply with the program requirements for professional development in accordance with 40 Administrative Code 805.21. Records of staff qualifications and professional development shall be maintained by each grant recipient and shall be available for monitoring. <i>40 TAC 805.21</i>
Tuition and Fees	Tuition and fees shall not be charged unless a district is statutorily authorized to do so. Funds generated by tuition and fees shall be used for the AEL instructional programs and must be expended before federal and state grant funds, in accordance with 2 Code of Federal Regulations 200.305(b)(5). <i>40 TAC 805.45</i>
Reimbursement for Community Education	If a board elects to provide community education for all age groups, it may be eligible for reimbursement for the costs of the program. In order to receive reimbursement, it must submit an application in accordance with TEA rules and reimbursement shall be made to the extent authorized.

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Conditions

A district will receive such reimbursement only if it has achieved the level of community services prescribed by TEA in the current or preceding year.

Education Code 29.256

Innovative Courses

A district may offer innovative courses to enable students to master knowledge, skills, and competencies not included in the essential knowledge and skills of the required curriculum. Applications shall not be approved if the proposed course significantly duplicates the content of a Texas Essential Knowledge and Skills (TEKS)-based course or can reasonably be taught within an existing TEKS-based course.

To request approval for an innovative course from the State Board of Education or the commissioner, a district or organization must submit a request for approval at least six months before planned implementation. The request must address the elements listed at 19 Administrative Code 74.27(a)(4).

To request approval from the commissioner for a career and technical education innovative course, the applying school district or organization must submit with its request for approval evidence that the course is aligned with state and/or regional labor market data.

To request approval of a new innovative course, the applying district or organization must submit with its request for approval evidence that the course has been successfully piloted in its entirety in at least one school in the state of Texas.

With the approval of the board, a district may offer, without modifications, any state-approved innovative course.

19 TAC 74.27(a)(3)–(7)

Magnet Schools or Programs

A district may operate a magnet program, academy, or other innovative program to serve student populations with specialized interests and aptitudes. *19 TAC 74.22(b)*

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Award of Credit	The award of credit for a course affirms that a student has satisfactorily met state and local requirements. Any course for which credit is awarded must be provided according to 19 TAC 74.26(a)(1) and (a)(2) [see FDA]. <i>19 TAC 74.26(a)</i>
Early Award of Credit	A district may offer courses designated for grades 9–12 in earlier grade levels. A course must be considered completed and credit must be awarded if the student has demonstrated achievement by meeting the standard requirements of the course, including demonstrated proficiency in the subject matter, regardless of the time the student received instruction in the course or the grade level at which proficiency was attained. The academic achievement record (transcript) shall reflect that students have satisfactorily completed courses at earlier grade levels from grades 9–12 and have been awarded state graduation credits. <i>19 TAC 74.26(b)</i>
Partial Award	In accordance with a district's local policy, a student who is able to successfully complete only half of a course can be awarded credit proportionately. <i>19 TAC 74.26(d)</i> A district shall award credit proportionately to a student who is homeless or in substitute care who successfully completes only half of a course. <i>19 TAC 74.26(e)</i>
Attendance for Credit or Final Grade	Unless credit is awarded by the attendance committee or regained in accordance with a principal's plan [see FEC], a student in any grade level from kindergarten through grade 12 may not be given credit or a final grade for a class unless the student is in attendance for at least 90 percent of the days the class is offered. <i>Education Code 25.092</i>
Homeless or Substitute Care	A district shall adopt a local policy to ensure credit, including proportionate credit, has been awarded appropriately to a student who is homeless or in substitute care for coursework completed prior to the student enrolling in or transferring to the district in accordance with 19 Administrative Code 74.26 (Award of Credit). A district must ensure that student records or transcripts provided by the previous district or charter school are evaluated promptly and are complete, accurate, and up to date. The receiving district must develop, maintain, and regularly update local records and documentation, including transcripts if applicable, for a student who is homeless or in substitute care. A district must ensure that the records or transcripts of a student who is homeless or in substitute care and transferring from out of state, out of country, or a Texas nonpublic school are evaluated and the award of credit is determined in a timely manner, as required by 19 Administrative Code 74.26(a)(2). [See FDA]

A district must award credit proportionately to a student who is homeless or in substitute care who successfully completes only half of a course. Districts must evaluate the student record upon a student's enrollment and ensure that proportionate credit has been awarded appropriately.

If a district determines that there are courses in which a student was enrolled but for which the student has not earned credit, the district may use a variety of methods to determine whether the student may be eligible for full or proportionate credit for coursework completed. The award of credit must be based on demonstrated proficiency in all state and local requirements for a course in accordance with 19 Administrative Code 74.26.

A district must provide opportunities for a student who is homeless or in substitute care who enrolls in the district after the start of the school year to be administered credit by examination at any point during the school year, as required by 19 Administrative Code 74.24 (Credit by Examination) [see EHDB and EHDC].

Districts must:

1. Develop processes for students who have credit deficits or incomplete coursework that would impede on-time promotion or graduation to earn credit and implement appropriate academic interventions to address any credit deficiencies identified;
2. Develop and administer a personal graduation plan in accordance with Education Code 28.0212 (see EIF) for each student in junior high or middle school who is not likely to receive a high school diploma before the fifth school year following the student's enrollment in grade 9, as determined by the district, or does not perform satisfactorily on a state assessment instrument;
3. Review personal graduation plan options with each student entering grade 9 and with that student's parent or guardian as required by Education Code 28.02121 [see EIF]. Before the conclusion of the school year, the student and the student's parent or guardian must confirm and sign a personal graduation plan for the student;
4. Ensure that school staff actively engage with the student and the student's parent or guardian, as applicable, to develop a plan to recover credits if the student has credit deficits or incomplete coursework that would impede on-time promotion or graduation; and

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5. Comply with Education Code 28.025(i) [see EIF], concerning the award of diplomas for students who are homeless or in substitute care who are in grade 11 or 12.

19 TAC 89.1607

[For information on transition assistance for students who are homeless or in substitute care, including enrollment and placement in education programs and courses, see FFC.]

**Graduation
Requirements**

Credit for courses for high school graduation may be earned only if the student received a grade equivalent to 70 on a scale of 100, based upon the essential knowledge and skills of each course. Credit earned toward state graduation requirements in an accredited school district shall be transferable and must be accepted by any other school district in the state. *19 TAC 74.26(a)(1), (c)*

**Academic
Achievement Record**

Following guidelines developed by the commissioner of education, a district shall use an academic achievement record (transcript) form that includes student demographics, school data, student data, and the record of courses and credits earned.

The academic achievement record (transcript) shall serve as the academic record for each student and shall be maintained permanently by a district.

Any credit earned by a student must be recorded on the academic achievement record (transcript), regardless of when the credit was earned.

A student's performance on a state assessment, including an end-of-course assessment instrument required under Education Code 39.023(c) [see EKB], must be included in the student's academic achievement record (transcript).

Copies of the record shall be made available to students transferring to another district. A district shall respond promptly to all requests for student records from receiving districts. [See also FD, FDA, and FL]

Education Code 28.025(e), 39.023(c-5); 19 TAC 74.5(b)–(d)

Transcript Seals

Students who complete high school graduation requirements shall have attached to the academic achievement record (transcript) a seal approved by the State Board of Education. *19 TAC 74.5(e)*

Endorsement

Students who complete the requirements for an endorsement shall have the endorsement clearly indicated on the academic achievement record (transcript).

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Performance Acknowledgment	Students who earn a performance acknowledgment shall have the performance acknowledgment clearly indicated on the academic achievement record (transcript).
Distinguished Level of Achievement	Students who earn the distinguished level of achievement shall have the distinguished level of achievement clearly indicated on the academic achievement record (transcript).
Speech Requirements	Students who demonstrate proficiency in speech as specified in 19 Administrative Code 74.11 shall have completion of the speech requirement clearly indicated on the academic achievement record (transcript).
CPR	Students who complete the required instruction in cardiopulmonary resuscitation (CPR) as specified in 19 Administrative Code 74.38 in grade 9, 10, 11, or 12 shall have completion of the CPR instruction clearly indicated on the academic achievement record (transcript).
Proper Interaction with Peace Officers	Students who complete the required instruction on proper interaction with peace officers shall have completion of the instruction clearly indicated on the academic achievement record (transcript). A district shall clearly indicate on the academic achievement record the year in which the instruction was provided to the student.
Languages Other Than English	Students who satisfy a language other than English graduation credit requirement by successfully completing a dual language immersion program at an elementary school in accordance with 19 Administrative Code 74.12 shall have the credit clearly indicated on the academic achievement record (transcript).
FAFSA/TASFA Completion	A student who completes and submits a free application for federal student aid (FAFSA) or a Texas application for state financial aid (TASFA) or submits the Texas Education Agency-approved opt-out form shall have the completion of the financial aid application requirement clearly indicated on the academic achievement record. <i>Education Code 28.025; 19 TAC 74.5(f)–(m), .11(b), .39(e)</i>
Notation on Transcript or Diploma	A district shall ensure that each student's official transcript or diploma indicates whether the student has completed or is on schedule to complete: 1. The recommended or advanced high school curriculum; or 2. For a district that is covered by Education Code 56.304(f)(1) (unavailability of courses), the required portion of the recommended or advanced high school curriculum offered at the district's high school.

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The district must include this information on the student's transcript not later than the end of the student's junior year.

Education Code 56.308

Certificate of
Coursework
Completion

A student who completes all graduation requirements except for required end-of-course assessment instruments may be issued a certificate of coursework completion. The academic achievement record (transcript) shall include a notation of the date a certificate of completion was issued to the student. *19 TAC 74.5(n)* [See FMH for participation in the graduation ceremony.]

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State Assessment of Academic Skills

Every student receiving instruction in the essential knowledge and skills shall take the appropriate criterion-referenced assessments, as required by Education Code Chapter 39, Subchapter B [see Testing in Grades 3–8, below]. *Education Code 39.023(a), (c), (f); 19 TAC 101.5*

A student may not receive a high school diploma until the student has performed satisfactorily on end-of-course (EOC) assessment instruments [see End-of-Course Assessments, below]. *Education Code 39.025(a); 19 TAC 101.4001*

Emergent Bilingual Students

In grades 3–12, an emergent bilingual student, as defined by Education Code Chapter 29, Subchapter B, shall participate in the state assessment in accordance with commissioner rules at 19 Administrative Code Chapter 101, Subchapter AA. *Education Code 39.023(l), (m)* [See EKBA]

Special Education

The Texas Education Agency (TEA) shall develop or adopt appropriate criterion-referenced alternative assessment instruments to be administered to each student in a special education program for whom a state assessment instrument adopted under Education Code 39.023(a), even with allowable accommodations, would not provide an appropriate measure of student achievement, as determined by the student's admission, review, and dismissal (ARD) committee, including assessment instruments approved by the commissioner of education that measure growth. The assessment instruments developed or adopted, including the assessment instruments approved by the commissioner, must, to the extent allowed under federal law, provide a district with options for the assessment of students.

TEA may not adopt a performance standard that indicates that a student's performance on the alternate assessment does not meet standards if the lowest level of the assessment accurately represents the student's developmental level as determined by the student's ARD committee.

The student's ARD committee shall determine whether any allowable modification is necessary in administering to the student a required EOC assessment instrument under Education Code 39.023(c), and whether the student is required to achieve satisfactory performance on an EOC assessment instrument to receive a high school diploma.

Education Code 39.023(b)–(c), .025(a-4)

Military Dependents

If the student is a military dependent, the district shall incorporate procedures to accept:

1. Exit or EOC exams required for graduation from the sending state;
2. National norm-referenced achievement tests; or
3. Alternative testing, in lieu of testing requirements for graduation in the receiving state.

In the event the above alternatives cannot be accommodated by the receiving state for a military dependent transferring in his or her senior year, then Education Code 162.002 article VII, section C, shall apply.

*Substitute
Passing Standard*

The commissioner shall adopt a passing standard on one or more national norm-referenced achievement tests for purposes of permitting a qualified military dependent to meet that standard as a substitute for achieving a score on an assessment instrument otherwise required for graduation. The passing standard is available only for a student who enrolls in a public school in this state for the first time after completing the ninth grade or who reenrolls in a public school in this state at or above the grade 10 level after an absence of at least two years from the public schools of this state. Each passing standard in effect when a student first enrolls in a Texas public high school remains applicable to the student for the duration of the student's high school enrollment, regardless of any subsequent revision of the standard.

Education Code 162.002 art. VII [See EIF]

Administration

A district shall follow the test administration procedures established by TEA in the applicable test administration materials. A superintendent shall be responsible for administering tests. *19 TAC 101.25, .27*

Schedule

The commissioner shall specify the schedule for testing that is in compliance with Education Code 39.023(c-3) and supports reliable and valid assessments. Participation in University Interscholastic League (UIL) area, regional, or state competitions is prohibited on any days on which testing is scheduled between Monday and Thursday of the school week in which the primary administration of assessment instruments occurs.

The commissioner may provide alternate dates for the administration of tests required for a high school diploma to students who are migratory children and who are out of the state.

19 TAC 101.25

On request by a district, the commissioner may allow the district to administer an assessment instrument on the first instructional day

of a week if administering the assessment instrument on another instructional day would result in a significant administrative burden due to specific local conditions. *Education Code 39.023(c-3)*

***Alternate Test
Dates***

The commissioner shall consider requests from districts or campuses for alternate test dates on a case-by-case basis. Alternate test dates will only be allowed if the campus or district is closed on the day on which testing is scheduled or if there is an exceptional circumstance, defined below, that may affect a district's or campus's ability to administer an assessment or the students' performance on the assessment.

"Exceptional circumstances" include:

1. Inclement weather or natural disasters that would cause a district or campus to be closed or that would cause a small percentage of students to be in attendance on the day testing is scheduled;
2. Health epidemics that result in a large number of students being absent on the day of testing;
3. Death of a student or school official that may impact student performance; and
4. Sudden emergencies that occur on the day of testing or shortly before testing that may inhibit students from completing the assessments, such as a fire on campus, a bomb threat, an extended power outage, or a water main break.

If an alternate test date for primary test administration is approved, the commissioner may prohibit a district or campus from participating in UIL competition on the new test date if that is determined to be in the best interest of the district, campus, and students.

19 TAC 101.5003

**Test Administration
Training**

The commissioner may require training for district employees involved in the administration of the assessment instruments. The commissioner may only require for the employee at each district campus who oversees the administration of the assessment instruments to annually receive the training. The district employee who oversees test administration on a district campus may, with discretion, require other district employees involved in the administration of assessment instruments to repeat the training. *Education Code 39.0304(a), (b-1)–(b-2)*

**Notice to Parents
and Students**

A superintendent shall be responsible for the following in order to provide timely and full notification of graduation requirements:

1. Notifying each student and his or her parent or guardian in writing no later than the beginning of the student's seventh-grade year of the testing requirements for graduation;
2. Notifying each student in grades 7–12 new to the district and his or her parent or guardian in writing of the testing requirements for graduation; and
3. Notifying each student who shall take the tests required for graduation and his or her parent or guardian, as well as out-of-school individuals, of the dates, times, and locations of testing.

19 TAC 101.3012

**Testing in
Grades 3–8**

Except as provided below, all students, other than students who are assessed under Education Code 39.023(b) (alternative assessment instrument) or 39.023(l) (emergent bilingual students) or exempted under Education Code 39.027, shall be assessed in:

1. Mathematics, annually in grades 3–8;
2. Reading, annually in grades 3–8;
3. Social studies in grade 8;
4. Science in grades 5 and 8; and
5. Any other subject and grade required by federal law.

Education Code 39.023(a)

Exception

For purposes of federal accountability, a student shall not be administered a grade-level assessment if the student:

1. Is enrolled in a course or subject intended for students above the student's enrolled grade level and will be administered a grade-level assessment instrument developed under the list above that aligns with the curriculum for that course or subject within the same content area; or
2. Is enrolled in a course for high school credit in a subject intended for students above the student's enrolled grade level and will be administered an EOC assessment instrument that aligns with the curriculum for that course or subject within the same content area.

For purposes of federal accountability, a grade 3–8 student who is accelerated in mathematics, reading/language arts, or science and on schedule to complete the high school end-of-course assessments in that same content area prior to high school shall be assessed at least once in high school with the ACT or the SAT.

A student is only eligible to take an assessment instrument intended for use above the student's enrolled grade if the student is on schedule to complete instruction in the entire curriculum for that subject during the semester the assessment is administered.

A student in grade 5 or 8 described above may not be denied promotion on the basis of failure to perform satisfactorily on an assessment instrument not required to be administered to the student.

Education Code 28.0211(o)–(p), 39.023(a-2); 19 TAC 101.3011(a)(1)–(4)

Kindergarten
Assessment

An assessment instrument under Education Code 39.023 may not be administered to a kindergarten student except for the purpose of determining whether the student is entitled to the benefit of the Foundation School Program [see FD]. *Education Code 39.023(a-16)*

Prekindergarten
Assessment

Performance on an assessment instrument administered to students in prekindergarten may not be considered for any purpose related to Education Code Chapters 39 and 39A. *Education Code 39.0237*

Accommodations

Testing accommodations are permitted for any student unless they would make a particular test invalid. Decisions regarding testing accommodations shall take into consideration the needs of the student and the accommodations the student routinely receives in classroom instruction. Permissible testing accommodations shall be described in the appropriate test administration materials.

The committee established by a board to determine the placement of students with dyslexia or related disorders shall determine whether any allowable modification is necessary in administering an assessment to such a student.

A student's ARD committee shall determine the allowable accommodations and shall document them in the student's individualized education program (IEP). [See Special Education, above]

19 TAC 101.3013; Education Code 39.023(a)–(c), (n); 34 C.F.R. 300.320(a)(6)

**End-of-Course
Assessments**

Beginning with students first enrolled in grade 9 in the 2011–12 school year, a student enrolled in a course for which an EOC assessment exists as required by Education 39.023(c) shall take the appropriate assessment. *19 TAC 101.3021(a)*

TEA shall adopt EOC assessment instruments for secondary-level courses in Algebra I, biology, English I, English II, and United

States history. The Algebra I EOC assessment instrument must be administered with the aid of technology but may include one or more parts that prohibit the use of technology. The English I and English II EOC assessment instruments must each assess essential knowledge and skills in both reading and writing and must provide a single score. A district shall comply with State Board of Education rules regarding administration of the assessment instruments listed in this provision.

If a student is in a special education program, the student's ARD committee shall determine whether any allowable modification is necessary in administering to the student an assessment instrument required under this provision.

Education Code 39.023(c)

Students Enrolled
Below High School
Level

Beginning in the 2011–12 school year, a student in grade 8 or lower who takes a high school course for credit is required to take the applicable EOC assessment. The EOC assessment result shall be applied toward the student's assessment graduation requirements, as specified in 19 Administrative Code 101.3022. *19 TAC 101.3021(d)*

Assessment
Requirements for
Graduation

A student must meet satisfactory performance on an EOC assessment listed in Education Code 39.023(c) in order to be eligible to receive a Texas diploma, except as described below at Exceptions, Credits Earned Prior to Enrollment, Individual Graduation Committee, and Special Education.

The standard in place when a student first takes an EOC assessment is the standard that will be maintained throughout the student's school career.

Exceptions

English I or
English II

A student who was administered separate reading and writing EOC assessments under Education Code 39.023(c), for the English I or English II course has met that course's assessment graduation requirement if the student has:

1. Achieved satisfactory performance on either the reading or writing EOC assessment for that course;
2. Met at least the minimum score on the other EOC assessment for that course; and
3. Achieved an overall scale score of 3750 or greater when the scale scores for reading and writing are combined for that course.

Exceptions related to English I also apply to emergent bilingual students who meet the criteria in 19 Administrative Code 101.1007.
[See EKBA]

19 TAC 101.3022(a)–(c)

Credits Earned
Prior to
Enrollment

If a student earned high school credit for a course with an EOC assessment prior to enrollment in a Texas public school district and the credit has been accepted by a Texas public school district, or a student completed a course for Texas high school credit in a course with an EOC assessment prior to the 2011–12 spring administration, the student is not required to take the corresponding EOC assessment. *19 TAC 101.3021(e)*

Substitute
Assessments

The commissioner adopts certain assessments as substitute assessments that a student may use in place of a corresponding EOC assessment to meet the student's assessment graduation requirements. A satisfactory score on an approved assessment may be used in place of only one specific EOC assessment, except as provided by 19 Administrative Code 101.4002(d)(1) (student who qualifies for use of the Texas Success Initiative (TSI) as a substitute assessment and is enrolled in certain college preparatory courses).

A student at any grade level is eligible to use a substitute assessment as provided in the commissioner's chart at 19 Administrative Code 101.4002(b) if the student:

1. Was administered an approved substitute assessment for an equivalent course in which the student was enrolled;
2. Received a satisfactory score on the substitute assessment as determined by the commissioner and provided in the chart at 19 Administrative Code 101.4002(b); and
3. Using a Texas Success Initiative Assessment (TSIA) or a Texas Success Initiative Assessment, Version 2.0 (TSIA2) also meets the additional criteria of 19 Administrative Code 101.4002(d).

*TSI Additional
Criteria*

A student must meet the criteria established in 19 Administrative Code 101.4002(d) in order to qualify to use TSIA or TSIA2 as a substitute assessment.

Accountability
Testing

A student electing to substitute an assessment for graduation purposes must still take the corresponding EOC assessment required under Education Code 39.023(c) at least once for accountability purposes. If a student sits for an EOC assessment, a district may not void or invalidate the test in lieu of a substitute assessment.

A student who fails to perform satisfactorily on a PSAT, PLAN, or Aspire test (or any versions of these tests) as indicated in the chart in 19 Administrative Code 101.4003(b) must take the appropriate EOC assessment required under Education Code 39.023(c). However, a student who does not receive a passing score on the EOC assessment and retakes a PSAT, PLAN, or Aspire test (or any versions of these tests) is eligible to meet the requirements specified in 19 Administrative Code 101.4002(c).

19 TAC 101.4002

*Verification of
Results*

An eligible student is responsible for providing a district an official copy of the student's scores from the substitute assessment.

Upon receipt of official results of an approved substitute assessment, a district must:

1. Verify the student's score on the substitute assessment; and
2. Determine whether the student met the performance standard required to qualify for a public high school diploma in Texas as established by the commissioner.

19 TAC 101.4005

*Satisfactory
Performance*

A student is required to achieve a scale score that indicates satisfactory performance, as determined by the commissioner on each EOC assessment instrument administered to the student. *Education Code 39.025(a)*

*Individual
Graduation
Committee*

A student in grade 11 or 12 who has failed to comply with the EOC assessment instrument performance requirements under Education Code 39.025 for not more than two courses may qualify to graduate on the basis of a review by an individual graduation committee (IGC). [See EIF] *Education Code 28.0258, 39.025(a-5)*

A student may not graduate under an IGC if the student did not take each required EOC assessment or an approved substitute assessment for each course in which the student was enrolled in a Texas public school for which there is an EOC assessment. A district shall determine whether the student took each required EOC assessment or an approved substitute assessment. For purposes of this provision only, a student who does not make an attempt to take all required EOC assessments may not qualify to graduate by means of an individual graduation committee.

Notwithstanding any action taken by a student's individual graduation committee, a district must provide a student an opportunity to retake an EOC assessment under Education Code 39.023(c) if the student has not previously achieved satisfactory performance on

an assessment for that course. A student is not required to retake a course in order to be administered a retest of an EOC assessment.

19 TAC 101.3022(e)(1), (3)

For provisions related to an IGC and emergent bilingual students, see EKBA.

Special Education

A student receiving special education services is not subject to the IGC requirements in Education Code 28.0258. As provided in 19 Administrative Code 89.1070 (Graduation Requirements) and 19 Administrative Code 101.3023 (Participation and Graduation Assessment Requirements for Students Receiving Special Education Services), a student's ARD committee determines whether a student is required to achieve satisfactory performance on an EOC assessment to graduate. [See EIF]

A student dismissed from a special education program who achieved satisfactory performance on an alternate EOC assessment while enrolled in a special education program is not required to take and achieve satisfactory performance on the general EOC assessment to graduate. A student who took an EOC assessment while enrolled in a special education program is not required to retake and achieve satisfactory performance on the EOC assessment if the student's ARD committee determined that the student was not required to achieve satisfactory performance on the EOC assessment to graduate. A student dismissed from a special education program must achieve satisfactory performance on any remaining EOC assessments that the student is required to take. If the student fails to achieve satisfactory performance on no more than two of the remaining EOC assessments, the student is eligible for IGC review under Education Code 28.0258 and is subject to the IGC provisions above. [See Individual Graduation Committee, above]

19 TAC 101.3022(f)

For more information on graduation requirements for special education students, see EIF.

Credit by
Examination

An EOC assessment administered under Education Code 39.023(c) cannot be used for purposes of credit by examination under 19 Administrative Code 74.24. [See EHDB, EHDC] *19 TAC 101.3021(c)*

Additional State
Assessments

TEA may adopt EOC assessment instruments for courses not listed in statute, as described above. A student's performance on these EOC assessment instruments is not subject to the perfor-

	mance requirements established for the statutory assessments. <i>Education Code 39.023(c-2)</i>
Retakes	Each time an EOC assessment instrument is administered, a student who failed to achieve a score requirement may retake the assessment instrument. [See Satisfactory Performance, above] A student is not required to retake a course as a condition of retaking an EOC assessment instrument. If a student failed a course but achieved satisfactory performance on the applicable EOC assessment, that student is not required to retake the assessment if the student is required to retake the course. <i>Education Code 39.025(b); 19 TAC 101.3021(f), .3022(d)</i>
Reporting Results	
To the Public	Overall student performance data, aggregated by ethnicity, sex, grade level, subject area, campus, and district, shall be made available to the public, with appropriate interpretations, at regularly scheduled meetings of a board, after receipt from TEA. The information shall not contain the names of individual students or teachers. <i>Education Code 39.030(b)</i>
To the Board	A superintendent shall accurately report all test results with appropriate interpretations to a board according to the schedule in the applicable test administration materials.
To Parents, Students, and Teachers	A district shall notify each of its students, his or her parent or guardian, and his or her teacher for that subject of test results, observing confidentiality requirements stated at Confidentiality of Results, below. All test results shall be included in each student's academic achievement record and shall be furnished for each student transferring to another district or charter school or private school. The scoring contractor will provide districts with the results of the machine-scorable assessments within a 21-day period following the close of the testing window. Upon receipt of the assessment results from the test contractor, a district shall disclose a student's assessment results to a student's teacher in the same subject area as the assessment for that school year. [See BQ series, FD, and FL] <i>19 TAC 101.3014(a)–(d)</i> TEA shall adopt a series of questions to be included in an EOC assessment instrument administered under Education Code 39.023(c) to be used for purposes of identifying students who are likely to succeed in an advanced high school course. A district shall notify a student who performs at a high level on the questions and the student's parent or guardian of the student's performance and

potential to succeed in an advanced high school course. A district may not require a student to perform at a particular level on the questions to be eligible to enroll in an advanced high school course. *Education Code 39.0233(b)*

Parents Right-to-
Know Under ESEA

As a condition of receiving assistance under Title I, Part A of the Elementary and Secondary Education Act (ESEA) (20 U.S.C. 6301 et seq.), a district shall provide to each individual parent of a child who is a student in such school, with respect to such student information on the level of achievement and academic growth of the student, if applicable and available, on each of the state academic assessments required under Part A. *20 U.S.C. 6312(e)(1)(B)(i)*

Parental Access

A parent is entitled to access to a copy of each state assessment instrument administered to the parent's child. This right of access does not apply, however, to those instruments or particular questions that are being field-tested by TEA. *Education Code 26.005, .006(a)(2), 39.023(e)*

Note: For information on instructional requirements for students who fail to perform satisfactorily on a state assessment instrument, see EHBC and EHBCA.

**Out-of-State
Transfers**

A district shall accurately report to TEA whether that student transferred into the district from out of state during the current school year.

Procedures for the reporting of out-of-state-transfer students to TEA shall be established in the applicable test administration materials. A district shall follow procedures specified in those test administration materials.

The assessment results of the out-of-state transfer students shall be reported separately to districts from the results of the district's other students in addition to the current reporting of assessment results for all students and other student subsets.

19 TAC 101.3014(e)

**Security and
Confidentiality**

All assessment instruments included in the student assessment program are considered secure, and the contents of these tests, including student information used or obtained in their administration, are confidential.

Districts and campuses and the superintendent and campus principals in each district and campus shall:

1. Implement and ensure compliance with state test administration procedures and training activities;

2. Notify TEA as soon as the district becomes aware of any alleged or suspected violation of the security or confidential integrity of a test [see Violations, below];
3. Report all confirmed testing violations to TEA within ten working days of the district becoming aware of the violation in accordance with the reporting process stipulated in the test administration materials;
4. Ensure that the only individuals with access to secure test materials are district employees who have:
 - a. Met the requirements to participate in the student assessment program;
 - b. Received training in test security and test administration procedures; and
 - c. Signed an oath affirming they understand their obligation to maintain and preserve the security and confidentiality of all state assessments and student information, acknowledge their responsibility to report any suspected testing violation, and are aware of the range of penalties that may result from a violation of test security and confidentiality or a departure from test administration procedures; and
5. Ensure the security of the test materials as required by 19 Administrative Code 101.3031(a)(2)(E).

19 TAC 101.3031(a)(1)–(2)

Violations

Violations of the security and confidential integrity of a test include:

1. Directly or indirectly assisting students with responses to test questions;
2. Tampering with student responses;
3. Falsifying holistic ratings or student responses;
4. Viewing secure test content before, during, or after an administration unless specifically authorized by TEA or by the procedures outlined in the test administration materials;
5. Discussing or disclosing secure test content or student responses;
6. Scoring students' tests, either formally or informally;

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STATE ASSESSMENT

EKB
(LEGAL)

7. Duplicating, recording, or electronically capturing confidential test content unless specifically authorized by TEA or by the procedures outlined in the test administration materials;
8. Responding to secure test questions;
9. Fraudulently exempting or preventing a student from participating in the administration of a required state assessment;
10. Receiving or providing unallowable assistance during calibration activities (e.g., taking notes, providing answer sheets, or sharing answers);
11. Encouraging or assisting an individual to engage in the conduct described above or in any other serious violation of security and confidentiality;
12. Failing to report to an appropriate authority that an individual has engaged or is suspected of engaging in the above conduct or in any other serious violation of security and confidentiality under this provision;
13. Failing to implement sufficient procedures to prevent student cheating; and
14. Failing to implement sufficient procedures to prevent alteration of test documents by anyone other than the student.

Consequences

If a district determines that a student has cheated or attempted to cheat on a state assessment either by providing or receiving direct assistance, the district shall invalidate the student's test results.

Any violation of test security or confidential integrity may result in TEA:

1. Invalidating student test results;
2. Referring certified educators to the State Board for Educator Certification (SBEC) for sanctions in accordance with 19 Administrative Code Chapter 247 (Educators' Code of Ethics) and Chapter 249 (Disciplinary Proceedings, Sanctions, and Contested Cases); and
3. Lowering the district's accreditation status or a district's or campus's accountability rating in accordance with Education Code 39.003(d), or appointment of a monitor, conservator, or management team to the district in accordance with Education Code Chapter 39A.

Test Administration
Procedures

Test administration procedures shall be delineated in the test administration materials provided to districts annually. Districts must

comply with all of the applicable requirements specified in the test administration materials.

Districts shall ensure that test coordinators and administrators receive training to ensure that testing personnel have the necessary skills and knowledge required to administer assessment instruments in a valid, standardized, and secure manner.

Records Retention

As part of test administration procedures, the commissioner shall require districts to maintain records related to the security of assessment instruments for five years.

19 TAC 101.3031(a)(3)–(d)

**Disciplinary Action
and Penalties**

SBEC may take disciplinary action against a person who has violated the security or integrity of any assessment required by Education Code Chapter 39, Subchapter B or has committed an act that is a departure from the test administration procedures established by the commissioner under 19 Administrative Code Chapter 101.

The superintendent and campus principal must develop procedures to ensure the security and confidentiality of the tests and will be responsible for notifying TEA in writing of conduct that violates the security or confidentiality of a test. Failure to report can subject the person responsible to the applicable penalties.

19 TAC 249.15(a)–(b), (g)(8)

Minimize Disruptions

In implementing the commissioner's procedures for the administration of assessment instruments adopted or developed under Education Code 39.023, including procedures designed to ensure the security of the assessment, a district shall minimize disruptions to school operations and the classroom environment. *Education Code 39.0301(a-1)*

**Confidentiality of
Results**

Individual student performance results are confidential and may be released only in accordance with the Family Educational Rights and Privacy Act of 1974. *Education Code 39.030(b)* [See FL and GBA]

ADMISSIONS

FD
(LEGAL)

General Eligibility

A board or its designee shall admit into the public schools of a district free of tuition all persons who are over five and younger than 21 years of age on September 1 of any school year in which admission is sought, and may admit a person who is at least 21 and under 26 for the purpose of completing the requirements for a high school diploma, if any of the following conditions exist:

Student and Parent

The person and either parent reside in the district.

Conservator

The person does not reside in the district, but one of the parents resides in the district and that parent is a joint managing conservator or the sole managing conservator or possessory conservator of the person.

Guardian or Person
Having Lawful
Control

The person and his or her guardian or other person having lawful control under an order of a court reside in the district.

Students Living
Separate and Apart

The person is under the age of 18 and has established a separate residence in the district apart from his or her parent, guardian, or other person having lawful control under an order of a court and has established that the person's presence in the district is not for the primary purpose of participation in extracurricular activities. A board is not required to admit such person, however, if the person has:

1. Engaged in conduct that resulted in removal to a disciplinary alternative education program or expulsion within the preceding year;
2. Engaged in delinquent conduct or "conduct in need of supervision" and is on probation or other conditional release for that conduct; or
3. Been convicted of a criminal offense and is on probation or other conditional release.

Education Code 25.001(a)–(b), (d)

Students Who Are
Homeless

The person is homeless. [See also FDC]

1. "Child who is homeless," "person who is homeless," and "student who is homeless" have the meaning assigned to the term homeless children and youths under the McKinney-Vento Homeless Assistance Act.
2. "Homeless children" under the McKinney-Vento Homeless Assistance Act, means children or youths who lack a fixed, regular, and adequate nighttime residence; and includes:

- a. Children who are sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason; are living in motels, hotels, trailer parks, or camping grounds due to the lack of alternative adequate accommodations; are living in emergency or transitional shelters; or are abandoned in hospitals;
- b. Children who have a primary nighttime residence that is a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings;
- c. Children who are living in cars, parks, public spaces, abandoned buildings, substandard housing, bus or train stations, or similar settings; and
- d. Migratory children living in circumstances described above. "Migratory child" means a child who made a qualifying move in the preceding 36 months:
 - (1) As a migratory agricultural worker or a migratory fisher; or
 - (2) With, or to join, a parent or spouse who is a migratory agricultural worker or a migratory fisher. [See EEB]

*Education Code 5.001(1-a), 25.001(b)(5); 20 U.S.C. 6399;
42 U.S.C. 11434a(2)*

[For information regarding the transfer of records and other transition requirements for a student who is homeless, see FFC.]

Foreign Exchange
Students

The person is a foreign exchange student placed with a host family that resides in the district by a nationally recognized foreign exchange program, unless the district has applied for and been granted a waiver by the commissioner of education because:

1. This requirement would impose a financial or staffing hardship on the district;
2. The admission would diminish the district's ability to provide high-quality education services for the district's domestic students; or
3. The admission would require domestic students to compete with foreign exchange students for educational resources.

Education Code 25.001(b)(6), (e)

ADMISSIONS

FD
(LEGAL)

Students in Residential Facility	The person resides at a residential facility, as defined in Education Code 5.001, located in the district. For purposes of enrollment, a person who resides in a residential facility is considered a resident of the district in which the facility is located. <i>Education Code 25.001(b)(7), 29.012(c)</i>
Students Over 18	The person resides in the district and is 18 or older or the person's disabilities of minority have been removed. <i>Education Code 25.001(b)(8)</i>
Resident Grandparent	The person does not reside in the district but the grandparent of the person: 1. Resides in the district; and 2. Provides a substantial amount of after-school care for the person as determined by the board. <i>Education Code 25.001(b)(9)</i>
Residence Homestead	The person and either parent of the person reside in a residence homestead, as defined by Tax Code 11.13(j), that is located on a parcel of property any part of which is located in the district. <i>Education Code 25.001(b)(10)</i>
Proof of Eligibility	A district may require evidence that a person is eligible to attend the public schools of the district at the time it considers an application for admission of the person. A board or its designee shall establish minimum proof of residency acceptable to a district. A board or its designee may make reasonable inquiries to verify a person's eligibility for admission. When admission is sought under the provision at Students Living Separate and Apart above, a board shall determine whether an applicant qualifies as a resident of a district and may adopt reasonable guidelines for making that determination as necessary to protect the best interest of students. <i>Education Code 25.001(c), (d)</i>
"Residence" Defined	"Residence" requires living in the district and having the present intention to remain there. <i>Martinez v. Bynum</i>, 461 U.S. 321 (1983) A district may withdraw any student who ceases to be a resident. <i>Daniels v. Morris</i>, 746 F.2d 271 (5th Cir. 1984)
Active-Duty Parent	A person whose parent or guardian is an active-duty member of the armed forces of the United States, including the state military forces or a reserve component of the armed forces, may establish residency for purposes of eligibility of admission by providing to the district a copy of a military order requiring the parent's or guardian's transfer to a military installation in or adjacent to the district's attendance zone. <i>Education Code 25.001(c-1)</i>

A person who establishes residency under Education Code 25.001(c-1) shall provide to the district proof of residence in the district's attendance zone not later than the tenth day after the arrival date specified in the military order. For purposes of this provision, "residence" includes residence in a military temporary lodging facility. *Education Code 25.001(c-2)*

Immigration Status

Denying enrollment based upon immigration status to children who are not legally admitted into the United States violates the Equal Protection Clause of the Fourteenth Amendment to the U.S. Constitution. *Plyler v. Doe, 457 U.S. 202 (1982)*

**High School
Equivalency
Certificate**

A student who has received a high school equivalency certificate is entitled to enroll in a public school in the same manner as any other student who has not received a high school diploma. *Education Code 29.087(h)*

**Substitute for Parent
or Guardian**

A board by policy may allow a person showing evidence of legal responsibility for a child other than an order of a court to substitute for a guardian or other person having lawful control of the child under court order. *Education Code 25.001(j)*

**Authorization
Agreement**

"Adult caregiver" means an adult person whom a parent has authorized to provide temporary care for a child under Family Code Chapter 34. *Family Code 34.0015(1)*

A parent, as defined in Family Code 101.024, or both parents of a child may enter into an authorization agreement with an adult caregiver to authorize the adult caregiver to perform acts described in Family Code 34.002 in regard to the child, such as:

1. Authorizing medical, dental, psychological, or surgical treatment and immunization of the child, including executing any consents or authorizations for the release of information as required by law relating to the treatment or immunization;
2. Enrolling the child in the district; and
3. Authorizing the child to participate in age-appropriate extracurricular, civic, social, or recreational activities, including athletic activities.

Family Code 34.002

A parent may enter into an authorization agreement with an adult caregiver with whom a child is placed under a parental child safety placement agreement approved by the Department of Family and Protective Services (DFPS) to allow the person to perform the acts described above with regard to the child during an investigation of

abuse or neglect or while the department is providing services to the parent. *Family Code 34.0021*

The authorization agreement must conform to the requirements of Family Code Chapter 34.

A child who is the subject of an authorization agreement is not considered to be placed in foster care and the parties to the agreement are not subject to any law or rule governing foster care providers. *Family Code 34.0022(b)*

An authorization agreement does not affect the rights of the child's parent or legal guardian regarding the care, custody, and control of the child, and does not mean that the adult caregiver has legal custody of the child. *Family Code 34.007(b)*

Only one authorization agreement may be in effect for a child at any time. Execution of a subsequent authorization agreement does not by itself supersede, invalidate, or terminate a prior authorization agreement. An authorization agreement is void if it is executed while a prior authorization agreement remains in effect. *Family Code 34.002(d), .008(f)*

An authorization agreement is for a term of six months and renews automatically for six-month terms unless an earlier expiration date is stated in the agreement, the agreement is terminated under Family Code 34.008, or a court authorizes continuation. *Family Code 34.0075*

Immunity

A person who is not a party to the authorization agreement who relies in good faith on the authorization agreement, without actual knowledge that the authorization agreement is void, revoked, or invalid, is not subject to civil or criminal liability to any person, and is not subject to professional disciplinary action, for that reliance if the agreement is completed as required by Family Code Chapter 34. *Family Code 34.007(a)*

Note: The [Authorization Agreement for Nonparent Relative \(PDF\)](#)¹ is available on the DFPS website.

Temporary Authorization for Care

A person eligible to consent to treatment of a child under Family Code 32.001 or a person eligible to enter an authorization agreement [see Authorization Agreement, above] may seek a court order for temporary authorization for care of a child by filing a petition in the district court in the county in which the person resides if:

1. The child has resided with the person for at least the 30 days preceding the date the petition was filed; and

2. The person does not have an authorization agreement or other signed, written documentation from a parent, conservator, or guardian that enables the person to provide necessary care for the child.

Family Code 35.001--.002

The order may authorize the petitioner to, among other things:

1. Consent to medical, dental, psychological, and surgical treatment and immunization of the child;
2. Enroll the child in the district; and
3. Authorize the child to participate in age-appropriate extracurricular, civic, social, or recreational activities, including athletic activities.

A temporary authorization order does not affect the rights of the child's parent, conservator, or guardian regarding the care, custody, and control of the child, and does not establish legal custody of the child. *Family Code 35.007(b)*

Immunity

A person who relies in good faith on a temporary authorization order is not subject to civil or criminal liability to any person, or to professional disciplinary action. *Family Code 35.007(a)*

Students in Foster Care

A child placed in foster care by an agency of the state or a political subdivision shall be permitted to attend schools in the district in which the foster parents reside free of any charge to the foster parents or to the agency. A durational residence requirement may not be used to prohibit that child from fully participating in any activity sponsored by a district. *Education Code 25.001(f)*

A student who was enrolled in a primary or secondary public school before the student entered the conservatorship of DFPS and who is placed at a residence outside the attendance area for a school or outside a district is entitled to continue to attend the school in which the student was enrolled immediately before entering conservatorship until the student successfully completes the highest grade level offered by the school at the time of placement without payment of tuition. The student is entitled to continue to attend the school regardless of whether the student remains in the conservatorship of DFPS for the duration of the student's enrollment in the school. *Education Code 25.001(g)*

If a student who is in the conservatorship of DFPS is enrolled in a primary or secondary public school, other than the school in which the student was enrolled at the time the student was placed in the conservatorship of DFPS, the student is entitled to continue to at-

tend that school without payment of tuition until the student successfully completes the highest grade level offered by the school at the time of enrollment in the school, even if the child's placement is changed to a residence outside the attendance area for that school or outside the district. The student is entitled to continue to attend the school regardless of whether the student remains in the conservatorship of DFPS for the duration of the student's enrollment in the school. *Education Code 25.001(g-1)*

A written case plan for any child in foster care under the responsibility of the state must include a plan for ensuring the educational stability of the child while in foster care, including:

1. Assurances that each placement of the child in foster care takes into account the appropriateness of the current educational setting and the proximity to the school in which the child is enrolled at the time of placement; and
2. An assurance that the appropriate state agency has coordinated with a district to ensure that the child remains in the school in which the child is enrolled at the time of each placement; or if remaining in that school is not in the best interests of the child, assurances by the state agency and the district to provide immediate and appropriate enrollment in a new school, with all of the educational records of the child provided to the school.

42 U.S.C. 675(1)(G), 675a [See CNA]

[For information regarding the transfer of records and other transition requirements for a student who is in substitute care, see FFC.]

Transfers from Other States

A district shall charge tuition for a student who resides in a residential facility and whose maintenance or expenses are paid in whole or in part by another state or the United States. Any such tuition charge must be submitted to the commissioner for approval. The attendance of students admitted under this provision shall not be counted for purposes of allocating state funds to a district. *Education Code 25.003*

Students Holding F-1 Student Visas

If a student is required, as a condition of obtaining or holding the appropriate U.S. student visa, to pay tuition to the district that the student attends to cover the cost of the student's education provided by the district, the district shall accept tuition for the student in an amount equal to the full unsubsidized per capita cost of providing the student's education for the period of the student's attendance at school in the district.

The commissioner shall develop guidelines for determining the amount of the full unsubsidized per capita cost of providing a stu-

dent's education. A district may not accept tuition in an amount greater than the amount computed under the commissioner's guidelines unless the commissioner approves a greater amount as a more accurate reflection of the cost of education to be provided by the district.

The attendance of a student for whom a district accepts tuition is not counted for purposes of allocating state funds to the district.

Education Code 25.0031

Note: Enrolling students with F-1 visas is optional. If the district is interested in enrolling students with F-1 visas, it must comply with the federal [Student and Exchange Visitor Program](#)² (SEVP) under the Department of Homeland Security.

**Texas Juvenile
Justice Department**

A school-age child of an employee of the Texas Juvenile Justice Department (TJJD) residing in an adjacent district may attend school in a district free of charge to his or her parents or guardian. Any tuition required by the admitting district shall be paid by the district from which the student transfers out of any funds appropriated to the TJJD facility. *Education Code 25.042*

Enrollment

A child must be enrolled by the child's parent, guardian, or other person with legal control under a court order. A district shall record the name, address, and date of birth of the person enrolling the child. *Education Code 25.002(f)*

Legal Surname

A student must be identified by the student's legal surname as it appears on the student's birth certificate or other document suitable as proof of the student's identity, or in a court order changing the student's name. *Education Code 25.0021*

Required
Documentation

If a parent or other person with legal control of a child enrolls the child in a public school, the parent or other person, or the district in which the child most recently attended school, shall furnish to the district all of the following:

1. The child's birth certificate, or another document suitable as proof of the child's identity.
2. A copy of the child's records from the school the child most recently attended if he or she was previously enrolled in a school in Texas or in another state.
3. A record showing that the child has the immunizations required by Education Code 38.001, proof that the child is not

required to be immunized, or proof that the child is entitled to provisional admission. [See FFAB]

Education Code 25.002(a)

A district must furnish information under items 1 and 2 not later than the tenth working day after the date the district receives a request for the information.

A parent or other person with legal control of a child under a court order must furnish information under items 1 and 2 not later than the 30th day after the date a child is enrolled in a public school.

If a parent or other person with legal control of a child under a court order requests that a district transfer a child's student records, the district to which the request is made shall notify the parent or other person as soon as practicable that the parent or other person may request and receive an unofficial copy of the records for delivery in person to a school in another district.

Education Code 25.002(a-1)

*Residential
Facility*

Except for a juvenile pre-adjudication secure detention facility or a juvenile post-adjudication secure correctional facility, a residential facility shall provide to a district that provides educational services to a student placed in the facility any information retained by the facility relating to:

1. The student's school records, including records regarding special education eligibility or services, behavioral intervention plans, school-related disciplinary actions, and other documents related to the student's educational needs;
2. Any other behavioral history information regarding the student that is not confidential under another law; and
3. The student's record of convictions or the student's probation, community supervision or parole status, as provided to the facility, if necessary to provide education services to the student.

Education Code 29.012(f), (g)

*Summer School
Enrollment*

A district shall permit a person who is eligible under Education Code 25.001 [see General Eligibility, above] to attend school in the district but who is not enrolled in school in the district to enroll in a district summer school course on the same basis as a district student, including satisfaction of any course eligibility requirement and payment of any fee authorized under Education Code 11.158 [see FP] that is charged in connection with the course.

This requirement does not apply to enrollment in a Summer Intensive Mathematics Instruction Program under Education Code 29.088, a Summer Intensive Science Instruction Program under Education Code 29.090, or in a similar intensive program.

Education Code 25.008

Enrollment in
Prekindergarten
and Kindergarten

A parent or guardian may elect for a student to enroll in prekindergarten, if the student would have been eligible to enroll in prekindergarten during the previous school year under Education Code 29.153(b) [see EHBG] and the student has not yet enrolled in kindergarten, or enroll in kindergarten, if the student would have been eligible to enroll in kindergarten in the previous school year and has not yet enrolled in first grade. *Education Code 28.02124* [See EIE]

Food Allergy
Information

On enrollment, a district shall request, by providing a form or otherwise, that a parent or other person with legal control of the child under a court order disclose whether the child has a food allergy or a severe food allergy that, in the judgment of the parent or other person with legal control, should be disclosed to the district to enable the district to take any necessary precautions regarding the child's safety [see FB and FFAF]; and specify the food to which the child is allergic and the nature of the allergic reaction.

The district shall maintain the confidentiality of the provided information, and may disclose the information to teachers, school counselors, school nurses, and other appropriate school personnel only to the extent consistent with district policy under Education Code 38.009 and permissible under the Family Educational Rights and Privacy Act of 1974, 20 U.S.C. Section 1232g. [See FL]

"Severe food allergy" means a dangerous or life-threatening reaction of the human body to a food-borne allergen introduced by inhalation, ingestion, or skin contact that requires immediate medical attention.

Education Code 25.0022(a)–(c)

Child in DFPS
Possession

A district shall enroll a child without the required documentation if DFPS has taken possession of the child. DFPS shall ensure that the required documentation is furnished to a district not later than the 30th day after the date the child is enrolled. *Education Code 25.002(g)*

Inconsistent
Documentation

If a child is enrolled under a name other than the name that appears in the identifying documents or records, a district shall notify the missing children and missing persons information clearinghouse of the child's name as shown on the identifying records and the name under which the child is enrolled.

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Missing
Documentation

If the required documents and other records are not furnished to a district within 30 days after enrollment, the district shall notify the police department of the city or the sheriff's department of the county in which the district is located and request a determination of whether the child has been reported as missing.

Education Code 25.002(b)–(c)

Parent Contact
Information

The parent of a student enrolled in a district shall provide in writing to the district:

1. On enrollment of the student in the district and not later than two weeks after the beginning of each school year, the parent's address, phone number, and email address; and
2. If the parent's contact information changes during the school year, not later than two weeks after the date the information changes, the parent's updated information.

Education Code 26.0125

Students Under 11

On enrollment of a child under 11 years of age in a school for the first time at the school, the school shall:

1. Request from the person enrolling the child the name of each previous school attended by the child;
2. Request from each school identified in item 1 the school records for the child and, if the person enrolling the child provides copies of previous school records, request verification from the school of the child's name, address, date, and grades and dates attended; and
3. Notify the person enrolling the student that not later than the 30th day after enrollment, or the 90th day if the child was not born in the United States, the person must provide:
 - a. A certified copy of the child's birth certificate; or
 - b. Other reliable proof of the child's identity and age and a signed statement explaining the person's inability to produce a copy of the child's birth certificate.

If a person enrolls a child under 11 years of age in school and does not provide the valid prior school information or documentation required, the school shall notify the appropriate law enforcement agency before the 31st day after the person fails to comply.

Code of Criminal Procedure 63.019

False Information

When accepting a child for enrollment, a district shall inform the parent or other person enrolling the child that presenting a false

document or false records in connection with enrollment is a criminal offense under Penal Code 37.10 (Tampering with Governmental Records) and that enrolling the child under false documents makes the person liable for tuition or other costs as provided below. *Education Code 25.002(d)*

In addition to the penalty under Penal Code 37.10, a person who knowingly falsifies information on a form required for a student's enrollment in a district is liable to the district if the student is not eligible for enrollment but is enrolled on the basis of false information. For the period during which the ineligible student is enrolled, the person is liable for the maximum tuition fee a district may charge [see FDA] or the amount a district has budgeted per student as maintenance and operating expense, whichever is greater. *Education Code 25.001(h)*

A district may include on its enrollment form notice of the legal penalties and liability for falsifying information on the form. *Education Code 25.001(i)*

**Placement of
Transfers**

Credits and
Records

A district shall accept all credits earned toward state graduation requirements by students in accredited Texas school districts, including credits earned in accredited summer school programs. Credits earned in local credit courses may be transferred at a district's discretion. Transfer students shall not be prohibited from attending school pending receipt of transcripts or academic records from the district the student previously attended. *19 TAC 74.26(a)(1)*

A district shall grant a student credit toward the academic course requirements for high school graduation for courses the student successfully completes in TJJD educational programs. *Education Code 30.104(a)*

Each district shall consider course credit earned by a student while in a juvenile justice alternative education program as credit earned in a district school. *Education Code 37.011(d)*

Nonpublic Schools

Records and transcripts of students from Texas nonpublic schools or from out of state or out of the country (including foreign exchange students) shall be evaluated, and students shall be placed promptly in appropriate classes. A district may use a wide variety of methods to verify the content of courses for which a transfer student has earned credit. *19 TAC 74.26(a)(2)*

[For information regarding educational placement of students who are homeless or in substitute care, see FFC.]

**Foundation School
Program**

A person is entitled to the benefits of the available school fund for a school year if:

1. On September 1 of the year, the person:
 - a. Is at least five years of age and under 21 years of age, and has not graduated from high school;
 - b. Is at least 21 years of age and under 26 years of age and is admitted by a school district to complete the requirements for a high school diploma; or
 - c. Is at least 18 years of age and under 50 years of age and is enrolled in an adult education program provided under the adult high school charter school program under Education Code Chapter 12, Subchapter G.
2. The person is enrolled in prekindergarten under Education Code 29.153 [see EHBG].
3. The person is younger than five years of age and performs satisfactorily on the state assessment instrument administered to third graders and a district has adopted a policy to admit students younger than five years of age.
4. The person is enrolled in the first grade and is at least six years of age at the beginning of the current school year or has been enrolled in the first grade, or has completed kindergarten, in the public schools of another state before transferring to a Texas public school.

Education Code 25.001(a), 48.003

Screening

The principal of each district school shall ensure that each student admitted to that school has complied with requirements for screening of special senses and communication disorders, spinal screening, and a risk assessment for Type 2 diabetes, or has submitted an affidavit of exemption. *Health and Safety Code 36.005, 37.002, 95.003(c)* [See FFAA]

**Pest Control
Information**

Chief administrators or the integrated pest management (IPM) coordinators of schools must notify the parents or guardians of children attending the facility in writing that pesticides are periodically applied indoors and outdoors, and that information on the times and types of applications and prior notification is available upon request. Such notification must be made at the time of the students' registration. Telephonic, written, or electronic notification of planned applications will meet the notification requirements. *4 TAC 7.148(c); Occupations Code 1951.455(b)* [See CLB]

¹ Authorization Agreement for Nonparent Relative (PDF):
<https://www.dfps.state.tx.us/Application/Forms/showFile.aspx?NAME=2638.pdf>

² Student and Exchange Visitor Program: <https://www.ice.gov/sevis>

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Persons Age 21 and Over	The District shall not admit into its public schools any person age 21 or over unless otherwise required by law.
Registration Forms	The student's parent, legal guardian, or other person having lawful control shall annually complete registration forms. A student who has reached age 18 shall be permitted to complete these forms.
Proof of Residency	In accordance with administrative regulations, the parent, guardian, or other person having lawful control of the student under order of a court shall present proof of residency. The District may investigate stated residency as necessary.
Minor Living Apart	A minor student residing in the District but whose parent, guardian, or other person having lawful control under a court order does not reside in the District shall present a power of attorney or an authorization agreement as provided in Chapter 34 of the Family Code assigning responsibility for the student in all school-related matters to an adult resident of the District.
Person Standing in Parental Relation	
Misconduct	A minor student living apart who has engaged in misconduct that results in any of the consequences found in Education Code 25.001(d) shall not be permitted to attend a District school.
Exceptions	Based on an individual student's circumstance, the Superintendent shall have authority to grant exceptions to the requirement for a power of attorney or authorization agreement and to the exclusion for misconduct.
Extracurricular Activities	The Superintendent shall determine whether a minor student living apart is present in the District for the primary purpose of participating in extracurricular activities.
Nonresident Student in Grandparent's After-School Care	The parent and grandparent of a nonresident student requesting admission under Education Code 25.001(b)(9) shall provide to the Superintendent the required information on the grandparent's residency and complete a form provided by the District describing the extent of after-school care to be provided by the grandparent. The Superintendent shall have authority to approve or deny such admissions requests in accordance with criteria approved by the Board.
"Accredited" Defined	For the purposes of this policy, "accredited" shall be defined as accreditation by TEA, an equivalent agency from another state, or an accrediting association recognized by the commissioner of education.
Grade-Level Placement	The parent, guardian, or other person having lawful control of a student enrolling in a District school from an accredited public, private, or parochial school shall provide evidence of the prior schooling outside the District. The student shall be placed initially at the
Accredited Schools	

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grade level reached elsewhere, pending observation by the classroom teacher, guidance personnel, and the principal. On the basis of these observations and results of tests that may be administered by appropriate District personnel, the principal shall determine the final grade placement.

**Nonaccredited
Schools**

A student enrolling in a District school from a nonaccredited public, private, or parochial school, including a homeschool, shall be placed initially at the discretion of the principal, pending observation by classroom teachers, guidance personnel, and the principal. Criteria for placement may include:

1. Scores on achievement tests, which may be administered by appropriate District personnel.
2. Recommendation of the sending school.
3. Prior academic record.
4. Chronological age and social and emotional development of the student.
5. Other criteria deemed appropriate by the principal.

Transfer of Credit

**Accredited Texas
Public Schools**

Credit toward state graduation requirements earned in an accredited public school district in Texas shall be transferable and recognized by the District.

**Other Accredited or
Nonaccredited
Schools**

Before recognizing credit in a course earned in an accredited non-public school, an accredited school outside of Texas, or a nonaccredited school, appropriate personnel shall evaluate a student's records and transcript. The District may require the student to demonstrate mastery of the content or use alternative methods to verify course content for the award of credit.

**Transition
Assistance**

In accordance with law, when a student who is identified as homeless or in substitute care enrolls in the District, the District shall assess the student's available records and other relevant information to ensure credit, including proportionate credit, is awarded appropriately for all subjects and courses taken prior to enrollment.

[See EI]

Withdrawal

A parent or guardian wishing to withdraw a minor student shall present a signed statement that includes the reason for the withdrawal. A student who is 18 or older may submit a withdrawal statement without a parent's or guardian's signature.

[For District withdrawal of students no longer in attendance, see FEA(LOCAL).]

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Agreement Between Districts

The boards of two or more adjoining school districts or the boards of county school trustees of two or more adjoining counties may, by agreement and in accordance with Education Code 25.032–.034, arrange for the transfer and assignment of any student from the jurisdiction of one board to that of another. In the case of the transfer and assignment of a student under this provision, the participating governing boards shall also agree to the transfer of school funds or other payments proportionate to the transfer of attendance. *Education Code 25.035*

Initiated by Student or Parent

Any student, other than a high school graduate, who is under 21 years of age and eligible for enrollment on September 1, may transfer to another Texas district, provided that both the receiving district and the applicant's parent, guardian, or person having lawful control agree in writing to the transfer. *Education Code 25.036* [See also FD]

Transfer to a District Offering In-Person Instruction

If a district provides notice to the parent or person standing in parental relation to a student enrolled in the district of the district's intent to offer only virtual instruction for more than one grading period during a school year, the student may transfer for that school year to another district that offers in-person instruction during that school year and accepts the student's transfer.

"Virtual instruction" means instructional activities delivered to students primarily over the internet.

A student who transfers to another school district under this section may not be charged tuition. The student is included in the average daily attendance of the district in which the student attends school.

Education Code 25.045

Basis for Transfer

A board or its designee must make transfer decisions on an individual basis and may not consider as a factor in arriving at any decision regarding assignments any matter relating to the national origin of the student or the student's ancestral language. *Education Code 25.032* [See FDAA]

Transportation

A board may establish and operate an economical public school transportation system outside the district if students enrolled in the district reside outside the district and the district meets the requirements of Education Code 34.007(a)(3) [see CNA]. *Education Code 34.007(a)*

Funding for Transfers

Upon the filing and certification of any transfer, the state per capita apportionment shall transfer with the student. For purposes of computing state allotments to districts eligible under the Foundation School Program, the student's attendance prior to the date of transfer shall be counted by the sending district and the student's

attendance after transfer shall be counted by the receiving district.
Education Code 25.037

Credits and Records

Credits earned in local credit courses may be transferred at the enrolling district's discretion. Transfer students shall not be prohibited from attending school pending receipt of transcripts or academic records from the district the student previously attended. *19 TAC 74.26(a)(1)*

Nonpublic Schools

Records and transcripts of students from Texas nonpublic schools or from out of state or out of the country (including foreign exchange students) shall be evaluated, and students shall be placed promptly in appropriate classes. A district may use a wide variety of methods to verify the content of courses for which a transfer student has earned credit. *19 TAC 74.26(a)(2)*

**Tuition Fee for
Transfer Students**

A receiving district may charge a tuition fee to the extent that the district's actual expenditure per student in average daily attendance exceeds the sum of state available school fund apportionment benefits transferred under Education Code 25.037. However, unless a tuition fee is prescribed and set out in a transfer agreement prior to its execution by the parties, no increase in tuition charge shall be made for the year of that transfer that exceeds the tuition charge, if any, of the preceding school year. *Education Code 25.038*

**Transfers to
Adjoining States**

Note: The following provision applies to a district located on the border of an adjoining state.

Any student who would be entitled to attend the public school of any district situated on the border of Louisiana, Arkansas, Oklahoma, or New Mexico and who may find it more convenient to attend the public school in a district in one of those contiguous states, may have the state and county per capita apportionment of the available school funds paid to the school district of the contiguous state and may have additional tuition, if necessary, paid by the district of residence on such terms as may be agreed upon by the trustees of the receiving district and the trustees of the residence district. *Education Code 25.040*

**Contracts for
Education Outside
Districts**

Note: The following section applies only to districts that do not offer all grades, kindergarten–grade 12.

A district that does not offer each grade, kindergarten–grade 12, may provide by contract for students residing in the district who are at grade levels not offered by the district to be educated at those grade levels in one or more other districts. In each contract, the

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districts also shall agree to the transfer of school funds or other payments proportionate to the transfer of attendance.

Tuition

The district in which the students reside shall pay tuition to any district with which it has a contract under this section for each of its students attending school in that district at a grade level for which the district has contracted. The amount of the tuition paid may not exceed the greater of the amount provided for by Education Code 25.038 [see above], or an amount specified by commissioner rule [see below].

A district is not required to pay tuition to any district with which it has not contracted for the attendance by any of its students at a grade level for which it has contracted under this provision with another district.

A contract under this provision may not be for a period exceeding five years.

Education Code 25.039

Definitions

“Home district” means a district of residence of a transferring student.

“Receiving district” means a district to which a student is transferring for the purpose of obtaining an education.

“Tuition” means an amount charged to the home district by the receiving district to educate the transfer student.

*Tuition Allotment
of the Home
District*

For the purposes of calculating the tuition allotment of the home district as authorized by Education Code 48.154, the amount of tuition that may be attributed to a home district for a transfer student in payment for that student’s education may not exceed an amount per enrollee calculated for each receiving district. The calculated limit applies only to tuition paid to a receiving district for the education of a student at a grade level not offered in the home district. Tuition may be set at a rate higher than the calculated limit if both districts enter a written agreement, but the calculated tuition limit will be used in the calculation of the tuition allotment for the home district. The calculation will use the most currently available data in an ongoing school year to determine the limit that applies to the subsequent school year. For purposes of this provision, the number of students enrolled in a district will be appropriately adjusted to account for students ineligible for the Foundation School Program funding and those eligible for half-day attendance.

*Calculated
Tuition Limit*

The calculated tuition limit is the sum of the excess maintenance and operations (M&O) revenue per enrollee and the excess debt

revenue per enrollee, as calculated in 19 Administrative Code 61.1012(b)(2)–(3).

*Notification and
Appeal Process*

In the spring of each school year, the commissioner will provide each district with its calculated tuition limit and a worksheet with a description of the derivation process. A district may appeal to the commissioner if it can provide evidence that the use of projected student counts from the LPE in making the calculation is so inaccurate as to result in an inappropriately low authorized tuition charge and undue financial hardship. A district that used significant nontax sources to make any of its debt service payments during the base year for the computation may appeal to the commissioner to use projections of its tax collections for the year for which the tuition limit will apply. The commissioner's decision regarding an appeal is final.

19 TAC 61.1012

Note: For more information regarding support services for students experiencing homelessness, including provisions regarding district liaisons and transition services, see FFC.

Children Who Are Homeless

As a condition of receiving funds under the McKinney-Vento Homeless Assistance Act (McKinney-Vento Act), a district serving children who are homeless shall, according to the child's best interest:

1. Continue the child's education in the school of origin for the duration of homelessness:
 - a. If the child's family becomes homeless between academic years or during an academic year; and
 - b. For the remainder of the academic year, if the child becomes permanently housed during an academic year; or
2. Enroll the child in any school that nonhomeless students who live in the attendance area in which the child is actually living are eligible to attend.

42 U.S.C. 11432(g)(3)(A) [For definition of "children who are homeless," see FD]

Definitions

Unaccompanied Youth

"Unaccompanied youth" includes a child who is homeless or youth not in the physical custody of a parent or guardian. *42 U.S.C. 11434A*

Enrollment

"Enroll" and "enrollment" include attending classes and participating fully in school activities.

School of Origin

"School of origin" means the school that the child attended when permanently housed or the school in which the child was last enrolled, including a preschool.

When the child completes the final grade level served by the school of origin, the term "school of origin" shall include the designated receiving school at the next grade level for all feeder schools.

42 U.S.C. 11432(g)(3)(I)

School Stability

In determining the best interest of a child who is homeless, a district shall:

1. Presume that keeping the child in the school of origin is in the child's best interest, except when doing so is contrary to the

request of the child's parent or guardian, or (in the case of an unaccompanied youth) the youth;

2. Consider student-centered factors related to the child's best interest, including factors related to the impact of mobility on achievement, education, health, and safety of children who are homeless, giving priority to the request of the child's parent or guardian or the unaccompanied youth;
3. If, after conducting the best interest determination based on consideration of the presumption in item 1 above and the student-centered factors in item 2 above, the district determines that it is not in the child's best interest to attend the school of origin or the school requested by the parent or guardian or the unaccompanied youth, provide the parent, guardian, or unaccompanied youth with a written explanation of the reasons for its determination, in a manner and form understandable to such parent, guardian, or unaccompanied youth, including information regarding the right to appeal as set forth at Enrollment Disputes, below; and
4. In the case of an unaccompanied youth, ensure that the homeless liaison [see FFC] assists in placement and enrollment decisions under these provisions, gives priority to the views of such unaccompanied youth, and provides the notice to such youth of the right to appeal as set forth at Enrollment Disputes, below.

42 U.S.C. 11432(g)(3)(B)

Contact Information

A district may require the parent or guardian of a child who is homeless to submit contact information. *42 U.S.C. 11432(g)(3)(H)*

**Immediate
Enrollment**

The school selected in accordance with these provisions shall immediately enroll a child who is homeless, even if the child:

1. Is unable to produce records normally required for enrollment, such as previous academic record, records of immunization and other required health records, proof of residency, or other document; or
2. Has missed application or enrollment deadlines during any period of homelessness.

42 U.S.C. 11432(g)(3)(C)

Enrollment Disputes

If a dispute arises over eligibility, or school selection or enrollment in a school:

1. The child shall be immediately enrolled in the school in which enrollment is sought, pending final resolution of the dispute, including all available appeals;
2. The parent or guardian of the child or an unaccompanied youth shall be provided with a written explanation of any decisions related to school selection or enrollment made by the district, including the rights of the parent, guardian, or unaccompanied youth to appeal such decisions.
3. The parent, guardian, or unaccompanied youth shall be referred to the homeless liaison [see FFC], who shall carry out the dispute resolution process as expeditiously as possible after receiving notice of the dispute; and
4. In the case of an unaccompanied youth, the liaison shall ensure that the youth is immediately enrolled in the school in which the youth seeks enrollment pending resolution of such dispute.

42 U.S.C. 11432(g)(3)(E) [See FNG]

School Placement

As a condition of receiving funds under the McKinney-Vento Act, TEA shall submit to the U.S. Secretary of Education a plan that includes assurances that a district will adopt policies and practices to ensure that children who are homeless are not stigmatized or segregated on the basis of their status as homeless. *42 U.S.C. 11432(g)(1)(J)(i)*

The choice regarding placement shall be made regardless of whether the child lives with the parents who are homeless or has been temporarily placed elsewhere. *42 U.S.C. 11432(g)(3)(F)*

Records

Academic

The enrolling school shall immediately contact the school last attended by the child to obtain relevant academic and other records. *42 U.S.C. 11432(g)(3)(C)(ii)*

Health

If the child needs to obtain immunizations or other required health records, the enrolling school shall immediately refer the child's parent or guardian or an unaccompanied youth to the district homeless liaison [see FFC] who shall assist in obtaining necessary immunizations or screenings, or immunization or other required health records. [See also FFAB] *42 U.S.C. 11432(g)(3)(C)(iii)*

Maintenance

Any record ordinarily kept by a school, including immunization or other required health records, academic records, birth certificates, guardianship records, and evaluation for special services or programs, regarding each child who is homeless shall be maintained so that the records involved are available, in a timely fashion, when a child enters a new school or district, and in a manner consistent

	with the Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. 1232g) [see FL]. 42 U.S.C. 11432(g)(3)(D)
Privacy	Information about the living situation of a child who is homeless shall be treated as a student education record and shall not be deemed to be directory information under FERPA. [See FL] 42 U.S.C. 11432(g)(3)(G)
Comparable Services	The district shall provide a child who is homeless with services that are comparable to services offered to other students in the school in which the child is enrolled, including: 1. Transportation services; 2. Educational services for which the child meets the eligibility criteria; 3. Programs in career and technical education; 4. Programs for gifted and talented students; and 5. School nutrition programs. 42 U.S.C. 11432(g)(4)
Coordination	A district serving children who are homeless shall coordinate: 1. The provision of services with local social services agencies and other agencies or entities providing services to children who are homeless and their families; and 2. Transportation, transfer of school records, and other interdistrict activities with other local educational agencies.
Housing Assistance	If applicable, a district shall coordinate with state and local housing agencies responsible for developing the comprehensive housing affordability strategy described in the Cranston-Gonzalez National Affordable Housing Act (42 U.S.C. 12705), to minimize educational disruption for children who become homeless.
Purpose	The coordination shall be designed to: 1. Ensure that children who are homeless are promptly identified and have access to, and are in reasonable proximity to, available education and related support services; and 2. Raise the awareness of school personnel and service providers of the effects of short-term stays in a shelter and other challenges associated with homelessness.

ADMISSIONS
HOMELESS STUDENTS

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(LEGAL)

Children who are
Homeless with
Disabilities

For children who are to be assisted both under the McKinney-Vento Act and under the Individuals with Disabilities Education Act (20 U.S.C. 1400 et seq.) or section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794), a district shall coordinate provision of services under the McKinney-Vento Act with the provision of programs for children with disabilities served by that district and other involved local educational agencies. [See EHBA series]

42 U.S.C. 11432(g)(5)

Barriers to
Enrollment

A district shall review and revise any policies that may act as barriers to the identification or enrollment of children who are homeless. A district shall give consideration to issues concerning transportation, immunization, residency, birth certificates, school records and other documentation, and guardianship. A district shall give special attention to ensuring the identification, enrollment, and attendance of children who are homeless who are not currently attending school. *42 U.S.C. 11432(g)(7)*

**Website Information
on Local Programs**

Each campus within a district with 3,000 or more students and located in a county with a population of at least 50,000 that maintains an internet website shall post on the campus website information regarding local programs and services, including charitable programs and services, available to assist students who are homeless.

A campus shall make a good faith effort to compile information and shall post the information compiled in a format and style that is easily understandable by students or parents, as appropriate based on the grade levels the campus offers.

A representative of a local program or service available to assist students who are homeless may request to have information concerning the program or service posted on a campus website. A campus may determine the information that is posted on its website and is not required to post information as requested by the representative.

The district is not liable for any harm to a student that results in connection with a local program or service referred to on the website of a campus.

Education Code 33.906

Other Related Policies:

- AID—Federal Accountability Standards
 - CNA—Student Transportation
-

-
- EHBD—Federal Title I Programs
 - FB—Equal Educational Opportunities
 - FD—Admissions
 - FFAB—Immunizations
 - FFC—Student Support Services
 - FL—Student Records
 - FP—Student Fees, Fines, and Charges
-

Note: The Board has adopted an [innovation plan](#)¹ that affects application of provisions in this legally referenced policy.

**Compulsory
Attendance**

Students who are at least six years of age, or who have been previously enrolled in first grade, and who have not yet reached their 19th birthday shall attend school for the entire period the program is offered, unless exempted as indicated below. On enrollment in prekindergarten or kindergarten, a student shall attend school. *Education Code 25.085(a)–(c)*

**Voluntary Enrollment
of Students 19 and
Over**

A person who voluntarily enrolls in school or voluntarily attends school after the person's 19th birthday shall attend school each school day for the entire period the program of instruction is offered. A board may adopt a policy requiring the student who is under 21 years of age to attend school until the end of the school year.

After the third unexcused absence of a person who voluntarily enrolls, a district shall issue a warning letter to the person that states the person's enrollment may be revoked for the remainder of the school year if the person has more than five unexcused absences in a semester.

A district may revoke for the remainder of the school year the enrollment of a person who has more than five unexcused absences in a semester, except a school district may not revoke the enrollment of a person under this provision on a day on which the person is physically present at school.

A person whose enrollment is revoked for exceeding this limit may be considered an unauthorized person on school grounds for the purposes of Education Code 37.107 regarding trespassing.

As an alternative to revoking a person's enrollment, a school district may impose a behavior improvement plan described by Education Code 25.0915(a-1)(1).

Education Code 25.085(e)–(h)

**Accelerated /
Compensatory
Programs**

Unless specifically exempted, a student must also attend:

1. An extended-year program for which the student is eligible that is provided by a district for students identified as likely not to be promoted to the next grade level or tutorial classes required by the district under Education Code 29.084 [see EHBC];

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2. An accelerated reading instruction program to which the student has been assigned under Education Code 28.006(g) [see EKC];
3. An accelerated instruction program to which the student is assigned under Education Code 28.0211 [see EIE];
4. A basic skills program to which the student is assigned under Education Code 29.086 [see EHBC]; or
5. A summer program provided:
 - a. To a student placed in in-school suspension or other alternative setting, other than a disciplinary alternative education program (DAEP), who has been offered the opportunity to complete before the beginning of the next school year each course in which the student was enrolled at the time of removal. *Education Code 37.021* [See FO]
 - b. To a student removed to a DAEP who has been offered an opportunity to complete coursework before the beginning of the next school year. *Education Code 37.008(l)* [See FOCA]

Education Code 25.085(d)

**Additional
Instructional Days**

Notwithstanding any other provision in Education Code 25.085, a student enrolled in a district is not required to attend school for any additional instructional days described by Education Code 48.0051 [See Incentive for Additional Instructional Days at FEB(LEGAL)].
Education Code 25.085(i)

Exemptions

A student is exempt from compulsory attendance requirements under the following statutory provisions.

Equivalency
Diploma

A student is exempt from compulsory attendance requirements if the student is at least 17 years of age and has been issued a high school equivalency certificate or diploma.

Private or Home
School

A student is exempt from compulsory attendance requirements if the student attends a private or parochial school that includes in its course a study of good citizenship.

A student in a home school shall be exempt from compulsory attendance if he or she is pursuing in good faith a curriculum consisting of books, workbooks, other written materials (including those that appear on an electronic screen of either a computer or video tape monitor), or any combination of these. The curriculum shall be designed to meet basic education goals of reading, spelling, gram-

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mar, mathematics, and a study of good citizenship. Tex. Educ. Agency v. Leeper, 893 S.W.2d 432 (Tex. 1994)

Special Education— Nondistrict Placement	A student is exempt from compulsory attendance requirements if the student is eligible to participate in a district's special education program under Education Code 29.003 and cannot be appropriately served by the resident district.
Medical Condition	A student is exempt from compulsory attendance requirements if the student has a temporary and remediable physical or mental condition that makes attendance infeasible and the student has a certificate from a qualified physician specifying the temporary condition, indicating the prescribed treatment, and covering the anticipated period of absence for the purpose of receiving and recuperating from remedial treatment.
Expulsion—No JJAEP	A student is exempt from compulsory attendance requirements if the student is expelled in accordance with legal requirements in a district that does not participate in a mandatory juvenile justice alternative education program. [See FOD]
17-Year-Old in GED Course	A student is exempt from compulsory attendance requirements if the student is at least 17 years old, is attending a course of instruction to prepare for the high school equivalency examinations, and: 1. Has the permission of the student's parent or guardian to attend the course; 2. Is required by court order to attend the course; 3. Has established a residence separate and apart from the student's parent, guardian, or other person having lawful control of the student; or 4. Is homeless.
High School Replacement Programs	A student is exempt from compulsory attendance requirements if the student is enrolled in the Texas Academy of Leadership in the Humanities, Texas Academy of Mathematics and Science, or Texas Academy of International Studies.
16-Year-Old in GED Program or Job Corps	A student is exempt from compulsory attendance requirements if the student is at least 16 years old and is attending a course of instruction to prepare for the high school equivalency examinations, if: 1. The student is recommended to take the course by a public agency that has supervision or custody of the student under a court order; or

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2. The student is enrolled in a Job Corps training program under the Workforce Investment Act of 1998, 29 U.S.C. 2801. [Note: The Workforce Investment Act of 1998 has been repealed.]

Other Exemption

A student is exempt from compulsory attendance requirements if the student is specifically exempted under another law.

Education Code 25.086

**Excused Absences
for Compulsory
Attendance
Determinations**

Note: Additional information regarding attendance accounting requirements is found in the Texas Education Agency's (TEA) [*Student Attendance and Accounting Handbook*](#).²

A district shall excuse a student from attending school for the following purposes, including travel for those purposes.

1. Observing religious holy days;
2. Attending a required court appearance;
3. Appearing at a governmental office to complete paperwork required in connection with the student's application for United States citizenship.
4. Taking part in a United States naturalization oath ceremony;
5. Serving as an election clerk [see Early Voting Clerks, below]; or
6. If a student is in the conservatorship of the Department of Family and Protective Services (DFPS), participating, as determined and documented by DFPS, in an activity:
 - a. Ordered by a court under Family Code Chapter 262 or 263, provided that it is not practicable to schedule the participation outside of school hours, or
 - b. Required under a service plan under Family Code Chapter 263, Subchapter B.

Education Code 25.087(b)(1)

Health-Care
Appointments

A district shall excuse a student from attending school for a temporary absence resulting from an appointment with a health-care professional for the student or the student's child if the student commences classes or returns to school on the same day of the appointment. "Temporary absence" includes the temporary absence of a student diagnosed with autism spectrum disorder on the day of the student's appointment with a health-care practitioner to receive a generally recognized service for persons with autism spectrum disorder, including applied behavioral analysis, speech

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therapy, and occupational therapy. *Education Code 25.087(b)(2)–(b-3)*

Serious or Life-
Threatening Illness

A district shall excuse an absence resulting from a serious or life-threatening illness or related treatment that makes the student's attendance infeasible, if the student or the student's parent or guardian provides a certification from a physician licensed to practice medicine in Texas specifying the student's illness and the anticipated period of the student's absence relating to the illness or related treatment. *Education Code 25.087(b)(3)*

Higher Education
Visits

A district may excuse a student from attending school to visit an institution of higher education accredited by a generally recognized accrediting organization during the student's junior and senior years of high school for the purpose of determining the student's interest in attending the institution of higher education, provided that:

1. The district may not excuse for this purpose more than two days during the student's junior year and two days during the student's senior year; and
2. The district adopts:
 - a. A policy to determine when an absence will be excused for this purpose; and
 - b. A procedure to verify the student's visit at the institution of higher education.

Education Code 25.087(b-2)

Early Voting Clerks

A district may adopt a policy excusing a student from attending school for service as a student early voting clerk in an election. A district may excuse a student for serving as an election clerk [see Election Clerks, above] or early voting clerk for a maximum of two days in a school year. *Education Code 25.087(b-1), (e)*

Military Dependents

A district shall excuse a student whose parent, stepparent, or legal guardian is an active duty member of the uniformed services and has been called to duty for, is on leave from, or immediately returned from continuous deployment of at least four months outside the locality where the parent, stepparent, or guardian regularly resides, to visit with the student's parent, stepparent, or guardian. A district may not excuse a student under this provision more than five days in a school year. An excused absence under this provision must be taken not earlier than the 60th day before the date of deployment or not later than the 30th day after the date of return from deployment. *Education Code 25.087(b-4)* [See FDD]

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Enlistment in Armed
Services

A district shall excuse a student who is 17 years of age or older from attending school to pursue enlistment in a branch of the armed services of the United States or the Texas National Guard, provided that:

1. The district may not excuse for this purpose more than four days of school during the period the student is enrolled in high school; and
2. The district verifies the student's activities related to pursuing enlistment in a branch of the armed services or the Texas National Guard.

A district shall adopt procedures to verify a student's activities as described in these provisions.

Education Code 25.087(b-5), (b-6)

Visit to a Driver's
License Office

A district may excuse a student who is 15 years of age or older from attending school to visit a driver's license office to obtain a driver's license or learner license, provided that the district may not excuse more than one day of school during the period the student is enrolled in high school for each of the following purposes: obtaining a driver's license; or obtaining a learner license. The district must verify the student's visit to the driver's license office in accordance with procedures adopted by the district. *Education 25.087(b-7)*

Taps at Military
Funeral

In addition, a district may excuse a student in grades 6 through 12 for the purpose of sounding "Taps" at a military honors funeral held in this state for a deceased veteran. *Education Code 25.087(c)*

No Penalty

A student whose absence is excused for a reason described beginning at Excused Absences for Compulsory Attendance Determinations, above, may not be penalized for that absence and shall be counted as if the student attended school for purposes of calculating the average daily attendance of students in the district.

Make-Up Work

The student shall be allowed a reasonable time to make up schoolwork missed on the days described above. If the student satisfactorily completes the work, the days of absence shall be counted as days of compulsory attendance.

Education Code 25.087(d)

**Other Excused
Absences**

A person required to attend school may be excused for temporary absence resulting from any cause acceptable to the teacher, principal, or superintendent of the school in which the person is enrolled. *Education Code 25.087(a)*

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Notices to Parents

Warning Notice

A district shall notify a student's parent in writing at the beginning of the school year that, if the student is absent from school on ten or more days or parts of days within a six-month period in the same school year, the student's parent is subject to prosecution under Education Code 25.093, and the student is subject to referral to a truancy court for truant conduct under Family Code 65.003(a).

Notice of Absences

A district shall notify a student's parent if the student has been absent from school, without excuse under Education Code 25.087, on three days or parts of days within a four-week period. The notice must:

1. Inform the parent that:
 - a. It is the parent's duty to monitor the student's school attendance and require the student to attend school;
 - b. The student is subject to truancy prevention measures under Education Code 25.0915; and
2. Request a conference between school officials and the parent to discuss the absences.

The fact that a parent did not receive the notices described above is not a defense for the parent's failure to require a child to attend school nor for the student's failure to attend school.

Education Code 25.095

Non-Attendance

Parent Liability

A parent or person standing in parental relation commits an offense if:

1. A warning notice is issued;
2. The parent with criminal negligence fails to require the child to attend school as required by law; and
3. The child has absences for the amount of time specified under Family Code 65.003(a).

The attendance officer [see FED] or other appropriate school official shall file a complaint against the parent in an appropriate court, as permitted under Education Code 25.093.

*Affirmative
Defense—Parent*

It is an affirmative defense to prosecution that one or more of the absences required to be proven was excused by a school official or should be excused by the court. A decision by the court to excuse an absence for this purpose does not affect the ability of a district to determine whether to excuse the absence for another purpose.

Education Code 25.093

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Student Liability A child engages in truant conduct if the child is required to attend school under the compulsory attendance laws, and fails to attend school on ten or more days or parts of days within a six-month period in the same school year. Truant conduct may be prosecuted only as a civil case in a truancy court. *Family Code 65.003(a)–(b)*

“Child” means a person who is 12 years of age or older and younger than 19 years of age. *Family Code 65.002(1)*

Truancy Courts The following are designated as truancy courts:

1. The constitutional county court in a county with a population of 1.75 million or more;
2. Justice courts; and
3. Municipal courts.

A truancy court has exclusive original jurisdiction over cases involving allegations of truant conduct.

Family Code 65.004(a)–(b)

Affirmative Defense—Student It is an affirmative defense to an allegation of truant conduct that one or more of the absences required to be proven:

1. Have been excused by a school official or by the court;
2. Were involuntary; or
3. Were due to the child’s voluntary absence from the child’s home because of abuse, as defined by Family Code 261.001.

The affirmative defense is not available if, after deducting the absences described above, there remains a sufficient number of absences to constitute truant conduct.

In asserting an affirmative defense, the burden is on the child to show by a preponderance of the evidence that the absence has been or should be excused, was involuntary, or was due to the child’s voluntary absence from the child’s home because of abuse, as defined by Family Code 261.001.

A decision by the court to excuse an absence does not affect the ability of the district to determine whether to excuse the absence for another purpose.

Family Code 65.003(c)–(f)

Truancy Prevention Measures If a student fails to attend school without excuse on three or more days or parts of days within a four-week period but does not fail to attend school for the time described below, the district shall initiate

truancy prevention measures on the student. [See FED] *Education Code 25.0915(a-4)*

District Complaint or Referral

If a student fails to attend school without excuse on ten or more days or parts of days within a six-month period in the same school year, a district shall within ten school days of the student's tenth absence refer the student to a truancy court for truant conduct under Family Code 65.003(a). [See FED] *Education Code 25.0951(a)*

¹ Innovation Plan: <https://www.wacoisd.org>

² TEA *Student Attendance Accounting Handbook*: <https://tea.texas.gov/finance-and-grants/financial-compliance/student-attendance-accounting-handbook>

Note: The Board has adopted an [innovation plan](#)¹ that affects application of provisions in this legally referenced policy.

Additional information regarding attendance accounting requirements is found in the Texas Education Agency's (TEA) [Student Attendance and Accounting Handbook](#).²

Uniform Accounting System

Each district shall use a uniform accounting system adopted by the commissioner for the data required to be reported for the Public Education Information Management System. *Education Code 48.008(b)*

Student Attendance Accounting Handbook

The commissioner will annually establish student attendance accounting guidelines and procedures to be used by a district to maintain records and make reports on student attendance and student participation in special programs.

The standard procedures that a district must use to maintain records and make reports on student attendance and student participation in special programs are described in the official TEA publication *Student Attendance Accounting Handbook*. A copy of the *Student Attendance Accounting Handbook* is available on the TEA website with information related to financial compliance.

Data from previous school years will continue to be subject to the student attendance accounting handbook as the handbook existed in those years.

19 TAC 129.1025

Incentive for Additional Instructional Days

The commissioner shall adjust the average daily attendance of a district under Education Code 48.005 in the manner provided by Education Code 48.0051(b) if the district:

1. Provides the minimum number of minutes of operational and instructional time required under Education Code 25.081 and commissioner rules adopted under that section over at least 180 days of instruction; and
2. Offers an additional 30 days of half-day instruction for students enrolled in prekindergarten through fifth grade.

Education Code 48.0051(a)

Funding for Off-Campus Programs

Funding eligibility for a student participating in an off-campus program will include time instructed in the off-campus program. A campus may choose an alternate attendance-taking time for a group of students that is scheduled to be off-campus during the regular attendance-taking time. The alternate attendance-taking time will be in effect for the period of days or weeks for which the

group is scheduled to be off-campus during the regular attendance-taking time (for example, for the semester or for the duration of employment). This alternate attendance-taking time may not be changed once it is selected for a particular group of students. If attendance is taken at an off-campus location, the district must ensure that attendance is taken in accordance with the *Student Attendance Accounting Handbook*.

For a district to receive FSP funding for a student participating in an off-campus program, the district must have documentation of an agreement between the district and the college.

19 TAC 129.1031(c)–(d) [See EHDD]

[For information regarding funding for virtual instruction and remote learning programs, see EHDE and EHDF.]

Disasters

The commissioner may adjust the average daily attendance of a district all or part of which is located in an area declared a disaster area by the governor under Government Code Chapter 418 if the district experiences a decline in average daily attendance that is reasonably attributable to the impact of the disaster.

The commissioner may make the adjustment under this section for the two-year period following the date of the governor's initial proclamation or executive order declaring the state of disaster.

Education Code 48.006(a), (c)

¹ Innovation Plan: <https://www.wacoisd.org>

² TEA *Student Attendance Accounting Handbook*: <https://tea.texas.gov/finance-and-grants/financial-compliance/student-attendance-accounting-handbook>

Note: See FB for the application of Section 504 of the Rehabilitation Act to students who qualify for individualized health plans.

**Diabetes
Management and
Treatment Plan**

The parent or guardian of a student who will seek care for diabetes while at school or while participating in a school activity, and the physician responsible for the student's diabetes treatment, shall develop a diabetes management and treatment plan (DMTP).

Required Elements

The DMTP must:

1. Identify the health-care services the student may receive at school;
2. Evaluate the student's ability to manage and level of understanding of the student's diabetes; and
3. Be signed by the parent or guardian and the physician.

**Submission to
School**

The parent or guardian must submit the DMTP to the school, and the school must review the plan:

1. Before or at the beginning of the school year;
2. On enrollment of the student, if the student enrolls after the beginning of the school year; or
3. As soon as practicable following a diagnosis of diabetes for the student.

Health and Safety Code 168.002

**Individualized
Health Plan**

Upon receiving the student's DMTP, the school principal, or designee, and the school nurse, if a school nurse is assigned to the school, shall develop an individualized health plan (IHP) for the student. The IHP shall be developed in collaboration with the student's parent or guardian and, to the extent practicable, the physician responsible for the student's diabetes treatment and one or more of the student's teachers.

A student's IHP must incorporate components of the student's DMTP, including the information required under Health and Safety Code 168.002(b) [see Required Elements, above].

Health and Safety Code 168.001(3), .003

**Independent
Monitoring and
Treatment**

In accordance with the student's IHP, a school shall permit the student to attend to the management and care of the student's diabetes, which may include:

1. Performing blood glucose level checks;

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2. Administering insulin through the insulin delivery system the student uses;
3. Treating hypoglycemia and hyperglycemia;
4. Possessing on the student's person at any time any supplies or equipment necessary to monitor and care for the student's diabetes; and
5. Otherwise attending to the management and care of the student's diabetes in the classroom, in any area of the school or school grounds, or at any school-related activity.

Health and Safety Code 168.008

Required Care

Each school shall adopt a procedure to ensure that a school nurse or at least one unlicensed diabetes care assistant (UDCA) is present and available to provide the required care to a student with diabetes during the regular school day. A district may not restrict the assignment of a student with diabetes to a particular campus on the basis that the campus does not have the required UDCA's.
Health and Safety Code 168.007(c)–(d)

If a school nurse is assigned to a campus and the nurse is available, the nurse shall perform the tasks necessary to assist a student with diabetes in accordance with the student's IHP.

School Nurse Not Available

If a school nurse is not assigned to the campus or a school nurse is not available, a UDCA shall perform the tasks necessary to assist the student in accordance with the student's IHP and in compliance with any guidelines provided during UDCA training. A UDCA may perform these tasks only if the parent or guardian of the student signs an agreement that:

1. Authorizes a UDCA to assist the student; and
2. States that the parent or guardian understands that a UDCA is not liable for civil damages [see Immunity from Liability, below].

Health and Safety Code 168.007(a)

If a school nurse is not assigned to a campus:

1. A UDCA must have access to an individual with expertise in the care of persons with diabetes, such as a physician, a registered nurse, a certified diabetes educator, or a licensed dietitian; or

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2. The principal must have access to the physician responsible for the student's diabetes treatment.

Health and Safety Code 168.007(b)

Unlicensed
Diabetes Care
Assistants

At each school in which a student with diabetes is enrolled, the principal, or designee, shall:

1. Seek school employees who are not health-care professionals to serve as UDCA's and to care for students with diabetes; and
2. Make efforts to ensure the school has:
 - a. At least one UDCA if a full-time nurse is assigned to the school; and
 - b. At least three UDCA's if a full-time nurse is not assigned to the school.

"School employee" means a person employed by a school, a local health department that assists the school under Health and Safety Code Chapter 168 (Care of Students with Diabetes), or another entity with whom the school has contracted to perform its duties under that chapter.

"Unlicensed diabetes care assistant" means a school employee who has successfully completed the required training [see UDCA Training, below].

A school employee may not be subject to any penalty or disciplinary action for refusing to serve as a UDCA.

A UDCA shall serve under the supervision of the principal.

Health and Safety Code 168.001(5)–(6), .003–.004

UDCA Training

If a school nurse is assigned to a campus, the nurse shall coordinate the training of school employees acting as UDCA's. Training for UDCA's must be provided by a health-care professional with expertise in the care of persons with diabetes or by a school nurse. The training must include instruction in the elements set forth at Health and Safety Code 168.005(d).

Training must be provided before the beginning of the school year or as soon as practicable following:

1. The enrollment of a student with diabetes at a campus that previously had no students with diabetes; or
2. A diagnosis of diabetes for a student at a campus that previously had no students with diabetes.

The school nurse or principal shall maintain a copy of the training guidelines and any records associated with the training.

Health and Safety Code 168.005

Note: Guidance for the care of students with diabetes is available on the [Texas Department of State Health Services \(TDSHS\) website](https://www.dshs.texas.gov/health-services).¹

Information to
Employees

A district shall provide to each district employee who is responsible for providing transportation for a student with diabetes or supervising a student with diabetes during an off-campus activity a one-page information sheet that:

1. Identifies the student who has diabetes;
2. Identifies potential emergencies that may occur as a result of the student's diabetes and the appropriate responses to such emergencies; and
3. Provide the telephone number of a contact person in case of an emergency involving the student with diabetes.

Health and Safety Code 168.006

Immunity from
Liability

A school employee may not be subject to any disciplinary proceeding, as defined by Education Code 22.0512(b), resulting from any action taken in compliance with Health and Safety Code Chapter 168. The requirements of Chapter 168 are considered to involve the employee's judgment and discretion and are not considered ministerial acts for purposes of immunity under Education Code 22.0511. *Health and Safety Code 168.009(a)* [See DG]

A school nurse is not responsible for and may not be subject to disciplinary action under Occupations Code Chapter 301 for actions performed by a UDCA. *Health and Safety Code 168.009(b)*

A UDCA who assists a student as provided above [see Required Care, above] in compliance with the student's IHP:

1. Is not considered to be engaging in the practice of professional or vocational nursing under Occupations Code Chapter 301 or other state law; and
2. Is exempt from any applicable state law or rule that restricts the activities that may be performed by a person who is not a health-care provider.

A UDCA may exercise reasonable judgment in deciding whether to contact a health-care provider in the event of a medical emergency involving a student with diabetes.

Health and Safety Code 168.007(e)–(f)

**Students at Risk for
Anaphylaxis**

The board shall adopt and administer a policy for the care of students with a diagnosed food allergy at risk for anaphylaxis based on [Guidelines for the Care of Students with Food Allergies at Risk for Anaphylaxis](#)² developed by the commissioner of state health services. A district shall annually review the policy and, as necessary, revise its policy for the care of students with a diagnosed food allergy at risk for anaphylaxis to ensure the policy is consistent with the most current version of the guidelines.

This section does not waive any liability or immunity of the district or its officers or employees or create any liability for or a cause of action against the district or its officers or employees.

Notwithstanding any other law, these provisions do not create a civil, criminal, or administrative cause of action or liability or create a standard of care, obligation, or duty that provides the basis for a cause of action.

Education Code 38.0151(a)–(b), (d), (i)–(j)

A district that provides for the maintenance, administration, and disposal of epinephrine auto-injectors under Education Code Chapter 38, Subchapter E [see FFAC] is not required to comply with Education Code 38.0151. *Education Code 38.0151(f)*

**Website
Requirements**

Each school year, the board shall post a summary of the guidelines on the district's website [see CQA], including instructions on obtaining access to the complete guidelines document. The district's website must be accessible by each student enrolled in the district and a parent or guardian of each student. Any forms used by a district requesting information from a parent or guardian enrolling a child with a food allergy in the district must include information to access on the district's website a summary of the guidelines and instructions on obtaining access to the complete guidelines document. *Education Code 38.0151(g)*

**Seizure Management
and Treatment Plan**

The parent or guardian of a student with a seizure disorder may seek care for the student's seizures while the student is at school or participating in a school activity by submitting to the district at which the student is enrolled a copy of a seizure management and treatment plan developed by the student's parent or guardian and the physician responsible for the student's seizure treatment. The plan must be submitted to and reviewed by the district:

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1. Before or at the beginning of the school year;
2. On enrollment of the student, if the student enrolls in the district after the beginning of the school year; or
3. As soon as practicable following a diagnosis of a seizure disorder for the student.

Plan Requirements

A seizure management and treatment plan must:

1. Identify the health-care services the student may receive at school or while participating in a school activity;
2. Evaluate the student's ability to manage and level of understanding of the student's seizures; and
3. Be signed by the student's parent or guardian and the physician responsible for the student's seizure treatment.

Education Code 38.032(a)–(b)

Immunity

The care of a student with a seizure disorder by a district employee under a seizure management plan submitted under Education Code 38.032 is incident to or within the scope of the duties of the employee's position of employment and involves the exercise of judgment or discretion on the part of the employee for purposes of Education Code 22.0511, regarding immunity from liability.

The immunity from liability provided by Education Code 22.0511 applies to an action or failure to act by a district employee in administering a medication, assisting with self-administration, or otherwise providing for the care of a student under a seizure management plan submitted for the student.

Education Code 38.032(c)–(d)

[See DMA for seizure recognition and related first aid training.]

¹ TDSHS guidance for the care of students with diabetes:

<https://www.dshs.texas.gov/diabetes/diabetes-children>

² TDSHS Guidelines for the Care of Students with Food Allergies at Risk for Anaphylaxis:

<https://www.dshs.texas.gov/sites/default/files/schoolhealth/pdf/FI-NAL%20Guidelines%20for%20Food%20Allergies%203.2023.pdf>

Liaison for Court-Related Students

A district shall appoint at least one educator, as defined by Education Code 5.001(5), to act as a liaison officer for court-related students. The liaison officer shall provide counseling and other services for court-related students and their parents to establish or reestablish normal attendance and progress in school. *Education Code 37.014*

Liaison for Students Who Are Homeless

As a condition of receiving funds under the McKinney-Vento Homeless Assistance Act (McKinney-Vento Act), a district shall designate an appropriate staff person, able to carry out the required duties, as the district liaison for homeless children. A district will adopt policies and practices to ensure participation by the liaison in professional development and other technical assistance activities provided and approved by the statewide coordinator for education of homeless children and youths. *42 U.S.C. 11432(g)(1)(J)* [See FDC for more information regarding McKinney-Vento Act requirements.]

Notice

A district shall inform school personnel, service providers, and advocates working with homeless families, parents and guardians of homeless children, and homeless children of the duties of the liaison. [See FD for definition of "homeless children."]

Duties

The liaison shall ensure that:

1. Homeless children are identified by school personnel and through outreach and coordination activities with other entities and agencies;
2. Homeless children are enrolled in, and have a full and equal opportunity to succeed in, district schools;
3. Homeless families and homeless children have access to and receive educational services for which they are eligible, including services through Head Start programs (including Early Head Start programs) under the Head Start Act, early intervention services under Part C of the Individuals with Disabilities Education Act, and other district preschool programs;
4. Homeless families and homeless children receive referrals to health care, dental, mental health and substance abuse, housing, and other appropriate services;
5. The parents or guardians of homeless children are informed of the available educational and related opportunities and are provided meaningful opportunities to participate in the education of their children;
6. Public notice of the educational rights of homeless children is disseminated in locations frequented by parents or guardians

of such children, and unaccompanied youths, including schools, shelters, public libraries, and soup kitchens, in a manner and form understandable to the parents and guardians of homeless children, and unaccompanied youths;

7. Enrollment disputes are mediated;
8. The parent or guardian of a homeless child, and any unaccompanied youth, are fully informed of all transportation services, including transportation to the school of origin, and are assisted in accessing transportation to the school of enrollment;
9. School personnel providing services under the McKinney-Vento Act receive professional development and other support; and
10. Unaccompanied youths:
 - a. Are enrolled in school;
 - b. Have opportunities to meet the same challenging state academic standards as the state establishes for other children; and
 - c. Are informed of their status as independent students under section 480 of the Higher Education Act of 1965 and that the youths may obtain assistance from the liaison to receive verification of such status for purposes of the Free Application for Federal Student Aid.

42 U.S.C. 11432(g)(6)(A), (B)

Determination of
Homeless Status

A liaison who receives training under 42 U.S.C. 11432(f)(6) may affirm, without further action by the Department of Housing and Urban Development, that a child who is eligible for and participating in a district program, or the immediate family of such a child, who meets the eligibility requirements of the McKinney-Vento Act for an authorized program or service under Title IV of the Act, is eligible for such program or service. *42 U.S.C. 11432(g)(6)(D)*

**Liaison for Children
in State
Conservatorship**

Each district shall appoint at least one employee to act as a liaison officer to facilitate the enrollment in or transfer to a public school of a child in the district who is in the conservatorship of the state and submit the liaison's name and contact information to the Texas Education Agency (TEA) in a format and under the schedule determined by the commissioner of education.

TEA shall provide information to the liaisons on practices for facilitating the enrollment in or transfer to a public school of children who are in the conservatorship of the state.

Education Code 33.904

Transition to Higher Education

A district, in coordination with the Department of Family and Protective Services (DFPS), shall facilitate the transition of each child enrolled in the district who is eligible for a tuition and fee waiver under Education Code 54.366, and who is likely to be in the conservatorship of DFPS on the day preceding the child's 18th birthday to an institution of higher education by:

1. Assisting the child with the completion of any applications for admission or financial aid;
2. Arranging and accompanying the child on campus visits;
3. Assisting the child in researching and applying for private or institution-sponsored scholarships;
4. Identifying whether the child is a candidate for appointment to a military academy;
5. Assisting the child in registering and preparing for college entrance examinations, including, subject to the availability of funds, arranging for the payment of any examination fees by DFPS; and
6. Coordinating contact between the child and a liaison designated by the Higher Education Coordinating Board for students who were formerly in the conservatorship of DFPS.

Family Code 264.1212 [See FFEA]

Transition Assistance for Highly Mobile Students

Definitions

Educational and Course Programs

"Educational and course programs" means programs intended to provide instruction to students in conjunction with or outside of the required curriculum, which may include, but are not limited to, gifted and talented services, bilingual or special language services for emergent bilingual students, career and technical education, and early college high school.

Enrollment Conference

"Enrollment conference" means a student-centered meeting between key district staff and the newly enrolled student and/or the student's parent or guardian that occurs within the first two weeks of enrollment, as soon as feasible, at a new school to collaboratively ease transitions; identify the student's academic strengths and extracurricular interests; introduce school processes and opportunities for engagement; and identify any interventions and additional support services (e.g., special education or Section 504

services, academic and/or behavioral interventions, social and emotional needs, college and career readiness). The student's attendance in the conference should be addressed on a case-by-case basis.

Records

"Records" means documents in printed or electronic form that include, but are not limited to, student transcripts; individual course grades; academic achievement records; course credits, whether full or partial; individualized education program referrals; intervention data; immunizations; state assessment scores; student attendance data; disciplinary reports; graduation endorsements; special education/Section 504 committee records; performance acknowledgements; and personal graduation plans.

Welcome Packet

"Welcome packet" means a compilation of district and community resources provided to new students within the first two weeks of enrollment at a new school that helps to familiarize the student with the school.

19 TAC 89.1601(2), (4), (9), (11)

Transfer of Student
Records

Each district shall ensure that school records for students who are identified as homeless or in substitute care are transferred to the student's new school after receiving a request for records. Student records must be requested, sent, and received using the Texas Records Exchange (TREx) system.

Each district is required to transfer student records within ten working days of receipt of a request from a district to which a student who is homeless or in substitute care enrolls, as required by Education Code 25.002(a-1) [see FD(LEGAL)]. The discretionary authority under Education Code 31.104(d) [see CMD(LEGAL)] to withhold records of a student if the student has not returned or paid for instructional materials or technological equipment does not exempt a district from the mandatory provision to send records to another public school in which the student enrolls.

If a district fails to receive the required information within ten working days, the requesting district may report the noncompliant district to the division responsible for TREx Support at TEA.

Proof of enrollment in a different district permits retroactive withdrawal to the date a student enrolled in the new school. The date of enrollment in the new district is considered the date of withdrawal from the previous district.

19 TAC 89.1603

STUDENT WELFARE
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Systems and
Procedures

A district shall develop systems to ease transition of a student who is homeless or in substitute care during the first two weeks of enrollment at a new school. These systems shall include the following:

1. Welcome packets containing applicable information regarding enrollment in extracurricular activities, club activities, information on fee waivers, tutoring opportunities, the student code of conduct, available student supports, and contact information for key school staff members such as principals, registrars, counselors, designated liaisons, nutrition coordinators, and transportation specialists;
2. Introductions for new students that maintain student privacy and confidentiality to the school environment and school processes by district faculty, campus-based student leaders, or ambassadors; and
3. Mechanisms to ensure that a process is in place for all students who qualify to receive nutrition benefits upon enrollment, as all students who are homeless or in substitute care are eligible for United States Department of Agriculture Child Nutrition Programs. The process must expedite communication with the district nutrition coordinator to ensure that eligible students are not charged in error or experience delays in receiving these benefits.

19 TAC 89.1605(a)

A district must provide professional development opportunities and resources to support key staff members such as principals, registrars, counselors, designated liaisons, nutrition coordinators, and transportation specialists on local processes and procedures for facilitating successful school transitions for students who are homeless or in substitute care.

A district must use the TREx, the Personal Identification Database (PID), or the Person Enrollment Tracking (PET) application to facilitate records transfer and expedite coordination and communication between the sending and receiving schools. In cases where records from the student's previous school are missing or cannot be located, a district should use the Texas Student Data System (TSDS) Unique ID application to identify where the student was previously enrolled.

19 TAC 89.1605(c)–(d)

Enrollment
Conference

A district shall convene an enrollment conference within the first two weeks or as soon as feasible, after a student who is homeless or in substitute care enrolls at a new school. The convening of the

enrollment conference shall not delay or impede the enrollment of the student.

The student's attendance in the conference should be addressed on a case-by-case basis. The enrollment conference may be used in conjunction with an existing meeting that is designed for similar purposes for newly enrolled students.

The enrollment conference shall address the student's credit recovery, credit completion, attendance plans and trauma-informed interventions, interests and strengths, discipline or behavior concerns, previous successes, college readiness, and social and emotional supports as well as district policies relating to transfers and withdrawals and communication preferences with parents or guardians.

The enrollment conference may be comprised of:

1. School administrators;
2. McKinney-Vento or foster care liaisons;
3. Social workers;
4. Teachers;
5. School counselors;
6. Dropout prevention specialists;
7. Attendance/truancy officers;
8. The relative caregiver, foster placement caregiver, or DFPS caseworker;
9. The DFPS designated educational decision-maker;
10. The DFPS caseworker, Court Appointed Special Advocates (CASA) volunteer, or other volunteers, as applicable; and
11. A parent or guardian, unless the caseworker indicates the parent's or guardian's rights to participate have been restricted by the court.

19 TAC 89.1605(b)

Educational
Placement

A district must establish procedures to receive, review, and assess student records for the initial course and educational program placement for a student who is homeless or in substitute care upon enrollment at a new school.

A district must ensure that a student who is homeless or in substitute care has the opportunity to pursue the same endorsement cat-

egories, to the extent possible. If only one endorsement is offered, it must be multidisciplinary studies.

To the extent possible, a district shall ensure the continuation of a student's course and educational programs, if appropriate, from the previous district by placing the student in comparable courses and programs for which they are eligible.

A district shall promote placement in academically challenging and career preparation courses.

19 TAC 89.1609

[For award of credit for students who are homeless or in substitute care, see EI. For special education services for students who are homeless or in substitute care, see EHBAA.]

Access to
Educational and
Extracurricular
Programs and
Courses

A district must develop processes to increase awareness of opportunities available to students who are homeless or in substitute care to participate in extracurricular programs, summer programs, credit transfer services, electronic courses, and after-school tutoring programs.

A district must identify and remove barriers, whenever possible, to participation by students who are homeless or in substitute care in extracurricular programs, summer programs, credit transfer services, electronic courses, and after-school tutoring programs.

Appropriate district staff must facilitate the process to complete and submit a University Interscholastic League (UIL) waiver of residence application form for a student who is homeless and plans to participate in varsity athletics.

In compliance with Education Code 25.001(f) [see FD], a durational residence requirement may not be used to prohibit a student in substitute care from fully participating in any activity sponsored by the district.

19 TAC 89.1611

Postsecondary
Information for
Students who are
Homeless or in
Substitute Care

District counselors or other designated staff shall work with district McKinney-Vento and foster care liaisons to ensure that all students who are identified as homeless or in substitute care graduate with endorsements, if applicable, and have postsecondary plans identified in their personal graduation plans, to the extent required by Education Code 28.02121 [see EIF].

Districts must provide postsecondary counseling in alignment with Education Code 33.007 [see FFEA], for all students, including students who are homeless or in substitute care.

	Districts must connect students to college readiness initiatives, campus visits, and other postsecondary preparation opportunities provided by the district. School counselors must provide information about postsecondary education to the student and the student's parent or guardian during the first school year a student is enrolled in high school and each subsequent year throughout high school. [See FFEA]
<i>Provisions for Students Experiencing Homelessness</i>	McKinney-Vento liaisons must inform unaccompanied homeless youths of their status as independent students for the purpose of applying for financial aid for higher education and provide verification of such status for the Free Application for Federal Student Aid (FASFA), pursuant to 42 United States Code 11432(g)(6)(A)(x)(III). School counselors must assist and advise students experiencing homelessness with college preparation and readiness, pursuant to 42 United States Code 11432(g)(1)(K). <i>19 TAC 89.1613(a)–(b)</i>
<i>Provisions for Students in Substitute Care</i>	A district shall ensure that a student in substitute care who is enrolled in grade 11 or 12 is provided information regarding tuition and fee exemptions under Education Code 54.366, for dual-credit or other courses provided by a public institution of higher education for which a high school student may earn joint high school and college credit. A district shall inform students in substitute care of tuition and fee exemptions under Education Code 54.367, regarding monthly payments, medical assistance benefits, and reimbursement of fees. A district shall ensure students in substitute care are informed that every higher education institution in Texas has a designated foster care liaison to assist students. Foster care liaisons are encouraged to support students in substitute care with linking to colleges to develop connections and facilitate effective transitions into postsecondary education. Foster care liaisons, school counselors, and others must assist students with seeking and applying for all types of scholarships for which the student may qualify. <i>19 TAC 89.1613(c)</i>
Notice of Events for Students in Substitute Care	A district must provide notice in writing to the educational decision-maker and caseworker of a student who is in substitute care regarding events that may significantly impact the education of the student. <i>19 TAC 89.1617</i>

Events that may significantly impact the education of a child include:

1. Requests or referrals for an evaluation under Section 504, Rehabilitation Act of 1973 (29 U.S.C. Section 794), or special education under Education Code 29.003 [see EHBA];
2. Admission, review, and dismissal committee meetings [see EHBAB];
3. Manifestation determination reviews required by Education Code 37.004(b) [see FOF];
4. Any disciplinary actions under Education Code Chapter 37 for which parental notice is required [see FO series];
5. Citations issued for Class C misdemeanor offenses on school property or at school-sponsored activities;
6. Reports of restraint and seclusion required by Education Code 37.0021 [see FO and FOF];
7. Use of corporal punishment as provided by Section 37.0011 [see FO]; and
8. Appointment of a surrogate parent for the child under Education Code 29.0151 [see EHBAE];

Education Code 25.007(b)(10)

**Child Welfare
Contact**

A district receiving Title 1, Part A funds must collaborate with the state or local child welfare agency to designate a point of contact if the child welfare agency notifies the district, in writing, that the agency has designated an employee to serve as a point of contact for the district. *20 U.S.C. 6312(c)(5)(A)*

**School-Community
Guidance Center**

A district may establish a school-community guidance center designed to locate and assist children with problems that interfere with their education, including juvenile offenders and children with severe behavioral problems or character disorders.

Each center shall coordinate efforts of district personnel, local police departments, school attendance officers, and probation officers in working with students, dropouts, and parents in identifying and correcting factors that adversely affect the education of the children.

Education Code 37.051

Upon request from a superintendent, a governmental agency concerned with children that has jurisdiction in a district shall cooperate with the school-community guidance center and shall designate

a liaison to work with the center in identifying and correcting problems affecting school-age children in the district. The governmental agency may establish or finance a school-community guidance center jointly with a district according to terms approved by the governing body of each participating entity. *Education Code 37.053*

Cooperative
Programs

A board may develop cooperative programs with state youth agencies for children found to have engaged in delinquent conduct. *Education Code 37.052*

Parental Notice and
Access to
Information

Before a student is admitted to a school-community guidance center, the administrator of the center shall notify the student's parent or guardian that the student has been assigned to attend the center.

The notice must include:

1. The reason the student has been assigned to the center;
2. A statement that on request the parent or guardian is entitled to be fully informed in writing of any treatment method or testing program involving the student; and
3. A statement that the parent or guardian may request to be advised and to give written, signed consent for any psychological testing or treatment involving the student.

If after notification, the parent refuses to consent to testing or treatment of the student, the center may not provide any further psychological treatment or testing.

A parent or guardian of a student attending a center is entitled to inspect:

1. Any instructional or guidance material to be used by the student, including teachers' manuals, tapes, and films; and
2. The results of any treatment, testing, or guidance method involving the student.

The administrator of the center may set a schedule for inspection of materials that allows reasonable access but does not interfere with the conduct of classes or business activities of the school.

Education Code 37.054

Parental
Involvement

On admitting a student to a school-community guidance center, a representative of a district, the student, and the student's parent or legal guardian shall develop an agreement that specifies the responsibilities of the parent and the student. The agreement must include:

1. A statement of the student's behavioral and learning objectives;
2. A requirement that the parent attend specified meetings and conferences for teacher review of the student's progress; and
3. The parent's acknowledgement that the parent understands and accepts the responsibilities imposed by the agreement regarding attendance at meetings and conferences and assistance in meeting objectives, defined by the district, to aid student remediation.

A superintendent may obtain a court order from a district court in the district requiring a parent to comply with such an agreement. A parent who violates such a court order may be punished for contempt of court.

*Court
Supervision*

If a district, the student, and the parent or guardian for any reason fail to reach an agreement, any party may request the juvenile court or its designee to conduct a hearing and enter an order establishing the responsibilities and duties of each of the parties as the court deems appropriate.

Education Code 37.055–.056

STUDENT WELFARE
FREEDOM FROM BULLYING

FFI
(LEGAL)

Definitions

Bullying

“Bullying”:

1. Means a single significant act or a pattern of acts by one or more students directed at another student that exploits an imbalance of power and involves engaging in written or verbal expression, expression through electronic means, or physical conduct that satisfies the applicability requirements below and that:
 - a. Has the effect or will have the effect of physically harming a student, damaging a student’s property, or placing a student in reasonable fear of harm to the student’s person or of damage to the student’s property;
 - b. Is sufficiently severe, persistent, or pervasive enough that the action or threat creates an intimidating, threatening, or abusive educational environment for a student;
 - c. Materially and substantially disrupts the educational process or the orderly operation of a classroom or school; or
 - d. Infringes on the rights of the victim at school; and
2. Includes cyberbullying.

Cyberbullying

“Cyberbullying” means bullying that is done through the use of any electronic communication device, including through the use of a cellular or other type of telephone, a computer, a camera, electronic mail, instant messaging, text messaging, a social media application, an internet website, or any other internet-based communication tool.

Applicability

These provisions apply to:

1. Bullying that occurs on or is delivered to school property or to the site of a school-sponsored or school-related activity on or off school property;
2. Bullying that occurs on a publicly or privately owned school bus or vehicle being used for transportation of students to or from school or a school-sponsored or school-related activity; and
3. Cyberbullying that occurs off school property or outside of a school-sponsored or school-related activity if the cyberbullying:
 - a. Interferes with a student’s educational opportunities; or

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- b. Substantially disrupts the orderly operation of a classroom, school, or school-sponsored or school-related activity.

Policy

The board shall adopt a policy, including any necessary procedures, concerning bullying that:

1. Prohibits the bullying of a student;
2. Prevents and mediates bullying incidents between students that:
 - a. Interfere with a student's educational opportunities; or
 - b. Substantially disrupt the orderly operation of a classroom, school, or school-sponsored or school-related activity;
3. Prohibits retaliation against any person, including a victim, a witness, or another person, who in good faith provides information concerning an incident of bullying;
4. Establishes a procedure for providing notice of an incident of bullying to:
 - a. A parent or guardian of the alleged victim on or before the third business day after the date the incident is reported; and
 - b. A parent or guardian of the alleged bully within a reasonable amount of time after the incident;
5. Establishes the actions a student should take to obtain assistance and intervention in response to bullying;
6. Sets out the available counseling options for a student who is a victim of or a witness to bullying or who engages in bullying;
7. Establishes procedures for reporting an incident of bullying, including procedures for a student to anonymously report an incident of bullying, investigating a reported incident of bullying, and determining whether the reported incident of bullying occurred;
8. Prohibits the imposition of a disciplinary measure on a student who, after an investigation, is found to be a victim of bullying, on the basis of that student's use of reasonable self-defense in response to the bullying;
9. Requires that discipline for bullying of a student with disabilities comply with applicable requirements under federal law,

including the Individuals with Disabilities Education Act (20 U.S.C. Section 1400 et seq.); and

10. Complies with the minimum standards adopted by the Texas Education Agency (TEA) for a district's policy.

The policy and any necessary procedures must be included annually in the student and employee handbooks and in the district improvement plan under Education Code 11.252. [See BQ]

Note: [Minimum Standards for Bullying Prevention](#)¹ are available on TEA's website.

Internet Posting

The procedure for reporting bullying must be posted on a district's internet website to the extent practicable.

Education Code 37.0832

¹ TEA Minimum Standards for Bullying Prevention:
<https://tea.texas.gov/texas-schools/health-safety-discipline/student-discipline/minimum-standards-for-bullying-prevention>

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Note: This policy addresses bullying of District students. For purposes of this policy, the term bullying includes cyberbullying.

For provisions regarding discrimination and harassment involving District students, see FFH. Note that FFI shall be used in conjunction with FFH for certain prohibited conduct. For reporting requirements related to child abuse and neglect, see FFG.

Bullying Prohibited

The District prohibits bullying, including cyberbullying, as defined by state law. Retaliation against anyone involved in the complaint process is a violation of District policy and is prohibited.

Examples

Bullying of a student could occur by physical contact or through electronic means and may include hazing, threats, taunting, teasing, confinement, assault, demands for money, destruction of property, theft of valued possessions, name calling, rumor spreading, or ostracism.

Minimum Standards

In accordance with law, the Superintendent shall develop administrative procedures to ensure that minimum standards for bullying prevention are implemented.

Retaliation

The District prohibits retaliation by a student or District employee against any person who in good faith makes a report of bullying, serves as a witness, or participates in an investigation.

Examples

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

False Claim

A student who intentionally makes a false claim, offers false statements, or refuses to cooperate with a District investigation regarding bullying shall be subject to appropriate disciplinary action.

Timely Reporting

Reports of bullying shall be made as soon as possible after the alleged act or knowledge of the alleged act. A failure to immediately report may impair the District's ability to investigate and address the prohibited conduct.

**Reporting
Procedures**

Student Report

To obtain assistance and intervention, any student who believes that he or she has experienced bullying or believes that another student has experienced bullying should immediately report the alleged acts to a teacher, school counselor, principal, or other District employee. The Superintendent shall develop procedures allowing a student to anonymously report an alleged incident of bullying.

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Employee Report	Any District employee who suspects or receives notice that a student or group of students has or may have experienced bullying shall immediately notify the principal or designee.
Report Format	A report may be made orally or in writing. The principal or designee shall reduce any oral reports to written form.
Periodic Monitoring	The Superintendent shall periodically monitor the reported counts of bullying incidents, and that declines in the count may represent not only improvements in the campus culture because bullying declines but also declines in the campus culture because of a decline in openness to report incidents.
Notice of Report	When an allegation of bullying is reported, the principal or designee shall notify a parent of the alleged victim on or before the third business day after the incident is reported. The principal or designee shall also notify a parent of the student alleged to have engaged in the conduct within a reasonable amount of time after the incident is reported.
Prohibited Conduct	The principal or designee shall determine whether the allegations in the report, if proven, would constitute prohibited conduct as defined by policy FFH, including dating violence and harassment or discrimination on the basis of race, color, religion, sex, gender, national origin, or disability. If so, the District shall proceed under policy FFH. If the allegations could constitute both prohibited conduct and bullying, the investigation under FFH shall include a determination on each type of conduct.
Investigation of Report	The principal or designee shall conduct an appropriate investigation based on the allegations in the report. The principal or designee shall promptly take interim action calculated to prevent bullying during the course of an investigation, if appropriate.
Concluding the Investigation	Absent extenuating circumstances, the investigation should be completed within ten District business days from the date of the initial report alleging bullying; however, the principal or designee shall take additional time if necessary to complete a thorough investigation. The principal or designee shall prepare a final, written report of the investigation. The report shall include a determination of whether bullying occurred, and if so, whether the victim used reasonable self-defense. A copy of the report shall be sent to the Superintendent or designee.
Notice to Parents	If an incident of bullying is confirmed, the principal or designee shall promptly notify the parents of the victim and of the student who engaged in bullying.

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District Action	If the results of an investigation indicate that bullying occurred, the District shall promptly respond by taking appropriate disciplinary action in accordance with the District's Student Code of Conduct and may take corrective action reasonably calculated to address the conduct. The District may notify law enforcement in certain circumstances.
<i>Bullying</i>	
<i>Discipline</i>	A student who is a victim of bullying and who used reasonable self-defense in response to the bullying shall not be subject to disciplinary action. The discipline of a student with a disability is subject to applicable state and federal law in addition to the Student Code of Conduct.
<i>Corrective Action</i>	Examples of corrective action may include a training program for the individuals involved in the complaint, a comprehensive education program for the school community, follow-up inquiries to determine whether any new incidents or any instances of retaliation have occurred, involving parents and students in efforts to identify problems and improve the school climate, increasing staff monitoring of areas where bullying has occurred, and reaffirming the District's policy against bullying.
<i>Transfers</i>	The principal or designee shall refer to FDB for transfer provisions.
<i>Counseling</i>	The principal or designee shall notify the victim, the student who engaged in bullying, and any students who witnessed the bullying of available counseling options.
<i>Improper Conduct</i>	If the investigation reveals improper conduct that did not rise to the level of prohibited conduct or bullying, the District may take action in accordance with the Student Code of Conduct or any other appropriate corrective action.
Confidentiality	To the greatest extent possible, the District shall respect the privacy of the complainant, persons against whom a report is filed, and witnesses. Limited disclosures may be necessary in order to conduct a thorough investigation.
Appeal	A student who is dissatisfied with the outcome of the investigation may appeal through FNG(LOCAL), beginning at the appropriate level.
Records Retention	Retention of records shall be in accordance with CPC(LOCAL).
Access to Policy and Procedures	This policy and any accompanying procedures shall be distributed annually in the employee and student handbooks. Copies of the policy and procedures shall be posted on the District's website, to the extent practicable, and shall be readily available at each campus and the District's administrative offices.

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Note: For information regarding law enforcement and schools, see GRAA. For information regarding juvenile law enforcement records, see GBA.

Education Records

“Education
Records” Defined

For the purposes of this policy, the term “education records” means those records, files, documents, and other materials that contain information directly related to a student and are maintained by an education agency or institution or by a person acting for such agency or institution.

The term “education records” does not include:

1. Records that are created or received by a district after an individual is no longer a student in attendance and that are not directly related to the individual’s attendance as a student.
2. Records made by district personnel that are kept in the sole possession of the maker, are used only as a personal memory aid, and are not accessible or revealed to anyone other than a temporary substitute for the maker of the record.
3. Records maintained by a law enforcement unit of a district that were created by that law enforcement unit for the purpose of law enforcement.
4. Records on a student who is 18 years of age or older, or who is attending an institution of postsecondary education, that are:
 - a. Made or maintained by a physician, psychiatrist, psychologist, or other recognized professional or paraprofessional acting in his or her professional capacity or assisting in a paraprofessional capacity;
 - b. Made, maintained, or used only in connection with treatment of the student; and
 - c. Disclosed only to individuals providing the treatment. For the purpose of this definition, “treatment” does not include remedial educational activities or activities that are part of the program of instruction at the agency or institution.
5. Grades on peer-graded papers before they are collected and recorded by a teacher.

20 U.S.C. 1232g; 34 C.F.R. 99.3

Screening Records

The principal of each school shall maintain records of screening for special senses and communication disorders, spinal screening,

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and assessment for type 2 diabetes for each student in the school. Records shall be open for inspection by the state or local health department. *20 U.S.C. 1232g; Health and Safety Code 36.006, 37.003, 95.004; 25 TAC 37.145(b)* [See FFAA]

Immunization
Records

A district shall maintain an individual immunization record during the period of attendance for each student admitted. The records shall be open for inspection at all reasonable times by the Texas Education Agency or by representatives of local health departments or the Texas Department of State Health Services. A district shall cooperate with other districts in transferring students' immunization records between other schools. Specific approval from students, parents, or guardians is not required prior to making such record transfers. *Education Code 38.002* [See FFAB]

Medical Records

The parent or guardian of a student is entitled to access to the student's medical records maintained by a district. On request of a student's parent or guardian, a district shall provide a copy of the student's medical records to the parent or guardian. A district may not impose a charge that exceeds the amount authorized by Section 552.261 of the Government Code [see GBAA]. *Education Code 38.0095*

*Privacy Rule for
Non-"Education
Records"*

To the extent a district is a covered entity under the Health Insurance Portability and Accountability Act (HIPAA), the district must comply with the Privacy Rule, 45 C.F.R. Part 164, with respect to protected health information that is not an education record. *45 C.F.R. 160.103, 164.501* [See CRD]

Food Allergy
Information

Information regarding a child's food allergy, regardless of how it is received by the school or school district, shall be retained in the child's student records but may not be placed in the health record maintained for the child by the district.

Exceptions

If the school receives documentation of a food allergy from a physician, that documentation shall be placed in the health record maintained for the child by the district.

A registered nurse may enter appropriate notes about a child's possible food allergy in the health record maintained for the child by the district, including a notation that the child's student records indicate that a parent has notified the district of the child's possible food allergy. [See FD]

Education Code 25.0022(d)–(f)

Assessment
Instruments

The results of individual student performance on basic skills assessment instruments or other achievement tests administered by a district are confidential and may be made available only to the student, the student's parent or guardian, and to the school per-

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sonnel directly involved with the student's educational program. However, overall student performance data shall be aggregated by ethnicity, sex, grade level, subject area, campus, and district, and made available to the public, with appropriate interpretations, at regularly scheduled board meetings. The information may not contain the names of individual students or teachers. *Education Code 39.030(b)* [See EKB]

Academic
Achievement
Record (Grades 9–
12)

Following guidelines developed by the commissioner of education, a district must use an academic achievement record (transcript) form that includes student demographics, school data, student data, and the record of courses and credits earned. The academic achievement record shall serve as the academic record for each student and must be maintained permanently by the district. A district must ensure that copies of the record are made available for a student transferring from one district to another. To ensure appropriate placement of a transfer student, a district must respond promptly to each request for student records from a receiving district. *19 TAC 74.5(b)–(c)* [See EI]

Enrollment Records

If a parent or other person with legal control of a child enrolls the child in a district school, the parent or other person, or the school district in which the child most recently attended school, shall furnish to the district all of the following:

1. The child's birth certificate, or another document suitable as proof of the child's identity as defined by the commissioner in the *Student Attendance Accounting Handbook*.
2. A copy of the child's records from the school the child most recently attended if he or she was previously enrolled in a school in Texas or in another state.

Education Code 25.002(a)

A district must furnish information under items 1 and 2 not later than the tenth working day after the date the district receives a request for the information.

If a parent or other person with legal control of a child under a court order requests that a district transfer a child's student records, the district to which the request is made shall notify the parent or other person as soon as practicable that the parent or other person may request and receive an unofficial copy of the records for delivery in person to a school in another district.

Education Code 25.002(a-1) [See FD]

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**Access, Disclosure,
and Amendment**

Definitions

Attendance

“Attendance” includes, but is not limited to:

1. Attendance in person or by paper correspondence, videoconference, satellite, internet, or other electronic information and telecommunications technologies for students who are not physically present in the classroom; and
2. The period during which a person is working under a work-study program.

*Authorized
Representative*

“Authorized representative” means any entity or individual designated by a state or local educational authority or an agency headed by an official listed in 34 C.F.R. 99.31(a)(3) to conduct—with respect to federal- or state-supported education programs—any audit, evaluation, or any compliance or enforcement activity in connection with federal legal requirements that relate to these programs.

Biometric Record

“Biometric record” means a record of one or more measurable biological or behavioral characteristics that can be used for automated recognition of an individual (e.g., fingerprints, retina and iris patterns, voiceprints, DNA sequence, facial characteristics, and handwriting).

Disclosure

“Disclosure” means to permit access to or the release, transfer, or other communication of personally identifiable information contained in education records by any means, including oral, written, or electronic means, to any party except the party identified as the party that provided or created the record.

*Education
Program*

“Education program” means any program that is principally engaged in the provision of education, including, but not limited to, early childhood education, elementary and secondary education, postsecondary education, special education, job training, career and technical education, and adult education, and any program that is administered by an educational agency or institution.

Parent

“Parent” includes a natural parent, a guardian, or an individual acting as a parent in the absence of a parent or guardian.

*Personally
Identifiable
Information*

“Personally identifiable information” includes, but is not limited to:

1. The student’s name;
2. The name of the student’s parent or other family members;
3. The address of the student or student’s family;
4. A personal identifier, such as the student’s social security number, student number, or biometric record;

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5. Other indirect identifiers, such as the student's date of birth, place of birth, and mother's maiden name;
6. Other information that, alone or in combination, is linked or linkable to a specific student that would allow a reasonable person in the school community, who does not have personal knowledge of the relevant circumstances, to identify the student with reasonable certainty; or
7. Information requested by a person who the district reasonably believes knows the identity of the student to whom the education record relates.

Record

"Record" means any information recorded in any way, including, but not limited to, handwriting, print, computer media, video or audio tape, film, microfilm, and microfiche.

34 C.F.R. 99.3

*Signed and
Dated Written
Consent*

"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; and
2. Indicates such person's approval of the information contained in the electronic consent.

34 C.F.R. 99.30(d)

*Disclosure With
Consent*

The parent or eligible student shall provide a signed and dated written consent before a district discloses personally identifiable information from a student's education records, except as provided by 34 C.F.R. 99.31. The written consent must specify the records that may be disclosed, state the purpose of the disclosure, and identify the part or class or parties to whom the disclosure may be made.

When a disclosure is made under written consent, if a parent or eligible student requests, the district shall provide a copy of the records disclosed and if the parent of a student who is not an eligible student requests, the district shall provide the student with a copy of the records disclosed.

34 C.F.R. 99.30(a)–(c)

Access by Parents

A district shall give full rights under these provisions to either parent, unless the district has been provided with evidence that there is a court order, state statute, or legally binding document relating to such matters as divorce, separation, or custody that specifically revokes these rights. *34 C.F.R. 99.4*

A court may order the custodian of records to delete all references in a child's records to the place of residence of either party appointed as conservator before their release to another party appointed as conservator. *Family Code 153.012*

A parent is entitled to access to all written records of a district concerning the parent's child, including attendance records, test scores, grades, disciplinary records, counseling records, psychological records, applications for admission, health and immunization information, teacher and school counselor evaluations, reports of behavioral patterns, and records relating to assistance provided for learning difficulties, including information collected regarding any intervention strategies used with the child.

"Intervention strategy" means a strategy in a multi-tiered system of supports that is above the level of intervention generally used in that system with all children. The term includes response to intervention and other early intervening strategies.

Education Code 26.004

If the education records of a student contain information on more than one student, the parent or eligible student may inspect and review or be informed of only the specific information about that student. *34 C.F.R. 99.12(a)*

Access by Student

"Eligible student" means a student who has reached 18 years of age or is attending an institution of postsecondary education. *34 C.F.R. 99.3*

When a student becomes an eligible student, the rights accorded to, and consent required of, parents under these provisions transfer from the parents to the student.

Nothing in this provision prevents a district from disclosing education records, or personally identifiable information from education records, to a parent without prior written consent of an eligible student if the disclosure meets the conditions in *34 C.F.R. 99.31(a)*, including if the student is a dependent for tax purposes or in the case of a health or safety emergency.

34 C.F.R. 99.5, .31(a)(8), (a)(10), .36

Disclosure Without
Consent

Personally identifiable information in education records shall not be released without the written consent of the student's parents, except to the following.

School Officials

School officials, including teachers, who have legitimate educational interests.

A contractor, consultant, volunteer, or other party to whom a district has outsourced institutional services or functions may be considered a school official under this paragraph provided that the outside party:

1. Performs an institutional service or function for which the district would otherwise use employees;
2. Is under the direct control of the district with respect to the use and maintenance of education records; and
3. Is subject to the requirements of 34 C.F.R. 99.33(a) governing the use and redisclosure of personally identifiable information from education records.

A district must use reasonable methods to ensure that school officials obtain access to only those education records in which they have legitimate educational interests. A district that does not use physical or technological access controls must ensure that its administrative policy for controlling access to education records is effective and that it remains in compliance with the legitimate educational interest requirement.

34 C.F.R. 99.31(a)(1)

An administrator, nurse, or teacher is entitled to access to a student's medical records maintained by a district for reasons determined by district policy. *Education Code 38.009*

*Officials of Other
Schools*

Officials of educational agencies or institutions, including officials of another school or institution of postsecondary education in which the student seeks or intends to enroll, or where the student is already enrolled so long as the disclosure is for purposes related to the student's enrollment or transfer, provided that a district shall:

1. Make a reasonable attempt to notify the parent or eligible student at the last known address of the parent or eligible student, unless:
 - a. The disclosure is initiated by the parent or eligible student; or
 - b. The annual notification under 34 C.F.R. 99.7 includes a notice that the district forwards education records to other agencies or institutions that have requested the records and in which the student seeks or intends to enroll or is already enrolled so long as the disclosure is for the purposes related to the student's enrollment or transfer;

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2. Give the parent or eligible student, upon request, a copy of the record that was disclosed; and
3. Give the parent or eligible student, upon request, an opportunity for a hearing under 34 C.F.R. Part 99, Subpart C.

34 C.F.R. 99.31(a)(2), .34

*Authorized
Government
Representatives*

Authorized representatives of the officials or agencies headed by the Comptroller General of the United States, the Attorney General of the United States, the Secretary of Education, or state and local educational authorities who require access to student or other records necessary in connection with the audit and evaluation of federal- or state-supported education programs or in connection with the enforcement of or compliance with federal legal requirements that relate to such programs. *34 C.F.R. 99.35(a)(1)*

A district may not refuse to report information concerning a student holding an F, J, or M visa on the basis of the Family Educational Rights and Privacy Act (FERPA) and any regulation implementing FERPA. A district is authorized and required to report information that would ordinarily be protected by FERPA only to the extent required by 8 U.S.C. 1372, 8 C.F.R. 214.3(g), or any corresponding regulation. *8 C.F.R. 214.1(h); 8 U.S.C. 1372(c)(2)*

*Financial Aid
Personnel*

Personnel involved with a student's application for, or receipt of, financial aid. *34 C.F.R. 99.31(a)(4)(i)*

*Juvenile Justice
Officials*

State and local officials to whom such information is specifically allowed to be reported or disclosed by state statute if:

1. The allowed reporting or disclosure concerns the juvenile justice system and its ability to effectively serve, prior to adjudication, the student whose records are released; and
2. The officials and authorities to whom such information is disclosed certify in writing to the district that the information will not be disclosed to any other party except as provided under state law without the prior written consent of the parent of the student.

34 C.F.R. 99.31(a)(5)(i), .38

A school district superintendent or the superintendent's designee shall disclose information contained in a student's educational records to a juvenile service provider as required by Family Code 58.0051 [see GRAC]. *Education Code 37.084(a)*

*Organizations
Conducting
Studies*

Organizations conducting studies for, or on behalf of, districts for the purpose of developing, validating, or administering predictive tests, administering student aid programs, and improving instruc-

tion. Such studies must be conducted in a manner that does not permit personal identification of parents and students by individuals other than representatives of the organization that have legitimate interests in the information. Such information must be destroyed when no longer needed for the original purposes of the studies.

The district must enter into a written agreement with the organization that:

1. Specifies the purpose, scope, and duration of the study or studies and the information to be disclosed;
2. Requires the organization to use personally identifiable information from education records only to meet the purpose or purposes of the study as stated in the written agreement;
3. Requires the organization to conduct the study in a manner that does not permit personal identification of parents and students, as defined in this part, by anyone other than representatives of the organization with legitimate interests; and
4. Requires the organization to destroy all personally identifiable information when the information is no longer needed for the purposes for which the study was conducted and specifies the time period in which the information must be destroyed.

A district that enters into an agreement with an organization conducting a study may redisclose personally identifiable information from education records on behalf of educational agencies and institutions that disclosed the information to the district in accordance with the requirements of 34 C.F.R. 99.33(b).

A district is not required to initiate a study or agree with or endorse the conclusions or results of the study.

34 C.F.R. 99.31(a)(6)(i)-(iv)

*Accrediting
Organizations*

Accrediting organizations to carry out their accrediting functions. *34 C.F.R. 99.31(a)(7)*

*Health or Safety
Emergency*

Appropriate parties, including the student's parents, in connection with an emergency if the knowledge of the information is necessary to protect the health or safety of the student or other individuals.

In making a determination, a district may take into account the totality of the circumstances pertaining to a threat to the health or safety of a student or other individuals. If the district determines that there is an articulable and significant threat to the health or safety of a student or other individuals, it may disclose information from education records to any person whose knowledge of the information is necessary to protect the health or safety of the student

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or other individuals. If, based on the information available at the time of the determination, there is a rational basis for the determination, the United States Department of Education (U.S. ED) will not substitute its judgment for that of the district in evaluating the circumstances and making its determination.

34 C.F.R. 99.31(a)(10), .36(a),(c)

*Agriculture
Secretary*

The Secretary of Agriculture, or authorized representative from the Food and Nutrition Service, for the purposes of conducting program monitoring, evaluations, and performance measurements of districts receiving funding or providing benefits of programs authorized under the National School Lunch Act or the Child Nutrition Act [see COB] for which the results will be reported in an aggregate form, on the conditions as follows:

1. Any data collected under this paragraph shall be protected in a manner that will not permit the personal identification of students and their parents by other than the authorized representatives of the United States Secretary of Education; and
2. Any personally identifiable data shall be destroyed when the data are no longer needed for program monitoring, evaluations, and performance measurements.

20 U.S.C. 1232g(b)(1)(K)

*Child Welfare
Agency*

An agency caseworker or other representative of a state or local child welfare agency or tribal organization, who has the right to access a student's case plan, as defined and determined by the state or tribal organization, when the agency or organization is legally responsible, in accordance with state or tribal law, for the care and protection of the student. Education records, or the personally identifiable information contained in such records, of the student shall not be disclosed by the agency or organization, except to an individual or entity engaged in addressing the student's education needs and authorized by the agency or organization to receive the disclosure. A disclosure must be consistent with state or tribal laws applicable to protecting the confidentiality of a student's education records. *20 U.S.C. 1232g(b)(1)(L)*

*Directory
Information*

Any person requesting directory information after a district has given public notice of that definition. [See Directory Information, below] *34 C.F.R. 99.37*

*Information
Collection*

*U.S. ED–Funded
Surveys (PPRA)*

Under the Protection of Pupil Rights Amendment (PPRA), no student shall be required, as part of any program funded in whole or in part by the U.S. ED, to submit to a survey, analysis, or evaluation that reveals information concerning the following topics without the prior consent of the student (if the student is an adult or emanci-

pated minor), or, in the case of an unemancipated minor, without the prior written consent of the parent:

1. Political affiliations or beliefs of the student or the student's parents.
2. Mental and psychological problems of the student or the student's family.
3. Sex behavior and attitudes.
4. Illegal, anti-social, self-incriminating, and demeaning behavior.
5. Critical appraisals of other individuals with whom students have close family relationships.
6. Legally recognized privileged or analogous relationships, such as those of lawyers, physicians, and ministers.
7. Religious practices, affiliations, or beliefs of the student or student's parent.
8. Income, other than that required by law to determine eligibility for participation in a program or for receiving financial assistance under such program.

20 U.S.C. 1232h(b)

*Funded by Other
Sources*

Except as provided by 20 U.S.C. 1232h(a) or (b), as a condition of receiving funds from programs funded in whole or in part by the U.S. ED, a district shall develop and adopt policies, in consultation with parents, pursuant to 20 U.S.C. 1232h(c)(1), and provide for parent notification in accordance with 20 U.S.C. 1232h(c)(2). *20 U.S.C. 1232h(c)(1)–(4)* [See EF]

*Subpoenaed
Records*

A district shall release student records in compliance with a judicial order, or pursuant to any lawfully issued subpoena, except when a parent is a party to a court proceeding involving child abuse and neglect (as defined in section 3 of the Child Abuse Prevention and Treatment Act [42 U.S.C. 5101 note]) or dependency matters, and the order is issued in the context of that proceeding, additional notice to the parent by the educational agency or institution is not required. *20 U.S.C. 1232g(b)(1)(J), (b)(2)(B)*

The educational agency or institution may disclose information under this section only if the agency or institution makes a reasonable effort to notify the parent or eligible student of the order or subpoena in advance of compliance, so that the parent or eligible student may seek protective action, unless the disclosure is in compliance with:

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1. A federal grand jury subpoena and the court has ordered that the existence or the contents of the subpoena or the information furnished in response to the subpoena not be disclosed;
2. Any other subpoena issued for a law enforcement purpose and the court or other issuing agency has ordered that the existence or the contents of the subpoena or the information furnished in response to the subpoena not be disclosed; or
3. An ex parte court order obtained by the United States attorney general (or designee not lower than an assistant attorney general) concerning investigations or prosecutions of an offense listed in 18 U.S.C. 2332b(g)(5)(B) or an act of domestic or international terrorism as defined in 18 U.S.C. 2331.

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 as plaintiff.

If a parent or eligible student initiates legal action against a district, the district may disclose to the court, without a court order or subpoena, the student's education records that are relevant for the district to defend itself.

34 C.F.R. 99.31(a)(9)

Sex Offenders

A district may disclose personally identifiable information without consent if the disclosure concerns sex offenders and other individuals required to register under section 170101 of the Violent Crime Control and Law Enforcement Act of 1994, 42 U.S.C. 14071, and the information was provided to the district under 42 U.S.C. 14071 and applicable federal guidelines. *34 C.F.R. 99.31(a)(16)*

Request Procedure

Upon request of a properly qualified individual, access to a student's education record shall be granted within a reasonable period of time, but not more than 45 days after it has received the request. A district shall respond to reasonable requests for explanations and interpretations of the records. *34 C.F.R. 99.10*

Records
Destruction

A district shall not destroy any education records if there is an outstanding request to inspect and review the records. *34 C.F.R. 99.10(e)*

De-Identified
Records

A district, or a party that has received education records or information from education records, may release the records or information without the parent's written consent after the removal of all personally identifiable information provided that the district or other party has made a reasonable determination that a student's identity is not personally identifiable, whether through single or multiple

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releases, and taking into account other reasonably available information. *34 C.F.R. 99.31(b)(1)*

*Education
Research*

A district, or a party that has received education records or information from education records, may release de-identified student level data from education records for the purpose of education research by attaching a code to each record that may allow the recipient to match information received from the same source, provided that:

1. A district or other party that releases de-identified data under this section does not disclose any information about how it generates and assigns a record code, or that would allow a recipient to identify a student based on a record code;
2. The record code is used for no purpose other than identifying a de-identified record for purposes of education research and cannot be used to ascertain personally identifiable information about a student; and
3. The record code is not based on a student's social security number or other personal information.

34 C.F.R. 99.31(b)(2)

Authenticating
Requestors'
Identities

A district must use reasonable methods to identify and authenticate the identity of parents, students, school officials, and any other parties to whom the district discloses personally identifiable information from education records. *34 C.F.R. 99.31(c)*

Transfer Not
Permitted

Personal information from student education records shall be transferred to a third party only on the condition that such party will not permit any other party to have access to such information without the written consent of the student's parent. If a third party permits access to information in violation of this policy or fails to destroy the information as required by 20 U.S.C. 1232g(b)(1)(F), a district shall not permit access to information from education records to that third party for a period of not less than five years. *20 U.S.C. 1232g(b)(4)(B); 34 C.F.R. 99.33(a)(1)*

A district shall inform a party to whom a disclosure is made of the requirements of 34 C.F.R. 99.33, unless the disclosure is made pursuant to a court order, lawfully issued subpoena, or litigation; the disclosed information is directory information; the disclosure concerns sex offenders; or the disclosure is made to a parent of a student who is not an eligible student or to a student. *34 C.F.R. 99.33(c)–(d)*

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A district may disclose personally identifiable information with the understanding that the party receiving the information may make further disclosures of the information on behalf of the district if:

1. The disclosures meet the requirements of 34 C.F.R. 99.31; and
2. The district has complied with the requirements of 34 C.F.R. 99.32(b) regarding the record of disclosure; or a state or local educational authority or federal official or agency listed requesting information through a subpoena or ex parte order has complied with the requirements of 34 C.F.R. 99.32(b)(2).

34 C.F.R. 99.33(b)

Record of Access to
Student Records

Each school shall maintain a record, kept with the education record of each student that indicates all individuals, agencies, or organizations that have requested or obtained access to a student's education records, as well as the names of state and local educational authorities and federal officials and agencies listed in 34 C.F.R. 99.31(a)(3) that may make further disclosures of personally identifiable information from the student's education records without consent. A district must obtain a copy of the record of further disclosures maintained by the named authorities, officials, and agencies under 34 C.F.R. 99.32(b)(2) and make it available in response to a parent's request to review the record.

A district must record the following information when it discloses personally identifiable information from education records under the health or safety emergency exception [see Health or Safety Emergency, above]:

1. The articulable and significant threat to the health or safety of a student or other individuals that formed the basis for the disclosure; and
2. The parties to whom the district disclosed the information.

34 C.F.R. 99.32

The records shall include at least the name of the person or agency that made the request and the legitimate interest the person or agency had in the information. The record will be maintained as long as the district maintains the student's education record. The record of access shall be available only to parents, school officials responsible for custody of the records, and those state, local, and federal officials authorized to audit the operation of the system. *20 U.S.C. 1232g(b)(4)(A); 34 C.F.R. 99.33(a)(2)*

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The record shall not include requests for access by, or access granted to, parents of the student or officials of a district, requests accompanied by prior written consent of the parent, requests for directory information, or a party seeking or receiving records in accordance with a subpoena or ex parte order. *34 C.F.R. 99.32(d)*

Right to Amend

The parent of a student whose records are covered by this policy may ask a district to amend the student's record if the parent believes it contains information that is inaccurate, misleading, or in violation of the student's right of privacy or other rights. If a district decides not to amend the education records requested, it shall inform the parent of its decision and his or her right to a hearing to challenge the content of the student's education records. *34 C.F.R. 99.20*

If a district decides to amend the records as a result of the hearing, it shall inform the parent in writing. If, as a result of the hearing, the district decides not to amend the records, it shall inform the parent of the right to place a statement in the records commenting on the contested information and/or stating why the parent disagrees with the decision of the district. Any explanation shall be maintained with the contested part of the record for as long as the record is maintained and shall be disclosed whenever the contested portion of the record is disclosed. *34 C.F.R. 99.21*

Fees for Copies

No fee shall be charged to search for or to retrieve the education records of a student. A fee may be charged for a copy of education records which is made for the parent or an eligible student, unless the imposition of a fee effectively prevents a parent or eligible student from exercising the right to inspect and review those records. *20 U.S.C. 1232g; 34 C.F.R. 99.11; Education Code 26.012*

Records of
Students with
Disabilities

A district shall permit parents to inspect and review education records collected, maintained, or used for purposes of identifying, evaluating, placing, or educating students with disabilities. *34 C.F.R. 300.613(a)*

Access Rights

In addition to policies applicable to all student records, the following guidelines shall apply when parents of a student with disabilities request to review or inspect district records relating to the education of their child:

1. Parents may request that a representative inspect and review the records. *34 C.F.R. 300.613(b)(3)*
2. A district shall comply with a request without unnecessary delay and before any meeting regarding an individualized education program (IEP) or hearing relating to the identification,

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evaluation, or placement of the child, and in no case longer than 45 days after the request. *34 C.F.R. 300.613(a)*

3. A district shall keep a record of persons obtaining access to these student records (except access by parents and authorized employees), including name, date of access, and the purpose for which the person is authorized to use the records. *34 C.F.R. 300.614*

*Record Types
and Locations*

A district shall provide parents on request a list of types and locations of education records. *34 C.F.R. 300.616*

Parental Consent

Parental consent must be obtained before personally identifiable information is used for any purpose other than meeting a requirement under the Individuals with Disabilities Education Act or disclosed to anyone other than officials of agencies collecting or using this information. A district may not release information from these records without parental consent except as provided in FERPA. *34 C.F.R. 300.622*

Confidentiality

A district shall protect the confidentiality of personally identifiable information in collection, storage, disclosure, and destruction of records. One official in a district shall assume responsibility for ensuring confidentiality of personally identifiable information. All persons collecting or using this information shall receive training or instruction concerning the legal requirements involved in handling these records. A district shall maintain for public inspection a current listing of the names and positions of employees who may have access to this information. *34 C.F.R. 300.623*

*Information
Destruction*

A district shall inform parents when personally identifiable information collected, maintained, or used to provide special education and related services is no longer needed to provide educational services to the student. Such information shall be destroyed at the request of the parents.

A permanent record of the student's name, address, phone number, grades, attendance record, classes attended, grade level completed, and year completed may be maintained without time limitation.

34 C.F.R. 300.624

**Annual Notification
of Rights**

A district shall give parents of students in attendance and eligible students in attendance annual notification of their rights under FERPA.

The notice must inform parents or eligible students that they have the right to:

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1. Inspect and review the student's education records;
2. Seek amendment of the student's education records that the parent or eligible student believes to be inaccurate, misleading, or otherwise in violation of the student's privacy rights;
3. Consent to disclosures of personally identifiable information contained in the student's education records, except to the extent that the Act and 34 C.F.R. 99.31 authorize disclosure without consent; and
4. File with the U.S. ED a complaint under 34 C.F.R. 99.63 and 99.64 concerning alleged failures by the district to comply with the requirements of the Act and 34 C.F.R. Part 99.

The notice must include all of the following:

1. The procedure for exercising the right to inspect and review education records.
2. The procedure for requesting amendment of records under 34 C.F.R. 99.20.
3. If the district has a policy of disclosing education records under 34 C.F.R. 99.31(a)(1), a specification of criteria for determining who constitutes a school official and what constitutes a legitimate educational interest.

A district may provide this notice by any means that are reasonably likely to inform the parents or eligible students of their rights.

A district shall effectively notify parents who are disabled and parents of students who have a primary or home language other than English.

20 U.S.C. 1232g(e); 34 C.F.R. 99.7

**Directory
Information**

"Directory
Information"
Defined

"Directory information" means information contained in an education record of a student that would not generally be considered harmful or an invasion of privacy if disclosed. Directory information includes the student's name, address, telephone listing, electronic mail address, photograph, date and place of birth, dates of attendance, grade level, enrollment status, participation in officially recognized activities and sports, weight and height of members of athletic teams, honors and awards received, and the most recent educational agency or institution attended. "Directory information" does not include a student's:

1. Social security number; or
2. Student identification (ID) number, unless:

- a. The student ID number, user ID number, or other unique personal identifier used by a student for purposes of accessing or communicating in electronic systems cannot be used to gain access to education records except when used in conjunction with one or more factors that authenticate the user's identity, such as a personal identification number (PIN), password, or other factor known or possessed only by the authorized user; or
- b. The student ID number or other unique personal identifier that is displayed on a student ID badge cannot be used to gain access to education records except when used in conjunction with one or more factors that authenticate the user's identity, such as a PIN, password, or other factor known or possessed only by the authorized user.

34 C.F.R. 99.3

*Disclosure of
Directory
Information*

A district may release directory information if it has given public notice to parents of students in attendance and eligible students in attendance at the district of:

1. The types of personally identifiable information that it has designated as directory information.
2. A parent's or eligible student's right to refuse to let the district designate any or all of those types of information about the student as directory information.
3. The period of time within which the parent has to notify the district in writing that he or she does not want any or all of those types of information about the student designated as directory information.

*Restrictions on
the Right of
Refusal*

A parent or eligible student may not use the right of refusal to opt out of directory information disclosures to prevent a district from disclosing or requiring a student to disclose the student's name, identifier, or institutional email address in a class in which the student is enrolled or to prevent a district from requiring a student to wear, to display publicly, or to disclose a student ID card or badge that exhibits information that may be designated as directory information and that has been properly designated by the district as directory information in the public notice provided under this section.

Former Students

A district may disclose directory information about former students without satisfying the public notice conditions above. However, the district must continue to honor any valid request to opt out of the disclosure of directory information made while a student was in attendance unless the student rescinds the opt-out request.

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Confirmation of Identity or Records	A district may not disclose or confirm directory information without meeting the written consent requirements in 34 C.F.R. 99.30 if a student's social security number or other non-directory information is used alone or combined with other data elements to identify or help identify the student or the student's records. <i>34 C.F.R. 99.3, .37</i>
Homeless Students	Information about a homeless child's living situation shall be treated as a student education record, and shall not be deemed to be directory information. <i>42 U.S.C. 11432(g)(3)(G)</i>
<i>Directory Information Designation</i>	A district may designate as directory information any or all information defined as directory information by FERPA. Directory information under that Act that is not designated by a district as directory information for that district is excepted from disclosure by the district under Government Code Chapter 552. [See GBA] Directory information consented to by a parent for use only for a limited school-sponsored purpose, such as for a student directory, student yearbook, or district publication, if any such purpose has been designated by a district, remains otherwise confidential and may not be released under Government Code Chapter 552.
<i>Annual Notice</i>	A district shall provide the following to the parent of each district student, at the beginning of each school year or on enrollment of the student after the beginning of the school year: 1. A written explanation of the provisions of FERPA regarding the release of directory information about the student; and 2. Written notice of the right of the parent to object to the release of directory information about the student under FERPA.
Contents	The notice must contain: 1. The following statement in boldface type that is 14-point or larger: "Certain information about district students is considered directory information and will be released to anyone who follows the procedures for requesting the information unless the parent or guardian objects to the release of the directory information about this student. If you do not want [insert name of district] to disclose directory information from your child's education records without your prior written consent, you must notify the district in writing by [insert date]. [Insert name of district] has designated the following information as directory information: [Here the district must include any directory information it chooses to designate as directory information for the district, such as a student's name, address, telephone listing, electronic mail address, photograph, degrees, honors,

and awards received, date and place of birth, major field of study, dates of attendance, grade level, most recent education institution attended, participation in officially recognized activities and sports, and the weight and height of members of athletic teams.]”;

2. A form, such as a check-off list or similar mechanism, that:
 - a. Immediately follows, on the same page or the next page, the required statement; and
 - b. Allows a parent to record:
 - (1) The parent’s objection to the release of all directory information or one or more specific categories of directory information if district policy permits the parent to object to one or more specific categories of directory information;
 - (2) The parent’s objection to the release of a secondary student’s name, address, and telephone number to a military recruiter or institution of higher education; and
 - (3) The parent’s consent to the release of one or more specific categories of directory information for a limited school-sponsored purpose if such purpose has been designated by the district and is specifically identified, such as for a student directory, student yearbook, or district publication; and
3. A statement that federal law requires districts receiving assistance under the Elementary and Secondary Education Act of 1965 to provide a military recruiter or an institution of higher education, on request, with the name, address, or telephone number of a secondary student unless the parent has advised the district that the parent does not want the student’s information disclosed without the parent’s prior written consent.

Education Code 26.013

*Student
Recruiting
Information*

Notwithstanding the Directory Information provisions above, each district receiving assistance under the Elementary and Secondary Education Act of 1965 (ESEA) shall provide, on a request made by a military recruiter or an institution of higher education, access to secondary school students’ names, addresses, and telephone listings unless a student’s parent has submitted the prior consent request below.

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Consent to
Release

A student who has attained 18 years of age or a parent of a secondary school student may submit a written request to a district that the student's name, address, and telephone listing not be released for purposes described above without prior written consent. Upon receiving such request, a district may not release the student's name, address, and telephone listing for such purposes without the prior written consent of the parent or student. A district shall notify parents of the option to make a request.

No Opt-In
Process

Nothing in this provision shall be construed to allow a district to withhold access to a student's name, address, and telephone listing from a military recruiter or institution of higher education by implementing an opt-in process or any other process other than the written consent request process above.

20 U.S.C. 7908

A district shall:

1. Provide to military recruiters the same access to secondary school students as is provided generally to postsecondary educational institutions or to prospective employers of those students; and
2. Upon a request made by military recruiters for military recruiting purposes, provide access to secondary school student names, addresses, electronic mail addresses (which shall be the electronic mail addresses provided by the school, if available), and telephone listings, notwithstanding directory information requirements in FERPA [see above].

A district shall notify parents of their right to submit a request to the district that the student's name, address, electronic mail address, and telephone listing not be released.

10 U.S.C. 503(c)(1)(A)–(B) [See also GKC]

**Videotapes and
Recordings**

A district employee must obtain the written consent of a child's parent before the employee may make or authorize the making of a videotape of a child or record or authorize the recording of a child's voice.

Exceptions

A district employee is not required to obtain the consent of a child's parent before the employee may make a videotape of a child or authorize the recording of a child's voice if the videotape or voice recording is to be used only for:

1. The purposes of safety, including the maintenance of order and discipline in common areas of the school or on school buses;

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2. A purpose related to a cocurricular or extracurricular activity;
3. A purpose related to regular classroom instruction;
4. Media coverage of the school; or
5. A purpose related to the promotion of student safety under Education Code 29.022.

Education Code 26.009 [See EHA, EHBAF, FM, and FO]

Please Note: This manual does not have policies in all codes. The coding structure is common to all TASB manuals and is designed to accommodate expansion of both (LEGAL) and (LOCAL) policy topics and administrative regulations.

SECTION G: COMMUNITY AND GOVERNMENTAL RELATIONS

GA ACCESS TO PROGRAMS, SERVICES, AND ACTIVITIES

GB PUBLIC INFORMATION PROGRAM

GBA Access to Public Information

GBAA Requests for Information

GBB School Communications Program

GBBA News Media Relations

GC PUBLIC NOTICES

GE RELATIONS WITH PARENT ORGANIZATIONS

GF PUBLIC COMPLAINTS

GK COMMUNITY RELATIONS

GKA Conduct on School Premises

GKB Advertising and Fundraising

GKC Visitors

GKD Nonschool Use of School Facilities

GKDA Distribution of Nonschool Literature

GKE Business, Civic, and Youth Groups

GKF Cultural Institutions

GKG School Volunteer Program

GN RELATIONS WITH EDUCATIONAL ENTITIES

GNA Other Schools and Districts

GNB Regional Education Service Centers

GNC Colleges and Universities

GND State Education Agency

GNE Education Accreditation Agencies

GR RELATIONS WITH GOVERNMENTAL ENTITIES

GRA State and Local Governmental Authorities

GRAA Law Enforcement Agencies

GRAC Juvenile Service Providers

GRB Interlocal Cooperation Contracts

GRC Emergency Management

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**Public Information
Defined**

For purposes of Government Code Chapter 552 (Public Information Act), "public information" means information that is written, produced, collected, assembled, or maintained under a law or ordinance or in connection with the transaction of official business:

1. By a board;
2. For a board and the board:
 - a. Owns the information;
 - b. Has a right of access to the information; or
 - c. Spends or contributes public money for the purpose of writing, producing, collecting, assembling, or maintaining the information; or
3. By an individual officer or employee of a district in the officer's or employee's official capacity and the information pertains to official business of the district.

"Official business" means any matter over which the board or district has any authority, administrative duties, or advisory duties.

Information is "in connection with the transaction of official business" if the information is created by, transmitted to, received by, or maintained by an officer or employee of the district in the officer's or employee's official capacity, or a person or entity performing official business or a governmental function on behalf of a district, and pertains to official business of the district.

The definition of "public information" above applies to and includes any electronic communication created, transmitted, received, or maintained on any device if the communication is in connection with the transaction of official business.

Gov't Code 552.002(a)–(a-2), .003(2-a)

**Forms of Public
Information**

The general forms in which the media containing public information exist include a book, paper, letter, document, email, internet posting, text message, instant message, other electronic communication, printout, photograph, film, tape, microfiche, microfilm, photo-stat, sound recording, map, and drawing and a voice, data, or video representation held in computer memory.

The media on which public information is recorded include:

1. Paper;
2. Film;
3. A magnetic, optical, solid state, or other device that can store an electronic signal;

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4. Tape;
5. Mylar; and
6. Any physical material on which information may be recorded, including linen, silk, and vellum.

Gov't Code 552.002(b)–(c)

**Preservation of
Information**

A district may determine a time for which information that is not currently in use will be preserved, subject to any applicable rule or law governing the destruction and other disposition of state and local government records or public information.

The provisions of Chapter 441, Government Code and Title 6, Local Government Code (Local Government Records Act), governing the preservation, destruction, or other disposition of records or public information apply to records and public information held by a temporary custodian.

Gov't Code 552.004(a), (c) [See BBI, CPC, DH]

**Temporary
Custodians**

“Temporary custodian” means an officer or employee of a district who, in the transaction of official business, creates or receives public information that the officer or employee has not provided to the officer for public information or the officer’s agent. The term includes a former officer or employee who created or received public information in the officer’s or employee’s official capacity that has not been provided to the officer for public information or the officer’s agent. *Gov't Code 552.003(7)*

**Ownership of Public
Information**

A current or former board member or employee of a district does not have, by virtue of the board member’s or employee’s position or former position, a personal or property right to public information the board member or employee created or received while acting in an official capacity.

**Surrender or Return
of Public
Information**

A temporary custodian with possession, custody, or control of public information shall surrender or return the information to the district not later than the 10th day after the date the officer for public information or the officer’s agent requests the temporary custodian to surrender or return the information.

***Disciplinary
Action***

A temporary custodian’s failure to surrender or return public information as required is grounds for disciplinary action by the district or any other applicable penalties provided by the Public Information Act or other law.

Gov't Code 552.233

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Note: For forms prescribed by the attorney general, see the [Attorney General's Public Information website](#).¹

Public Information

See GB(LEGAL) for the definition of public information.

Availability of Public Information

Public information is available to the public at a minimum during the normal business hours of a district. Government Code Chapter 552 (Public Information Act [PIA]) does not authorize the withholding of public information or limit the availability of public information to the public, except as expressly provided by the PIA. *Gov't Code 552.006, .021*

Special Rights of Access

Person Whose Information the District Holds

A person or a person's authorized representative has a special right of access, beyond the right of the general public, to information held by the district that relates to the person and that is protected from public disclosure by laws intended to protect that person's privacy interests. A district may not deny this access on the grounds that the information is considered confidential by privacy principles under the Public Information Act but may assert as grounds for denial other provisions of the PIA or other law not intended to protect the person's privacy interests. Access to information under this provision shall be provided in the manner prescribed by Government Code 552.229 (consent to release) and 552.307 (timely release), below. *Gov't Code 552.023(a), (b), (e)*

Board Members

For information on board members' special access rights to district information, see BBE.

Parents

A district that receives a request from a parent for public information relating to the parent's child shall comply with the Public Information Act. *Education Code 26.0085(e)*

For information on parents' special access rights to their child's education records, see FL.

Information That Must Be Disclosed

The following categories of information are public information and not excepted from required disclosure unless made confidential under the Public Information Act or other law:

1. A completed report, audit, evaluation, or investigation made of, for, or by a board or district, except as provided in Government Code 552.108.
2. The name, sex, ethnicity, salary, title, and dates of employment of each employee and officer of a district.
3. Information in an account, voucher, or contract relating to the receipt or expenditure of public or other funds by a board.

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4. The name of each official and the final record of voting on all proceedings of a board.
5. All working papers, research material, and information used to estimate the need or expenditure of public funds or taxes by a board, on completion of the estimate.
6. A description of a district's central and campus organization, including where, from whom, and how the public may obtain information, submit information or requests, and obtain decisions.
7. A statement of the general course and method by which a district's functions are channeled and determined, including the nature and requirements of all formal and informal policies and procedures.
8. A rule of procedure, a description of forms available or the places at which forms may be obtained, and instructions relating to the scope and content of all papers, reports, or examinations.
9. A substantive rule of general applicability adopted or issued by a board as authorized by law, and a statement of general policy or interpretation of general applicability formulated and adopted by the board.
10. Each amendment, revision, or repeal of the information described in items 6–9.
11. Final opinions and orders issued in the adjudication of cases.
12. A policy statement or interpretation adopted or issued by a board.
13. Administrative manuals and instructions to staff that affect a member of the public.
14. Information regarded as open to the public under a district's policies.
15. Information that is in a bill for attorney's fees and that is not privileged under the attorney-client privilege.
16. Information that is also contained in a public court record.
17. A settlement agreement to which a board is a party.

Gov't Code 552.022

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Contracting Information	Contracting information, as that term is defined in Government Code 552.003(1-a) [see GBAA], is public and must be released unless excepted from disclosure under the Public Information Act. The exceptions to disclosure provided by Government Code 552.110 (trade secrets) and 552.1101 (proprietary information) do not apply to the types of contracting information listed at Government Code 552.0222(b). <i>Gov't Code 552.0222(a), (b)</i> [See GBAA for additional procedures related to contracting information.]
Investment Information	Certain categories of information held by a district relating to its investments, as specified by Government Code 552.0225(b), are public information and not excepted from disclosure under the Public Information Act. <i>Gov't Code 552.0225</i>
Confidential Information That Must Not Be Disclosed	A person commits an offense if the person distributes information considered confidential under the terms of the Public Information Act. A violation under this provision also constitutes official misconduct. <i>Gov't Code 552.352</i>
Confidential by Law	Information is excepted from public disclosure if it is information considered to be confidential by law, either constitutional, statutory, or by judicial decision. <i>Gov't Code 552.101</i>
Note: For confidentiality and access provisions addressed by specific statutes other than Government Code Chapter 552 (Public Information Act), see the applicable policy code.	
Privileged Attorney-Client Information	The Texas Rules of Civil Procedure and the Texas Rule of Evidence are "other law" within the meaning of Government Code 552.022 (allowing "other law" to make information confidential from required disclosure). A district does not forfeit the attorney-client privilege by failing to timely request an attorney general's decision, and the privilege is sufficiently compelling to rebut the presumption of public disclosure after an untimely request. <i>In re City of Georgetown</i>, 53 S.W.3d 328, 336 (Tex. 2001); <i>Paxton v. City of Dallas</i>, 509 S.W.3d 247 (Tex. 2017) The attorney-client privilege does not apply if the attorney or attorney's representative acts in a capacity other than that of providing or facilitating professional legal services to the client. <i>Harlandale Indep. Sch. Dist. V. Cornyn</i>, 25 S.W.3d 328 (Tex. App.—Austin 2000, pet. Denied)
Closed Meeting Records	The certified agenda or tape recording of a closed meeting is available for public inspection only under a court order issued in litigation in a district court involving an alleged violation of the Open Meetings Act. <i>Gov't Code 551.104(c)</i> ; <i>Atty. Gen. ORD 684 (2009)</i>

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[For information regarding minutes or recording of an open meeting, see BE.]

Student Education
Records

The Public Information Act does not require the release of information contained in education records of the district, except in conformity with the Family Educational Rights and Privacy Act of 1974, 20 U.S.C. Section 1232g (FERPA).

In this provision, "student record" means information that constitutes education records as that term is defined by FERPA or information in a record of an applicant for admission to an educational institution, including a transfer applicant.

Information is confidential and excepted from required disclosure if it is information in a student record at a district.

The district is not prohibited from disclosing or providing information included in an education record if the disclosure or provision is authorized by FERPA or other federal law. In addition, a student record shall be made available on the request of district personnel, the student, the student's parents, legal guardian, or spouse, or a person conducting a child abuse investigation required by Family Code Chapter 261, Subchapter D.

Except as provided by Government Code 552.114(e) (information in enrollment or transfer records, below), a district may redact information in a student record from information required to be disclosed under the Public Information Act without requesting a decision from the attorney general.

Gov't Code 552.026, .114 [See FL]

*Enrollment or
Transfer
Information*

If an applicant, or a parent or legal guardian of a minor applicant, for admission to an educational institution funded wholly or partly by state revenue requests information in the record of the applicant, the district shall disclose any information that is related to the application for admission and was provided to the district by the applicant. *Gov't Code 552.114(e)*

*Student Victim
Information*

The name of a person who is enrolled in a public or private primary or secondary school and involved in an improper relationship with an educator as provided by Penal Code 21.12(a) may not be released to the public and is not public information subject to disclosure. *Penal Code 21.12(d)*

The name of a student or minor who is the victim of abuse or unlawful conduct by an educator is not public information subject to disclosure. *Education Code 21.006(h)*

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Juvenile Law
Enforcement
Records

Except as provided by Family Code 58.008(c) (person with a determinate sentence), law enforcement records concerning a child, as defined by Family Code 51.02(2), and information concerning a child that are stored by electronic means or otherwise and from which a record could be generated may not be disclosed to the public. *Family Code 58.008(b)*

Law enforcement records concerning a child may be inspected or copied by:

1. A juvenile justice agency, as defined by Family Code 58.101;
2. A criminal justice agency, as defined by Government Code 411.082;
3. The child;
4. The child's parent or guardian; or
5. The chief executive officer or the officer's designee of a primary or secondary school where the child is enrolled only for the purpose of conducting a threat assessment or preparing a safety plan related to the child. [See FFB]

Family Code 58.008(d), (d-1)

Exclusions

These provisions do not apply to a record relating to a child that is required or authorized to be maintained under the laws regulating the operation of motor vehicles in Texas or subject to disclosure under Code of Criminal Procedure Chapter 62 (registered sex offenders). *Family Code 58.008(a)*

Certain Personnel
Information

Note: For previous determinations by the attorney general allowing governmental bodies to withhold specific categories of information in personnel records, including direct deposit forms; employment forms I-9, W-2, W-4; and fingerprints, without the necessity of requesting an attorney general decision, see Attorney General Open Records Decision (ORD) 684 (2009).

*Employee Social
Security Numbers*

The social security number of an employee of a district in the custody of the district is confidential. *Gov't Code 552.147(a-1)*

*Invasion of
Privacy*

Information is excepted from public disclosure if it is information in a personnel file, the disclosure of which would constitute a clearly unwarranted invasion of personal privacy, except that all information in the personnel file of a district employee is to be made available to that employee or the employee's designated representative as public information is made available under the Public Information Act. The exception to public disclosure created by this provi-

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sion is in addition to any exception created by Government Code 552.024. Public access to personnel information covered by Government Code 552.024 is denied to the extent provided by that provision. *Gov't Code 552.102(a)*

*Employee Birth
Dates*

Disclosure of employee birth dates would constitute a clearly unwarranted invasion of personal privacy, and thus such dates are excepted from disclosure under Government Code 552.102(a). *Texas Comptroller of Public Accts. v. Atty. Gen'l of Texas*, 354 S.W.3d 336 (Tex. 2010)

*College
Transcripts*

Information is excepted from public disclosure if it is a transcript from an institution of higher education maintained in the personnel file of a professional employee, except that this provision does not exempt from disclosure the degree obtained or the curriculum on a transcript in the personnel file of the employee. *Gov't Code 552.102(b)*

Evaluations

A document evaluating the performance of a teacher or administrator is confidential and is not subject to disclosure under the Public Information Act.

At the request of a school district, open-enrollment charter school, or private school at which a teacher or administrator has applied for employment, a district shall give the requesting district or school a document evaluating the performance of a teacher or administrator employed by the school.

A district shall give the Texas Education Agency (TEA) a document evaluating the performance of a teacher or administrator employed by the district for purposes of an investigation conducted by TEA.

Education Code 21.355(a), (c), (d)

*Educator
Certification
Exam*

The results of an educator certification examination are confidential and are not subject to disclosure, unless the disclosure is regarding notification to a parent of the assignment of an uncertified teacher to a classroom as required by Education Code 21.057. *Education Code 21.048(c-1)*

*Employee
Accused of
Improper
Relationship with
Student*

A primary or secondary school may not release externally to the general public the name of an employee who is accused of committing an offense under Penal Code 21.12 (improper relationship between educator and student) until the employee is indicted for the offense. The school may release the name of the accused employee regardless of whether the employee has been indicted for the offense as necessary for the school to:

1. Report the accusation:

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- a. To TEA, another state agency, or local law enforcement or as otherwise required by law; or
- b. To the school's community in accordance with the school's policies or procedures; or

2. Conduct an investigation of the accusation.

Penal Code 21.12(d-1)

Credit Card, Debit Card, Charge Card, and Access Device Numbers

A credit card, debit card, charge card, or access device number that is collected, assembled, or maintained by or for a district is confidential.

"Access device" means a card, plate, code, account number, personal identification number, electronic serial number, mobile identification number, or other telecommunications service, equipment, or instrument identifier or means of account access that alone or in conjunction with another device may be used to:

1. Obtain money, goods, services, or another thing of value; or
2. Initiate a transfer of funds other than a transfer originated solely by paper instrument.

A district may redact credit card, debit card, charge card, or access device numbers from any information the district discloses without the necessity of requesting a decision from the attorney general. The district shall provide the information required by Government Code 552.136(e) to the requestor on a form prescribed by the attorney general. The requestor is entitled to seek a decision from the attorney general about the matter.

Gov't Code 552.136

Email Addresses of the Public

An email address of a member of the public that is provided for the purpose of communicating electronically with a district is confidential and not subject to disclosure unless the member of the public affirmatively consents to its release.

This confidentiality does not apply to an email address:

1. Provided to a district by a person who has a contractual relationship with the district or by the contractor's agent;
2. Provided to a district by a vendor who seeks to contract with the district or by the vendor's agent;
3. Contained in a response to a request for bids or proposals, contained in a response to similar invitations soliciting offers or information relating to a potential contract, or provided to a

district in the course of negotiating the terms of a contract or potential contract;

4. Provided to a district on a letterhead, coversheet, printed document, or other document made available to the public; or
5. Provided to a district for the purpose of receiving orders or decisions from the district, or for the purpose of providing public comment on or receiving notices related to an application for a license. A "license" under this provision includes a state agency permit, certificate, approval, registration, or similar form of permission required by law.

A district may also disclose an email address for any reason to another governmental body or to a federal agency.

Gov't Code 552.137, 2001.003(2); Atty. Gen. ORD 684 (2009)

Individuals Who
Inform of Legal
Violations

An informer's name or information that would substantially reveal the identity of an informer is excepted from public disclosure.

"Informer" means a student or former student or an employee or former employee of a district who has furnished a report of another person's possible violation of criminal, civil, or regulatory law to the district or the proper regulatory enforcement authority.

This exception does not apply if the informer:

1. If the informer is a student or former student, and the student, student's legal guardian, or student's spouse consents to disclosure of the student's name;
2. If the informer is an employee or former employee who consents to disclosure of the employee's name; or
3. The informer planned, initiated, or participated in the possible violation.

Information may be made available to a law enforcement agency or prosecutor for official purposes upon proper request, made in compliance with applicable law and procedure. However, this exception does not impair the confidentiality of information considered to be confidential by law, including information excepted from disclosure under the Public Information Act.

Gov't Code 552.135

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Crime Victim
Information

*Address
Confidentiality
Program*

Information relating to a participant in the Address Confidentiality Program for Certain Crime Victims (including from family violence, sexual assault or abuse, stalking, or trafficking of persons under Code of Criminal Procedure Chapter 58, Subchapter B) is confidential, except as provided by Code of Criminal Procedure 58.061, and may not be disclosed under the Public Information Act. *Code of Criminal Procedure 58.060*

*Employee
Victims*

A district employee who is a victim under Code of Criminal Procedure Chapter 56B (Crime Victims' Compensation Act) regardless of whether the employee has filed an application for compensation may elect whether to allow public access to information held by the district that would identify or tend to identify the victim, including a photograph or other visual representation of the victim. The election must be made in writing on a form developed by the district, signed by the employee, and filed with the district before the third anniversary of the latest to occur of one of the following:

1. The date the crime was committed;
2. The date employment begins; or
3. The date the district develops the form and provides it to employees.

If the employee fails to make an election, the identifying information is excepted from disclosure until the third anniversary of the date the crime was committed. In case of disability, impairment, or other incapacity of the employee, the election may be made by the guardian of the employee or former employee.

Gov't Code 552.132(d)

*Victims of Certain
Crimes*

Information is confidential and excepted from public disclosure if the information identifies an individual as a victim of:

1. A criminal offense specified by Government Code 552.1315(a)(1)(A) and (B), or
2. Any criminal offense if the victim was younger than 18 years of age when any element of the offense was committed.

Notwithstanding the above, information may be disclosed:

1. To any victim identified by the information;
2. To the parent or guardian of a victim described by item 2 above who is identified by the information;
3. To a law enforcement agency for investigative purposes; or

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4. In accordance with a court order requiring the disclosure.

Gov't Code 552.1315

Location or Layout
of Shelter Centers

Information that relates to the location or physical layout of a family violence shelter center or victims of trafficking shelter center is confidential. A district may redact this information from any information the district discloses without the necessity of requesting a decision from the attorney general. If a district redacts information under this provision, the district shall provide the information required by Government Code 552.138(e) to the requestor on a form prescribed by the attorney general. The requestor is entitled to seek a decision from the attorney general about the matter. *Gov't Code 552.138(b-1), (c), (d)*

Criminal History
Records

Information collected to comply with Education Code Chapter 22, Subchapter C (criminal records), including the person's name, address, phone number, social security number, driver's license number, other identification number, and fingerprint records, is confidential and may not be released except to comply with Subchapter C, by court order, or with the consent of the person who is the subject of the information. *Education Code 22.08391*

Criminal history record information obtained by the district from the Texas Department of Public Safety may not be disclosed to any person except:

1. The person who is the subject of the information;
2. TEA;
3. The State Board for Educator Certification;
4. The chief personnel officer of the transportation company if the information was obtained under Government Code 411.097(a)(2) with respect to a transportation company that contracts with the district to provide student transportation; or
5. By court order.

Gov't Code 411.097(d)(1) [See CJA, DBAA, and DHB]

Sensitive Crime
Scene Image

A sensitive crime scene image in the custody of a district is confidential and excepted from public disclosure, regardless of the date that the image was taken or recorded. A district may not permit a person to view or copy the image unless the person is one of the individuals specified by Government Code 552.1085(d) and the district is not otherwise asserting an exception to disclosure under another provision of the Public Information Act or another law. *Gov't Code 552.1085*

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Computer Security

*Computer
Networks*

Information is excepted from public disclosure if it is information that relates to computer network security, to network security information that is restricted under Government Code 2059.055, or to the design, operation, or defense of a computer network.

The following information is confidential:

1. A computer network vulnerability report;
2. Any other assessment of the extent to which data processing operations, a computer, a computer program, network, system, or system interface, or software of a district or of a contractor of a district is vulnerable to unauthorized access or harm, including an assessment of the extent to which a district's or contractor's electronically stored information containing sensitive or critical information is vulnerable to alteration, damage, erasure, or inappropriate use;
3. A photocopy or other copy of an identification badge issued to an official or employee of a district; and
4. Information directly arising from a governmental body's routine efforts to prevent, detect, investigate, or mitigate a computer security incident, including information contained in or derived from an information security log. This does not affect the notification requirements related to a breach of system security as defined by Business and Commerce Code 521.053. [See CQB]

A district may disclose the information to a bidder if the district determines that providing the information is necessary for the bidder to provide an accurate bid. Such a disclosure is not a voluntary disclosure for purposes of Government Code 552.007 [see Voluntary Disclosure, below].

Gov't Code 552.139

*Cybersecurity
Information*

A cyber threat indicator or defensive measure shared with the federal government under Title 6, United States Code, shall be:

1. Exempt from disclosure under federal freedom of information law and any state or local provision of public information law requiring disclosure of information or records; and
2. Withheld, without discretion, from the public under federal freedom of information law and any state or local provision of public information law requiring disclosure of information or records.

6 U.S.C. 1504(d)(4)(B) [See CQB]

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*Texas VIRT
Information*

Information written, produced, collected, assembled, or maintained by a participating district or a volunteer from the district in the implementation of Government Code Chapter 2054, Subchapter N-2 (Texas Volunteer Incident Response Team) is confidential and not subject to disclosure under the Public Information Act if the information:

1. Contains the contact information for a volunteer;
2. Identifies or provides a means of identifying a person who may, as a result of disclosure of the information, become a victim of a cybersecurity event;
3. Consists of a participating district's cybersecurity plans or cybersecurity-related practices; or
4. Is obtained from a participating district or from a participating district's computer system in the course of providing assistance under Subchapter N-2.

Gov't Code 2054.52010

Military Discharge
Records

A military veteran's Department of Defense Form DD-214 or other military discharge record that first comes into the possession of a district on or after September 1, 2003, is confidential for the 75 years following the date it comes into the possession of a district. During that period, the district may only permit inspection, copying, or disclosure of the information contained in the record only in accordance with Government Code 552.140 or a court order. The district is authorized to withhold a Form DD-214 or other military discharge record that is first recorded with or that otherwise first comes into the possession of the district on or after September 1, 2003, under this provision without the necessity of requesting an attorney general decision. *Gov't Code 552.140(a), (b); Atty. Gen. ORD 684 (2009)*

Limited Use

A district that obtains this information from another governmental body shall limit the district's use and disclosure of the information to the purpose for which the information was obtained. *Gov't Code 552.140(e)*

Firefighter or EMS
Work Schedules

A work schedule or a time sheet of a firefighter or volunteer firefighter or emergency medical services personnel as defined by Health and Safety Code 773.003 is confidential and excepted from public disclosure. *Gov't Code 552.159*

Out-of-State Health-
Care Provider
Information

Information obtained by a district that was provided by an out-of-state health-care provider in connection with a quality management, peer review, or best practices program that the out-of-state

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health-care provider pays for is confidential and excepted from public disclosure. *Gov't Code 552.162*

Applicant for
Disaster Recovery
Funds

The following information maintained by a district is confidential:

1. The name, social security number, house number, street name, and telephone number of an individual or household that applies for state or federal disaster recovery funds;
2. The name, tax identification number, address, and telephone number of a business entity or an owner of a business entity that applies for state or federal disaster recovery funds; and
3. Any other information the disclosure of which would identify or tend to identify a person or household that applies for state or federal disaster recovery funds.

The street name and census block group of and the amount of disaster recovery funds awarded to a person or household are not confidential after the date on which disaster recovery funds are awarded to the person or household.

Gov't Code 552.160(b), (c)

Threat of Physical
Harm

Information in the custody of a district that relates to an employee or officer of the district is excepted from public disclosure if, under the specific circumstances pertaining to the employee or officer, disclosure of the information would subject the employee or officer to a substantial threat of physical harm. *Gov't Code 552.152*

**Exceptions to
Disclosure**

Voluntary
Disclosure

The Public Information Act does not prohibit a district or its officer for public information from voluntarily making part or all of its information available to the public, unless the disclosure is expressly prohibited by law or the information is confidential under law. Information voluntarily made available as allowed under this provision must be made available to any person and cannot be withheld from further disclosure. *Gov't Code 552.007; Atty. Gen. ORD 518 (1989)*

Right of Access
After 75 Years

Except for social security numbers, the confidentiality provisions of the Public Information Act, or as otherwise provided by law, information that is not confidential but is excepted from required disclosure under Government Code Chapter 552, Subchapter C, is public information and is available to the public on or after the 75th anniversary of the date the information was originally created or received by the district. This paragraph does not limit the authority of a district to establish retention periods for records under applicable law. *Gov't Code 552.0215*

Information Relating
to Litigation

Information is excepted from public disclosure if it is information relating to litigation of a civil or criminal nature to which a district is, or

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may be, a party or to which an officer or employee of the district, as a consequence of the office or employment, is or may be a party, but only if the litigation is pending or reasonably anticipated on the date the district's public information officer receives the request. *Gov't Code 552.103(a), (c)*

Information Related
to Competition or
Bidding

Information is excepted from public disclosure if the district demonstrates that the release of the information would harm its interests by providing an advantage to a competitor or bidder in a particular ongoing competitive situation or in a particular competitive situation where the district establishes the situation at issue is set to reoccur or there is a specific and demonstrable intent to enter into the competitive situation again in the future. Required disclosure under Government Code 552.022 does not apply to information that is excepted from required disclosure under this provision.

*Parades,
Concerts, and
Entertainment
Events*

Information relating to the receipt or expenditure of public or other funds by a district for a parade, concert, or other entertainment event paid for in whole or part with public funds is not excepted from public disclosure. A person, including a district, may not include a provision in a contract related to an event that prohibits or would otherwise prevent the disclosure of this information. A contract provision that violates Government Code 552.104(c) is void.

Gov't Code 552.104

Certain Information
on Real or Personal
Property

Information is excepted from public disclosure if it is information relating to the location of real or personal property for a public purpose prior to public announcement of the project, or information relating to appraisals or purchase price of real or personal property for a public purpose prior to the formal award of contracts for the property. *Gov't Code 552.105*

Drafts Involving
Legislation

A draft or working paper involved in the preparation of proposed legislation is excepted from public disclosure. *Gov't Code 552.106*

Certain Legal
Information

Information is excepted from public disclosure if it is not privileged information but information that an attorney of a district is prohibited from disclosing because of a duty to the board under the Texas Rules of Evidence or the Texas Disciplinary Rules of Professional Conduct, or information that a court order has prohibited from disclosure. *Gov't Code 552.107*

Certain Law
Enforcement
Information

Information (other than basic information about an arrested person, an arrest, or a crime) held by a law enforcement agency or prosecutor that deals with the detection, investigation, or prosecution of crime is excepted from public disclosure if:

1. Release of the information would interfere with the detection, investigation, or prosecution of crime; or

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2. It is information that deals with the detection, investigation, or prosecution of crime only in relation to an investigation that did not result in conviction or deferred adjudication.

An internal record or notation of a law enforcement agency that is maintained for internal use in matters relating to law enforcement or prosecution is excepted from public disclosure if:

1. Release of the internal record or notation would interfere with law enforcement or prosecution; or
2. The internal record or notation relates to law enforcement only in relation to an investigation that did not result in conviction or deferred adjudication.

Gov't Code 552.108; *Houston Chronicle Publ'g Co. v. City of Houston*, 536 S.W.2d 559 (Tex. 1976)

Private
Correspondence of
Elected Official

Private correspondence and communications of an elected office holder relating to matters the disclosure of which would constitute an invasion of privacy are excepted from public disclosure. Gov't Code 552.109; *Industrial Foundation of the South v. Texas Indus. Acc. Bd.*, 540 S.W.2d 668 (Tex. 1976)

Trade Secrets

Except as provided by Government Code 552.0222 (disclosure of contracting information), information is excepted from public disclosure if it is demonstrated based on specific factual evidence that the information is a trade secret, as defined by Government Code 552.110(a). *Gov't Code 552.110(b)*

Certain Commercial
and Financial
Information

Except as provided by Government Code 552.0222 (disclosure of contracting information), commercial or financial information for which it is demonstrated based on specific factual evidence that disclosure would cause substantial competitive harm to the person from whom the information was obtained is excepted from public disclosure. *Gov't Code 552.110(c)*

Proprietary
Information

Except as provided by Government Code 552.0222 (disclosure of contracting information), information submitted to a district by a vendor, contractor, potential vendor, or potential contractor in response to a request for a bid, proposal, or qualification is excepted from public disclosure if the vendor, contractor, potential vendor, or potential contractor demonstrates based on specific factual evidence that disclosure of the information would be proprietary as specified under Government Code 552.1101(a).

This exception to disclosure may be asserted only by a vendor, contractor, potential vendor, or potential contractor in the manner described by Government Code 552.305(b) for the purpose of pro-

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protecting the interests of the vendor, contractor, potential vendor, or potential contractor.

A district must decline to release this information as provided by Government Code 552.305(a) to the extent necessary to allow a vendor, contractor, potential vendor, or potential contractor to assert the exception to disclosure provided by Government Code 552.1101(a) (proprietary information).

Gov't Code 552.1101 [See GBAA for additional procedures related to information involving proprietary interests of a vendor, contractor, or potential vendor or contractor.]

Proprietary Records and Trade Secrets in Certain Partnerships	Information in the custody of a district that relates to a proposal for a qualifying project authorized under Government Code Chapter 2267 is excepted from public disclosure if the information and records meet the criteria outlined at Government Code 552.153(b). The district is not authorized to withhold information as outlined by Government Code 552.153(c). <i>Gov't Code 552.153</i> [See CDH]
Certain Memoranda	An interagency or intra-agency memorandum or letter that would not be available by law to a party in litigation with a district is excepted from public disclosure. <i>Gov't Code 552.111; City of Garland v. Dallas Morning News, 22 S.W.3d 351 (Tex. 2000)</i>
Audit Working Paper	An audit working paper of an auditor of a school district, including any audit relating to the criminal history background check of a public school employee, is excepted from public disclosure. If information in an audit working paper is also maintained in another record, that other record is not excepted. "Audit" means an audit authorized or required by a statute of Texas or the United States or a resolution or other action of a board of trustees of a school district, including an audit by the district relating to the criminal history background check of a public school employee, and includes an investigation. "Audit working paper" includes all information, documentary or otherwise, prepared or maintained in conducting an audit or preparing an audit report, including intra-agency and interagency communications and drafts of the audit report or portions of those drafts. <i>Gov't Code 552.116</i>

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Personal
Information of
Certain Individuals

*Board Members
and Others*

Option to
Restrict Access

Information that relates to the home address, home telephone number, emergency contact information, date of birth, or social security number of an individual to whom Government Code 552.1175(a) applies (including a current or honorably retired peace officer, commissioned security officer, elected public officer, members of the military, or a firefighter or volunteer firefighter), or that reveals whether the individual has family members is confidential and may not be disclosed to the public if the individual to whom the information relates chooses to restrict public access to the information by notifying the district on a form provided by the district with evidence of the individual's status. This choice remains valid until rescinded in writing by the individual.

Redaction and
Notice to
Requestor

In accordance with Government Code 552.1175(f), a district may redact information that must be withheld under this provision from any information the district discloses under the Public Information Act without the necessity of requesting a decision from the attorney general. If a district redacts information under this provision, the district shall provide the information required by Government Code 552.1175(h) to the requestor on a form prescribed by the attorney general. The requestor is entitled to seek a decision from the attorney general about the matter.

Gov't Code 552.1175

*Board Member
and Employee
Personnel
Information*

Information is excepted from public disclosure if it is information that relates to the home address, home telephone number, emergency contact information, or social security number of the persons listed at Government Code 552.117(a) or that reveals whether the person has family members. Government Code 552.117(a) includes the following:

1. A current or former district employee or board member, except as provided by Government Code 552.024, below;
2. Certain peace officers, security officers, law enforcement personnel, and first responders; and
3. An elected public officer, regardless of whether the officer complies with Government Code 552.024, below, or .1175, above.

Gov't Code 552.117

Choice To Allow
Access

Each current or former employee or board member of a district shall choose whether to allow public access to information in the custody of the district that relates to the person's home address, home telephone number, emergency contact information, or social security number, or that reveals whether the person has family members.

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Each current or former employee and board member shall state that person's choice to the main personnel officer of the district in a signed writing not later than the 14th day after the date on which the employee begins employment with the district, the board member is elected or appointed, or the former employee or official ends service with the district.

If the current or former employee or board member fails to state the person's choice within the period established by this provision, the information is subject to public access.

A current or former employee or board member who wishes to close or open public access to the information may request in writing that the main personnel officer of the district close or open access.

Exercising the option to close public access to protect personal information does not apply to a public information request made before the option was exercised.

Gov't Code 552.024; Atty. Gen. ORD 530 (1989)

Redaction and
Notice to
Requestors

If the current or former employee or board member chooses not to allow public access to the information, the district may redact the information from any information the district discloses without the necessity of requesting a decision from the attorney general. *Gov't Code 552.024(c)*

A district that redacts or withholds information under this provision shall provide the information required by Government Code 552.024(c-2) to the requestor on a form prescribed by the attorney general. The requestor is entitled to seek a decision from the attorney general about the matter. *Gov't Code 552.024(c-1), (c-2)*

Photograph of
Peace Officer

A photograph that depicts a peace officer, the release of which would endanger the life or physical safety of the officer, is excepted from public disclosure unless:

1. The officer is under indictment or charged with an offense by information;
2. The officer is a party in a fire or police civil service hearing or a case in arbitration; or
3. The photograph is introduced as evidence in a judicial proceeding.

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If a photograph is exempt from public disclosure as described above, it may be made public only if the officer gives written consent.

Gov't Code 552.119

Testing Items

A test item developed by an educational institution that is funded wholly or in part by state revenue or by a district is excepted from public disclosure. *Gov't Code 552.122*

Certain Library
Records

A record of a library or library system, supported in whole or in part by public funds, that identifies or serves to identify a person who requested, obtained, or used a library material or service is excepted from public disclosure, unless the record is disclosed:

1. Because the library determines that disclosure is reasonably necessary for the operation of the library and the records are not confidential under other state or federal law;
2. To a person with a special right of access under Government Code 552.023; or
3. To a law enforcement agency or prosecutor under a court order or a subpoena obtained in compliance with this provision.

Gov't Code 552.124

Superintendent
Applicants

The name of an applicant for superintendent of a district is excepted from public disclosure, except that the board must give public notice of the name or names of the finalists being considered for that position at least 21 days before the date of the meeting at which final action or a vote is to be taken on the applicant's employment. *Gov't Code 552.126*

Certain Motor
Vehicle and
Personal
Identification
Information

Information is excepted from public disclosure if the information relates to:

1. A motor vehicle operator's or driver's license or permit issued by an agency of this state or another state or country;
2. A motor vehicle title or registration issued by an agency of this state or another state or country; or
3. A personal identification document issued by an agency of this state, another state or country, or a local agency authorized to issue an identification document.

The motor vehicle record information described above may be released only if, and in the manner, authorized by Transportation Code Chapter 730.

Subject to Transportation Code Chapter 730 (the Motor Vehicle Records Disclosure Act), a district may redact motor vehicle or driver license information (including a Texas driver's license number, a copy of a Texas driver's license, a Texas license plate number, the portion of a photograph that reveals a Texas license plate number, and the portion of any video depicting a discernible Texas license plate number) under this provision from any information the district discloses without the necessity of requesting a decision from the attorney general. The district shall provide the information specified at Government Code 552.130(e) to the requestor on a form prescribed by the attorney general. The requestor is entitled to seek a decision from the attorney general about the matter.

Gov't Code 552.130; Atty. Gen. ORD 684 (2009)

Economic
Development
Negotiations

Information is excepted from public disclosure if the information relates to economic development negotiations involving a board and a business prospect that the board seeks to have locate, stay, or expand in or near a district and the information relates to:

1. A trade secret of the business prospect; or
2. Commercial or financial information for which it is demonstrated based on specific factual evidence that disclosure would cause substantial competitive harm to the person from whom the information was obtained.

Gov't Code 552.131(a)

Unless and until an agreement is made with the business prospect, information about a financial or other incentive being offered to a business prospect by a board or by another person is excepted from public disclosure.

After an agreement is made, the exception no longer applies to information about a financial or other incentive being offered to the business prospect:

1. By the board; or
2. By another person, if the financial or other incentive may directly or indirectly result in the expenditure of public funds by a district or a reduction in revenue received by the district from any source.

Gov't Code 552.131(b), (c)

Social Security
Numbers of Any
Living Person

Except for the social security number of a district employee in the custody of the district, the social security number of a living person is excepted from public disclosure, but is not confidential under the Public Information Act. A district may redact the social security

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	number of a living person from any information the district discloses to the public without the necessity of requesting a decision from the attorney general. <i>Gov't Code 552.147(a), (c)</i>
Exclusions from Public Information	
Protected Health Information	An individual's protected health information as defined by Health and Safety Code 181.006 is not public information and is not subject to disclosure under the Public Information Act. <i>Gov't Code 552.002(d)</i>
Subpoena or Discovery Request	A subpoena duces tecum or a request for discovery that is issued in compliance with a statute or a rule of civil or criminal procedure is not considered to be a request for information under the Public Information Act. The Public Information Act does not affect the scope of civil discovery under the Texas Rules of Civil Procedure, and exceptions from disclosure under the PIA do not create new privileges from discovery. <i>Gov't Code 552.005, .0055</i>
No Right of Access	
Commercially Available Publications	A district is not required under the Public Information Act to allow the inspection of or to provide a copy of information in a commercial book or publication purchased or acquired by the district for research purposes, if the book or publication is commercially available to the public. Although information in a book or publication may be made available to the public as resource material, such as a library book, a district is not required to make a copy of the information in response to a request for public information.
<i>Exception</i>	The district shall allow the inspection of information in a book or publication that is made part of, incorporated into, or referred to in a rule or policy of the board or district. <i>Gov't Code 552.027</i>
Requests from Incarcerated Individuals	A district is not required to accept or comply with a request for information from an individual who is imprisoned or confined in a correctional facility or an agent of that individual, other than the individual's attorney when the attorney is requesting information that is subject to disclosure under the Public Information Act. This provision does not prohibit a district from disclosing to an incarcerated individual or the individual's agent information held by the district that pertains to the individual. <i>Gov't Code 552.028</i>
Retirement Eligibility Records	Records, including any identifying information, of individual members, annuitants, retirees, beneficiaries, alternate payees, program participants, or persons eligible for benefits from TRS or another retirement system that are in the custody of the system or in the custody of an administering firm, a carrier, the district, or another governmental body, acting in cooperation with or on behalf of the retirement system are confidential and not subject to public disclosure.

An administering firm, carrier, or the district acting in cooperation with or on behalf of the retirement system is not required to accept or comply with a request for a record or information about a record or to seek an opinion from the attorney general.

For this provision, "participant" means a member, former member, retiree, annuitant, beneficiary, or alternate payee of the retirement system, or an employee or contractor of an employer covered by the retirement system for whom records were received by the retirement system for the purpose of administering the terms of the plan, including for audit or investigative purposes.

Gov't Code 552.0038(c), (h), 825.507(g)

¹ Office of the Attorney General and the Public Information Act:
<https://www.texasattorneygeneral.gov/open-government/office-attorney-general-and-public-information-act>

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Note: For forms prescribed by the attorney general, see the [Attorney General's Public Information website](#).¹

**Officer for Public
Information and
Required Sign**

Officer and Agents

The superintendent of a district is the officer for public information. Each department head is an agent of the officer for public information for purposes of complying with Government Code Chapter 552 (Public Information Act [PIA]).

Duties

The officer is responsible for the release of public information as required by the Public Information Act. Subject to penalties provided by the Public Information Act, the officer for public information shall:

1. Make public information available for public inspection and copying;
2. Carefully protect public information from deterioration, alteration, mutilation, loss, or unlawful removal;
3. Repair, renovate, or rebind public information when necessary to maintain it properly; and
4. Make reasonable efforts to obtain public information from a temporary custodian if:
 - a. The information has been requested from the district;
 - b. The officer is aware of facts sufficient to warrant a reasonable belief that the temporary custodian has possession, custody, or control of the information;
 - c. The officer is unable to comply with the duties imposed by the Public Information Act without obtaining the information from the temporary custodian; and
 - d. The temporary custodian has not provided the information to the officer or the officer's agent.

The officer is not responsible for the use made of the information by the requestor or the release of the information after it is removed from a record as a result of an update, correction, or change of status of the person to whom the information pertains.

Gov't Code 552.201(a)–.204; Keever v. Finlan, 988 S.W.2d 300 (Tex. App.–Dallas 1999, pet. dismiss'd) (a district's chief administrative officer is the superintendent)

Training

This provision applies to an elected or appointed board member and the officer for public information.

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Each person shall complete a course of training of not less than one and not more than two hours regarding the responsibilities of the district and its board members and employees under the Public Information Act not later than the 90th day after the date:

1. The board member takes the oath of office; or
2. The officer for public information assumes duties as officer for public information.

A public information coordinator who is primarily responsible for administering the responsibilities of the board under the Public Information Act and designated for board members to satisfy the training requirement of this provision shall complete the training course regarding the responsibilities of the board and district employees under the PIA not later than the 90th day after the date the coordinator assumes the person's duties as coordinator. [See BBD, CPC(LOCAL)]

Designation of a public information coordinator does not relieve a board member from the duty to comply with any other requirement of the Public Information Act that applies to the board member. A district shall maintain and make available for public inspection the record of its board members' or, if applicable, the public information coordinator's completion of the training.

Gov't Code 552.012(a)–(c), (e)

PIA Sign

The officer for public information shall prominently display a sign (PIA sign) in the form prescribed by the attorney general that contains basic information about the rights of a requestor, the responsibilities of a district, and the procedures for inspecting or obtaining a copy of public information under the Public Information Act. The officer shall display the sign at one or more places in the district's administrative offices where it is plainly visible to:

1. Members of the public who request public information in person; and
2. Employees of the district whose duties include receiving or responding to public information requests.

Gov't Code 552.205(a)

Requests for Public Information

Method of
Requesting Public
Information

A person may make a written request for public information only by delivering the request by one of the following methods to the officer for public information or a person designated by that officer:

1. United States mail;
2. Electronic mail;

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3. Hand delivery; or
4. Any other appropriate method approved by the district, including facsimile transmission and electronic submission through the district's website.

A district is considered to have approved another method only if the district includes a statement on the PIA sign or the district's website that states a request for public information may be made by that method.

*Designated
Addresses to
Receive
Requests*

A district may designate one mailing address and one electronic mail address for receiving written requests for public information and shall provide the designated mailing address and electronic mailing address to any person on request.

A district that posts a designated mailing address or electronic mail address on the district's website or that prints those addresses on the PIA sign is not required to respond to a written request for public information unless the request is received:

1. At one of those addresses;
2. By hand delivery; or
3. By a method described above that has been approved by the district.

Gov't Code 552.234(c), (d)

*Optional Request
Form*

The attorney general shall create a public information request form that provides a requestor the option of excluding from a request information that the district determines is:

1. Confidential; or
2. Subject to an exception to disclosure that the district would assert if the information were subject to the request.

A district that allows requestors to use the attorney general's form and maintains a website shall post the form on its website.

Gov't Code 552.235

**District Response to
Requests**

Uniform Treatment

The officer for public information or the officer's agent shall treat all requests for information uniformly without regard to the position or occupation of the requestor, the person on whose behalf the request is made, or the status of the individual as a member of the media. *Gov't Code 552.223*

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Inquiries by District	The officer for public information and the officer's agent may not make an inquiry of a requestor except to establish proper identification or except as provided below.
<i>Requests to Clarify or Narrow</i>	If what information is requested is unclear to the district, the district may ask the requestor to clarify the request. If a large amount of information has been requested, the district may discuss with the requestor how the scope of the request might be narrowed, but the district may not inquire into the purpose for which the information will be used.
<i>Additional Information for Vehicle Records</i>	If the information requested relates to a motor vehicle record, the officer for public information or agent may require the requestor to provide additional identifying information sufficient for the officer or agent to determine whether the requestor is eligible to receive the information under Transportation Code Chapter 730. In this provision, "motor vehicle record" has the meaning assigned that term by Transportation Code 730.003. <i>Gov't Code 552.222(a)–(c)</i>
Statement of Consequences	A written request for clarification or discussion or for additional information, as described above, must include a statement as to the consequences of the failure by the requestor to timely respond to the request for clarification, discussion, or additional information. <i>Gov't Code 552.222(e)</i>
<i>Requestor's Failure to Respond</i>	If by the 61st day after the date the district sends a written request for clarification or discussion or for additional information, as described above, the district, officer for public information, or agent does not receive a written response from the requestor, the underlying request for public information is considered to have been withdrawn by the requestor.
Exception to Automatic Withdrawal	Except when the requestor's information request was sent by electronic mail, described below, if the requestor's information request included the requestor's physical or mailing address, the request may not be considered to have been withdrawn unless the district or officer for public information or agent sends the request for clarification or discussion or for additional information, as described above, to that address by certified mail. If the requestor's information request was sent by electronic mail, the request may be considered to have been withdrawn if: 1. The district, officer for public information, or agent sends the request for clarification or discussion or the written request for additional information by electronic mail to the same electronic mail address from which the original request was sent

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or to another electronic mail address provided by the requestor; and

2. The district, officer for public information, or agent does not receive from the requestor a written response or response by electronic mail within the period described by Government Code 552.222(d).

Gov't Code 552.222(d), (f)–(g)

Time for Production
Promptly

An officer for public information shall promptly produce public information for inspection, duplication, or both, on application by any person to the officer. "Promptly" means as soon as possible under the circumstances, that is, within a reasonable time, without delay. A district may not automatically withhold for ten business days public information not excepted from disclosure. *Gov't Code 552.221(a); Atty. Gen. ORD 664 (2000)*

Certifications of Availability

If an officer for public information cannot produce the public information for inspection or duplication within ten business days after the date the information is requested, the officer shall certify that fact in writing to the requestor and set a date and hour within a reasonable time when the information will be available for inspection or duplication.

If the requested information is unavailable at the time of the request to examine because it is in storage or active use, an officer for public information shall certify this fact in writing to the requestor and set a date and hour within a reasonable time when the information will be available for inspection or duplication.

Gov't Code 552.221(c), (d)

Administrative Offices Closed

Unless the district has initiated a temporary suspension of the Public Information Act during a catastrophe [see below], if a district closes its physical offices, but requires staff to work, including remotely, then the district shall make a good faith effort to continue responding to applications for public information, to the extent staff have access to public information responsive to an application while its administrative offices are closed.

Failure to respond to requests may constitute a refusal to request an attorney general's decision or a refusal to supply public information or information that the attorney general has determined is public information that is not excepted from disclosure.

Gov't Code 552.2211

Methods of
Production

An officer for public information complies with the requirement to promptly produce public information by:

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1. Providing the information for inspection or duplication in the offices of a district. The Public Information Act does not authorize a requestor to remove an original copy of a public record from the office of a district;
2. Sending copies of the information by first class United States mail, if the requestor requests that copies be provided and pays the postage and any other applicable charges that the requestor has accrued under Government Code Chapter 552, Subchapter F [see Authorized Costs and Charges, below]; or
3. Referring a requestor to an exact internet location or uniform resource locator (URL) address on a website maintained by the district and accessible to the public if the requested information is identifiable and readily available on that website. If the person requesting the information prefers a manner other than access through the URL, the district must supply the information in the manner described above at items 1 and 2.

If the officer for public information provides by email an internet location or URL address as permitted by item 3, above, the email must contain a statement in a conspicuous font clearly indicating that the requestor may nonetheless access the requested information by inspection or duplication or by receipt through United States mail, as described above at items 1 and 2.

Gov't Code 552.221(b)–(b-2), .226

Inspection and
Duplication
Procedures

A district may promulgate reasonable rules of procedure under which public information may be inspected and copied efficiently, safely, and without delay. These rules may not be inconsistent with any provision of the Public Information Act. *Gov't Code 552.230*

The officer for public information or agent shall give the requestor all reasonable comfort and facility for the full exercise of the right granted by the Public Information Act. *Gov't Code 552.224*

*Time For District
to Provide Copies*

It shall be a policy of a district to provide a suitable copy of public information within a reasonable time after the date on which the copy is requested. *Gov't Code 552.228(a)*

*Time for
Requestor to
Appear and
Complete
Inspection*

A request is considered to have been withdrawn if the requestor fails to inspect or duplicate the public information in district offices on or before the 60th day after the date the information is made available or fails to pay the postage and any other applicable charges accrued under Government Code Chapter 552, Subchapter F on or before the 60th day after the date the requestor is informed of the charges.

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A requestor must complete the examination of the information not later than the tenth business day after the date the custodian of the information makes it available. If the requestor does not complete the examination within ten business days and does not file a request for additional time under Government Code 552.225(b) (described below), the requestor is considered to have withdrawn the request.

The officer for public information shall extend the initial examination period by an additional ten business days if, within the initial period, the requestor files with the officer a written request for additional time. The officer shall extend an additional examination period by another ten business days if, within the first additional period, the requestor files with the officer a written request for more additional time.

The time during which a person may examine information may be interrupted by the officer if the information is needed for use by the district. The period of interruption is not considered to be a part of the time during which the person may examine the information.

Gov't Code 552.221(e), .225

Electronic Data

If public information exists in an electronic or magnetic medium, the requestor may request a copy in an electronic medium, such as on diskette or on magnetic tape. A district shall provide a copy in the requested medium if:

1. The district has the technological ability to produce a copy of the information in the requested medium;
2. The district is not required to purchase any software or hardware to accommodate the request; and
3. Provision of a copy of the information in the requested medium will not violate the terms of any copyright agreement between the district and a third party.

If a district is unable to comply with a request to produce a copy of information in a requested medium for any of these reasons, the district shall provide a copy in another medium that is acceptable to the requestor. A district is not required to copy information onto a diskette or other material provided by the requestor but may use district supplies.

Gov't Code 552.228(b), (c)

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Requests Requiring
Programming or
Data Manipulation

*Written
Statement
Required*

A district shall provide to a requestor a written statement, described below, if the district determines:

1. That responding to a request for information will require programming or manipulation of data; and
2. That:
 - a. Compliance with the request is not feasible or will result in substantial interference with operations; or
 - b. The information could be made available in the requested form only at a cost that covers the programming and manipulation of data.

The written statement shall include:

1. A statement that the information is not available in the requested form;
2. A description of the form in which the information is available;
3. A description of any contract or services that would be required to provide the information in the requested form;
4. A statement of the estimated cost of providing the information in the requested form, as determined in accordance with the rules established by the attorney general under Government Code 552.262; and
5. A statement of the anticipated time required to provide the information in the requested form.

*Time For
Programming or
Manipulation
Statement*

A district shall provide the written statement to the requestor within 20 days after the date the district receives the request. The district has an additional ten days to provide the statement if the district gives written notice to the requestor, within 20 days after receiving the request, that additional time is needed.

*Requestor Reply
Required*

On providing the written statement described above, the district does not have any further obligation to provide the information in the requested form or in the form in which it is available, unless within 30 days the requestor states in writing that the requestor:

1. Wants the district to provide the information in the requested form according to the cost and time parameters set out in the written statement or according to other terms to which the requestor and the district agree; or
2. Wants the information in the form in which it is available.

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If a requestor does not make a timely written statement to the district, the requestor is considered to have withdrawn the request for information.

*Processing
Procedures and
Recordkeeping*

The officer for public information shall establish policies that assure the expeditious and accurate processing of requests for information that require programming or manipulation of data. A district shall maintain a file containing all written statements issued concerning responding to requests for information that require programming or manipulation of data in a readily accessible location.

Gov't Code 552.231

Repetitious or
Redundant
Requests

A district that determines a requestor has made a request for information for which the district has previously furnished or made copies available to the requestor on payment of applicable charges must respond to the request, in relation to the information for which copies have already been furnished or made available, except that:

1. The district is not prohibited from furnishing the information or making the information available to the requestor again in accordance with the request; and
2. The district is not required to comply with these provisions in relation to information that the district simply furnishes or makes available to the requestor again in accordance with the request.

Gov't Code 552.232(a)

These provisions do not apply to information not previously furnished to a requestor or made copies available to the requestor on payment of applicable charges.

A request by the requestor for information for which copies have not previously been furnished or made available to the requestor, including information for which copies were not furnished or made available because the information was redacted from other information that was furnished or made available or because the information did not exist at the time of an earlier request shall be treated in the same manner as any other request for public information under the Public Information Act.

Gov't Code 552.232(d)

*Certification of
Previous
Production*

A district shall certify to the requestor that copies of all or part of the requested information were previously furnished or made available to the requestor. The certification must include:

1. A description of the information for which copies have been previously furnished or made available to the requestor;

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2. The date the district received the requestor's original request for that information;
3. The date the district previously furnished copies or made available copies of the information to the requestor;
4. A certification that no subsequent additions, deletions, or corrections have been made to that information; and
5. The name, title, and signature of the officer for public information or agent making the certification.

A charge may not be imposed for making and finishing this certification.

Gov't Code 552.232(b), (c)

**Withholding
Excepted
Information**

Request for
Attorney General
Decision Required

A district that receives a written request for information that it wishes to withhold from public disclosure and that it considers to be within one of the exceptions to required disclosure under Government Code Chapter 552, Subchapter C [see GBA] must ask for a decision from the attorney general about whether the information is within that exception if there has not been a previous determination about whether the information falls within one of the exceptions [see Request for Attorney General Decision Not Required, below]. A district may only request an attorney general decision if the district reasonably believes that the requested information is excepted from required disclosure. *Gov't Code 552.301(a); Atty. Gen. ORD 665 (2000)*

*Consequences of
Missed Deadlines*

If a district does not request an attorney general decision and provides the requestor with the information required by Government Code 552.301(d) and (e-1) [see Information to Requestor, below], the information requested in writing is presumed to be subject to public disclosure and must be released unless there is a compelling reason to withhold it. *Gov't Code 552.302*

*Request and
Submissions to
Attorney General*

The district must ask for the attorney general's decision and state the exceptions that apply within a reasonable time but not later than the tenth business day after the date of receiving the written request.

When a district requests an attorney general decision, it shall, within a reasonable time but not later than the 15th business day after receiving the request for information, submit to the attorney general all of the following:

1. Written comments stating the reasons why the stated exceptions apply that would allow the information to be withheld;
2. A copy of the written request for information;

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3. A signed statement as to the date on which the written request for information was received by the district or evidence sufficient to establish that date; and
4. A copy of the specific information requested, or representative samples of the information if a voluminous amount of information was requested. The district shall label the copies or representative samples to indicate which exceptions apply to which parts of the copy.

Gov't Code 552.301(b), (e)

*Information to
Requestor*

A district that requests an attorney general decision shall provide to the requestor within a reasonable time but not later than the tenth business day after the date of receiving the requestor's written request:

1. A written statement that the district wishes to withhold the requested information and has asked for a decision from the attorney general about whether the information is within an exception to public disclosure; and
2. A copy of the district's written communication to the attorney general asking for the decision. If a district's written communication to the attorney general discloses the requested information, the district shall provide a redacted copy of that written communication.

The district shall send a copy of the comments to the requestor not later than the 15th business day after the district receives the written request. If the written comments disclose or contain the substance of the information requested, the copy of the comments provided to the requestor shall be redacted.

Gov't Code 552.301(d), (e-1)

*Calculating
Timeliness*

For the purposes of Government Code Chapter 552, Subchapter G (Attorney General Decisions), if a district receives a written request by United States mail and cannot adequately establish the actual date of receipt, the request is considered to have been received by the district on the third business day after the date of the postmark on a properly addressed request. *Gov't Code 552.301(a-1)*

When Government Code Chapter 552, Subchapter G requires a request, notice, or other document to be submitted or otherwise given to the attorney general within a specified period, the requirement is met in a timely fashion if the district submits the document through the attorney general's designated electronic filing system within that period. This provision does not affect the right of a dis-

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trict to submit information to the attorney general by specified methods of mail under Government Code 552.308.

When the attorney general is required to deliver a notice, decision, or other document within a specified period, the requirement is met in a timely fashion if the attorney general electronically transmits the document within that period.

For information surrendered or returned to a district by a temporary custodian, the district is considered to receive the request for that information on the date the information is surrendered or returned to the district. [See GB]

Gov't Code 552.233(d), .309

When Government Code Chapter 552, Subchapter G requires a request, notice, or other document to be submitted or otherwise given to a person within a specified period, the requirement is met in a timely fashion if the document is sent to the person by first class United States mail or common or contract carrier properly addressed with postage or handling charges prepaid and:

1. It bears a post office cancellation mark or a receipt mark of a common or contract carrier indicating a time within that period; or
2. The person required to submit or otherwise give the document furnishes satisfactory proof that it was deposited in the mail or with a common or contract carrier within that period.

Gov't Code 552.308

*Third Party
Privacy or
Property Interests*

In a case in which information is requested under the Public Information Act and a person's privacy or property interests may be involved, including a case under Government Code 552.101 (information confidential by law), 552.110 (trade secrets), 552.1101 (proprietary information), 552.114 (student records), 552.131 (economic development information), or 552.143 (investment information), a district may decline to release the information for the purpose of requesting a decision from the attorney general.

*Third Party
Submissions*

A person whose interests may be involved as described above, or any other person, may submit in writing to the attorney general the person's reasons why the information should be withheld or released. A district may, but is not required to, submit its reasons why the information should be withheld or released. The proprietary information exception to disclosure provided by Government Code 552.1101(a) may be asserted only by a vendor, contractor, potential vendor, or potential contractor in the manner described by Government Code 552.305(b) for the purpose of protecting the in-

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terests of the vendor, contractor, potential vendor, or potential contractor.

Gov't Code 552.305(a)–(c), .1101(c)

Notice to Third
Party

If release of a person's proprietary information may be subject to exception under Government Code 552.101 (information confidential by law), 552.110 (trade secrets), 552.1101 (proprietary information), 552.113 (geological or geophysical information), 552.131 (economic development information), or 552.143 (investment information), a district that requests an attorney general decision shall make a good faith attempt to notify that person of its request. The notice must:

1. Be in writing and sent within a reasonable time not later than the tenth business day after the district receives the request for information; and
2. Include:
 - a. A copy of the written request for information, if any, received by the district; and
 - b. A statement, in the form prescribed by the attorney general, that the person is entitled to submit to the attorney general, not later than the tenth business day after the person receives the notice:
 - (1) Each reason the person has as to why the information should be withheld; and
 - (2) A letter, memorandum, or brief in support of that reason.

A person who submits a letter, memorandum, or brief to the attorney general under this provision shall send a copy of that letter, memorandum, or brief to the person who requested the information from the district. If the letter, memorandum, or brief submitted to the attorney general contains the substance of the information requested, the copy of the letter, memorandum, or brief may be a redacted copy.

Gov't Code 552.305(d), (e)

*Requests for
Contracting
Information Not
Maintained by the
District*

"Contracting information" means the following information maintained by a district or sent between a district and a vendor, contractor, potential vendor, or potential contractor:

1. Information in a voucher or contract relating to the receipt or expenditure of public funds by a district;

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2. Solicitation or bid documents relating to a contract with a district;
3. Communications sent between a district and a vendor, contractor, potential vendor, or potential contractor during the solicitation, evaluation, or negotiation of a contract;
4. Documents, including bid tabulations, showing the criteria by which a district evaluates each vendor, contractor, potential vendor, or potential contractor responding to a solicitation and, if applicable, an explanation of why the vendor or contractor was selected; and
5. Communications and other information sent between a district and a vendor or contractor related to the performance of a final contract with the district or work performed on behalf of the district.

Gov't Code 552.003(1-a)

Government Code 552.371 applies to an entity that is not a governmental body that executes a contract with a district that:

1. Has a stated expenditure of at least \$1 million in public funds for the purchase of goods or services by the district; or
2. Results in the expenditure of at least \$1 million in public funds for the purchase of goods or services by the district in a fiscal year of the district.

Government Code 552.371 applies to a written request for public information received by a district that is party to a contract described above for contracting information related to the contract that is in the custody or possession of the entity and not maintained by the district.

Gov't Code 552.371(a), (b)

District Request
to Contracting
Entity

A district that receives a written request for contracting information shall request that the entity provide the information to the district. The district must send the request in writing to the party not later than the third business day after the date the district receives the written request. *Gov't Code 552.371(c)*

Requesting
Decision About
Contracting
Information

A district's request for an attorney general's decision to determine whether contracting information not maintained by the district falls within an exception to disclosure under the Public Information Act is considered timely if made not later than the 13th business day after the date the district receives the written request described above. *Gov't Code 552.371(d)(1)*

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The statement and copy described above [see Information to Requestor] is considered timely if provided to the requestor not later than the 13th business day after the date the district receives the written request. *Gov't Code 552.371(d)(2)*

A submission and copy described above [see Request and Submissions to Attorney General] is considered timely if sent not later than the 18th business day after the date the district receives the written request. *Gov't Code 552.371(d)(3), (4)*

The presumption that information is subject to disclosure for failing to comply with Government Code 552.301 [see Request and Submissions to Attorney General, above] does not apply if a district:

1. Complies with the requirements of Government Code 552.371(c) in a good faith effort to obtain contracting information not maintained by the district;
2. Is unable to meet a deadline because the contracting entity failed to provide the information to the district not later than the 13th business day after the date the district received the written request for the information; and
3. Complies with all notice requirements not later than the eighth business day after the date the district receives the information from the contracting entity.

Gov't Code 552.371(e)

Nothing in Government Code 552.371 affects the deadlines or duties of a district related to requesting an attorney general opinion regarding contracting information the district maintains. *Gov't Code 552.371(f)*

Request for
Attorney General
Decision Not
Required

*Previous
Determinations*

Same
Information

Categories of
Previously
Determined
Information

A district must release the requested information and is prohibited from asking for a decision from the attorney general about whether information requested under this chapter is within an exception under Government Code Chapter 552, Subchapter C if the district has previously requested and received a determination from the attorney general concerning the precise information at issue in a pending request and the attorney general or a court determined that the information is public information that is not excepted by Subchapter C. *Gov't Code 552.301(f)*

A district may rely on a previous determination by the attorney general regarding a specific, clearly delineated category of information if:

1. The previous decision is applicable to a school district;

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2. The previous decision concludes that the category of information is or is not excepted from public disclosure;
3. The elements of law, fact, and circumstances are met to support the previous decision's conclusion that the requested records and information at issue are or are not excepted from public disclosure; and
4. The previous decision explicitly provides that the governmental body or bodies, such as the district, to which the decision applies may withhold the information without the necessity of seeking a decision from the attorney general.

Atty. Gen. ORD 673 (2001)

A district that relies on a previous determination to withhold information from disclosure should notify the requestor in writing of the decision or ruling upon which it is relying. *Atty. Gen. ORD 684 (2009)*

When Request
Is Allowed for
Previous
Determination

A district may ask for another decision from the attorney general concerning the precise information that was at issue in a prior decision made by the attorney general if:

1. A suit challenging the prior decision was timely filed against the attorney general in accordance with the Public Information Act concerning the precise information at issue;
2. The attorney general determines that the requestor has voluntarily withdrawn the request for the information in writing or has abandoned the request; and
3. The parties agree to dismiss the lawsuit.

Gov't Code 552.301(g)

Note: For rules regarding the attorney general's review of redactions and electronic submissions to the attorney general, see 1 Administrative Code Chapter 63. For complete cost rules issued by the attorney general, see 1 Administrative Code Chapter 70.

**Authorized Costs
and Charges**

Attorney General's
Cost Rules

A district shall use the attorney general's rules to determine the charges for providing copies of public information and to determine the charge, deposit, or bond required for making public information that exists in a paper record available for inspection, except to the extent that other law provides for charges for specific kinds of public information. The charges for providing copies of public information may not be excessive and may not exceed the actual cost of

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producing the information or for making public information that exists in a paper record available for inspection.

A district may determine its own charges for providing copies of public information and its own charge, deposit, or bond for making public information that exists in a paper record available for inspection. However, a district may not charge an amount that is greater than 25 percent more than the amount established by the attorney general, unless the district requests an exemption.

Gov't Code 552.262(a); 1 TAC 70.1(b), .3, .10.

Exemption

A district may request that it be exempt from part or all of the rules adopted by the attorney general for determining charges. The request must be made in writing to the attorney general and must state the reason for the exemption. If a district receives notice from the attorney general that an exemption has been granted, the district may amend its charges according to the attorney general's determination. *Gov't Code 552.262(c)*

Multiple Requests

All requests received in one calendar day from an individual may be treated as a single request for purposes of calculating costs. A district may not combine multiple requests from separate individuals who submit requests on behalf of an organization. *Gov't Code 552.261(e)*

Charges for
Producing Copies

The charge for providing a copy of public information shall be an amount that reasonably includes all costs related to reproducing the information, including costs of materials, labor, and overhead.

50 Pages or Less

If a request is for 50 or fewer pages of paper records, the charge for providing the copy of the information may not include costs of materials, labor, or overhead, but shall be limited to the charge for each page of the paper record that is photocopied, unless the pages to be photocopied are located in two or more separate buildings that are not physically connected with each other or a remote storage facility. A connection of two buildings by a covered or open sidewalk, an elevated or underground passageway, or a similar facility is insufficient to cause the buildings to be considered separate buildings.

*Statement of
Labor Costs*

If the charge for providing a copy of public information includes costs of labor, the requestor may require the officer for public information or agent to provide the requestor with a written statement as to the amount of time that was required to produce and provide the copy. The statement must be signed by the officer or agent, and the officer or agent's name must be typed or legibly printed below the signature. A charge may not be imposed for providing the written statement to the requestor.

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*Accrual of
Charges*

Charges for providing a copy of public information are considered to accrue at the time the district advises the requestor that the copy is available on payment of the applicable charges.

Gov't Code 552.261(a)–(d)

*Deposit or Bond
for Copies*

The officer for public information or agent may require a deposit or bond for payment of anticipated costs for the preparation of a copy of public information if:

1. The officer or agent has provided the requestor with the written itemized statement required by Government Code 552.2615 (itemized estimate of charges, below); and
2. The charge for providing the copy is estimated by the district to exceed \$100, if the district has more than 15 full-time employees, or \$50, if the district has fewer than 16 full-time employees.

The officer or agent may not require a deposit or bond as a down payment for copies of public information that the requestor may request in the future.

Gov't Code 552.263(a), (b)

*Effect on
Timelines*

For purposes of Government Code Chapter 552, Subchapters F (Charges for Providing Copies of Public Information) and G (Attorney General Decisions), a request for a copy of public information is considered to have been received by the district on the date the district receives the deposit or bond for payment of anticipated costs or unpaid amounts if the officer for public information or agent requires a deposit or bond.

A requestor who fails to make such a deposit or post such a bond for payment of anticipated costs for the preparation of copies before the tenth business day after the date the deposit or bond is required is considered to have withdrawn the request for the copy of public information that precipitated the requirement of the deposit or bond.

Gov't Code 552.263(e), (f)

*Modified
Request*

If a requestor modifies a request in response to the requirement of a deposit or bond, the modified request is considered a separate request and is considered received on the date the district receives the written modified request. *Gov't Code 552.263(e-1)*

Unpaid Amounts

The officer for public information or agent may require a deposit or bond for payment of unpaid amounts the requestor owes a district in relation to previous public information requests before preparing a copy of public information in response to a new request, if those

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unpaid amounts exceed \$100. The officer for public information or agent may not seek payment of those unpaid amounts through any other means.

*Documentation of
Unpaid Amounts*

A district must fully document the existence and amount of those unpaid amounts or the amount of any anticipated costs before requiring a deposit or bond. The documentation is subject to required public disclosure.

Gov't Code 552.263(c), (d)

Pre-Payments

A district that receives a request from a requestor to produce public information for inspection or publication or to produce copies of public information in response to a requestor who, within the preceding 180 days, has accepted but failed to pay written itemized statements of estimated charges from the district as provided under Government Code 552.261(b) (statement of labor costs, above) may require the requestor to pay the estimated charges for the request before the request is fulfilled. *Gov't Code 552.2661*

Waivers

A district shall provide a copy of public information without charge or at a reduced charge if the district determines that waiver or reduction of the charge is in the public interest because providing the information primarily benefits the general public.

If the cost to a district of processing the collection of a charge for providing a copy of public information will exceed the amount of the charge, the district may waive the charge.

Gov't Code 552.267

*District
Publications*

Government Code Chapter 552, Subchapter F (charges for providing copies of public information) does not apply to a publication that is compiled and printed by or for a district for public dissemination. If the cost of the publication is not determined by state law, a district may determine the charge for providing the publication. This provision does not prohibit the district from providing the publication free of charge if state law does not require that a certain charge be made. *Gov't Code 552.270*

*Copies for
Parents*

A district may charge a reasonable fee in accordance with the above requirements for copies of materials provided to parents pursuant to Education Code Chapter 26. *Education Code 26.012*

Charges for
Inspection Without
Copies

If the requestor does not request a copy of public information, a district may not impose a charge for making available for inspection any public information that exists in a paper record, except as set forth below.

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*Copy of Edited
Page*

If a page contains confidential information that must be edited from the record before the information can be made available for inspection, the district may charge for the cost of making a photocopy of the page from which the confidential information must be edited. No charge other than the cost of the photocopy may be imposed.

*Payment,
Deposit, or Bond
for Inspections*

The officer for public information or agent may require a requestor to pay, or to make a deposit or post a bond for the payment of, anticipated personnel costs for making available for inspection public information that exists in paper records if:

1. The information specifically requested by the requestor is older than five years or completely fills, or when assembled will completely fill, six or more archival boxes; and
2. The officer for public information or agent estimates that more than five hours will be required to make the information available for inspection.

Gov't Code 552.271(a)–(c)

*Exception for
Certain Small
Districts*

If a district has fewer than 16 full-time employees, the payment, deposit, or bond may be required only if:

1. The information specifically requested by the requestor is older than three years or completely fills, or when assembled will completely fill, three or more archival boxes; and
2. The officer for public information or agent estimates that more than two hours will be required to make the information available for inspection.

Gov't Code 552.271(d)

*Inspection of
Electronic
Records*

In response to a request to inspect information that exists in an electronic medium and that is not available directly online to the requestor, a charge may not be imposed for access to the information unless complying with the request will require programming or manipulation of data. If programming or manipulation of data is required, a district shall notify the requestor before assembling the information and provide the requestor with an estimate of charges that will be imposed to make the information available [see also Requests Requiring Programming or Data Manipulation, above].

If public information exists in an electronic form on a computer owned or leased by a district and if the public has direct access to that computer through a computer network or other means, the electronic form of the information may be electronically copied from that computer without charge if accessing the information does not require processing, programming, or manipulation on the district-

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owned or district-leased computer before the information is copied. If such information also requires processing, programming, or manipulation before it can be electronically copied, a district may impose charges.

If information is created or kept in an electronic form, a district is encouraged to explore options to separate confidential information from public information and make the public information available to the public through electronic access through a computer network or by other means.

Gov't Code 552.272

Itemized Estimate
of Charges

If a request for a copy of public information will result in the imposition of a charge that exceeds \$40, or a request to inspect a paper record without requesting copies will result in the imposition of a charge that exceeds \$40, a district shall provide the requestor with a written itemized statement that details all estimated charges that will be imposed, including any allowable charges for labor or personnel costs. If an alternative less costly method of viewing the records is available, the statement must include a notice that the requestor may contact the district regarding the alternative method. A district must inform the requestor of the responsibilities imposed on the requestor by Government Code 552.2615 and the rights granted by that section and give the requestor the information needed to respond as detailed in Government Code 552.2615(a).

If, after a district provides the requestor the itemized statement but before it makes the copy or the paper record available, the district determines that the estimated charges will exceed the charges detailed in the original itemized statement by 20 percent or more, the district shall send to the requestor an updated written itemized statement that details all estimated charges that will be imposed, including any allowable charges for labor or personnel costs.

*Requestor's
Response*

A request for which a district is required to produce an (original or updated) itemized statement of estimated charges is considered to have been withdrawn if the requestor does not respond in writing to the itemized statement by informing the district within ten business days after the date the statement is sent to the requestor that:

1. The requestor will accept the estimated charges;
2. The requestor is modifying the request in response to the itemized statement; or
3. The requestor has sent to the attorney general a complaint alleging that the requestor has been overcharged for being provided with a copy of the public information.

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- Actual Charges* If the actual charges exceed \$40, the charges may not exceed:
1. The amount estimated in the updated itemized statement; or
 2. If an updated itemized statement is not sent to the requestor, an amount that exceeds by 20 percent or more the amount estimated in the original itemized statement.

- No Effect on
Deadlines To
Request Attorney
General Decision* An original or updated itemized statement is considered to have been sent by a district, and a requestor is considered to have responded to the statement, on the date that the statement or response is:
1. Delivered in person;
 2. Deposited, properly addressed, in the United States mail; or
 3. Transmitted by electronic mail or facsimile, provided the requestor agrees to receive the statement by those means.

The time deadlines for providing or responding to the required statement of estimated charges do not affect the application of a time deadline imposed on a district for requesting a decision by the attorney general under Government Code Chapter 552, Subchapter G.

Gov't Code 552.2615

**Temporary
Suspension of
Requirements for
Districts Impacted by
Catastrophe**

The requirements of the Public Information Act do not apply to a district that is currently significantly impacted by a catastrophe such that the catastrophe directly causes the inability of the district to comply with the requirements of the PIA and the district complies with requirements below to elect a suspension period.

"Catastrophe" means a condition or occurrence that directly interferes with the ability of a district to comply with the requirements of the PIA, including:

1. Fire, flood, earthquake, hurricane, tornado, or wind, rain, or snow storm;
2. Power failure, transportation failure, or interruption of communication facilities;
3. Epidemic; or
4. Riot, civil disturbance, enemy attack, or other actual or threatened act of lawlessness or violence.

"Catastrophe" does not mean a period when staff is required to work remotely and can access information responsive to an appli-

cation for information electronically, but the physical office of the governmental body is closed.

“Suspension period” means the period of time during which a district may suspend the applicability of the requirements of the Public Information Act.

Initial Suspension
Period

A district may suspend the applicability of the Public Information Act to the district for an initial suspension period only once for each catastrophe, which may not exceed seven consecutive days and must occur during the period that:

1. Begins not earlier than the second day before the date the district submits notice to the attorney general; and
2. Ends not later than the seventh day after the date the district submits that notice.

Extension of Initial
Suspension Period

A board may extend an initial suspension period if the board determines that the district is still impacted by the catastrophe on which the initial suspension period was based. The initial suspension period may be extended one time for not more than seven consecutive days that begin on the day following the day the initial suspension period ends.

Maximum
Suspension Period
Per Catastrophe

A board that initiates an initial suspension period may not initiate another suspension period related to the same catastrophe, except for a single extension period as described above.

The combined suspension period for a district filing for both an initial suspension period and a subsequent extension may not exceed a total of 14 consecutive calendar days with respect to any single catastrophe.

Upon conclusion of any suspension period the district shall immediately resume compliance with all requirements of the Public Information Act.

Notices to the
Attorney General

A district that elects to suspend the Public Information Act must submit notice to the attorney general that the district is currently impacted by a catastrophe and has elected to suspend the applicability of the PIA during the initial suspension period.

A board that elects to extend an initial suspension period must submit notice of the extension on the form prescribed by the attorney general.

The notices on the form prescribed by the attorney general must require the district to:

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1. Identify and describe the catastrophe that the district is currently impacted by;
2. State the date the initial suspension period determined by the board begins and the date that period ends;
3. If the board has determined to extend the initial suspension period:
 - a. State that the district continues to be impacted by the catastrophe; and
 - b. State the date the extension to the initial suspension period begins and the date the period ends; and
4. Provide any other information the office of the attorney general determines necessary.

Notice to the Public A district that elects to suspend the Public Information Act must provide notice to the public of the suspension in a place readily accessible to the public and in each other location the district is required to post a notice under Government Code Chapter 551, Subchapter C (Notice of Meetings). The district must maintain the notice of the suspension during the suspension period.

Requests During Suspension Period Notwithstanding another provision of the Public Information Act, a request for public information received by a district during a suspension period is considered to have been received by the district on the first business day after the date the suspension period ends.

Pending Requests Tolloed A request for public information received by a district before the date an initial suspension period begins are tolloed until the first business day after the date the suspension period ends.

Gov't Code 552.2325(a)–(j), (l), (m)

Large or Frequent Requests

Annual Limits on
Personnel Time

A district may establish reasonable monthly and yearly limits on the amount of time that district employees are required to spend producing public information for inspection or duplication by a requestor, or providing copies of public information to a requestor, without recovering its costs attributable to that personnel time. A yearly time limit may not be less than 36 hours for a requestor during the 12-month period that corresponds to a district's fiscal year. A monthly time limit may not be less than 15 hours for a requestor for a one-month period.

Request by Minor

In determining whether a time limit applies, any time spent complying with a request submitted in the name of a minor, as defined by Family Code 101.003(a), is to be included in the calculation of the cumulative amount of time spent complying with a request for public information by a parent, guardian, or other person who has con-

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trol of the minor under a court order and with whom the minor resides, unless that parent, guardian, or other person establishes that another person submitted that request in the name of the minor.

Gov't Code 552.275(a), (b), (c)

Written Statement
of Cumulative
Personnel Time

If a district establishes a time limit, each time the district complies with a request for public information, the district shall provide the requestor with a written statement of the amount of personnel time spent complying with that request and the cumulative amount of time spent complying with requests for public information from that requestor during the applicable monthly or yearly period. The amount of time spent preparing the written statement may not be included in the amount of time included in the statement to the requestor. *Gov't Code 552.275(d)*

*Written Estimate
of Charges
Beyond Time
Limit*

Subject to unpaid cost estimates for large and frequent requests, as described below, if in connection with a request for public information, the cumulative amount of personnel time spent complying with requests for public information from the same requestor equals or exceeds the district-established time limit, the district shall provide the requestor with a written estimate of the total cost, including materials, personnel time, and overhead expenses, necessary to comply with the request. The written estimate must be provided to the requestor on or before the tenth day after the date on which the public information was requested. The amount of this charge relating to the cost of locating, compiling, and producing the public information shall be established by rules prescribed by the attorney general under Government Code 552.262(a) and (b).

Additional Time

If a district provides the requestor with written notice that additional time is required to prepare the written estimate, the district must provide the written estimate as soon as practicable, but on or before the tenth day after the date the district provided the notice that additional time was required.

Gov't Code 552.275(e), (f)

Unpaid Cost
Estimate

When a request is made by a requestor who has made a previous request to the district that has not been withdrawn, for which the district has located and compiled documents in response, and for which the district has issued a written estimate of charges that remains unpaid on the date the requestor submits the new request, the district is not required to locate, compile, produce, or provide copies of documents or prepare an estimate of charges in response to a new request until the date the requestor pays each unpaid statement issued in connection with a previous request or

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withdraws the previous request to which the statement applies.
Gov't Code 552.275(e-1)

*Production Not
Required Until
Payment*

If a district provides a requestor with the estimate of charges and the district's time limits regarding the requestor have been exceeded, the district is not required to produce public information for inspection or duplication or to provide copies of public information in response to the requestor's request unless on or before the tenth day after the date the district provided the written estimate, the requestor submits payment of the amount stated in the written estimate.

If the requestor fails or refuses to submit payment, the requestor is considered to have withdrawn the request.

Gov't Code 552.275(g)-(h)

Exceptions

The provisions above concerning requests that require large amounts of employee or personnel time do not apply if the requestor is:

1. An individual who, for a substantial portion of the individual's livelihood or for substantial financial gain, gathers, compiles, prepares, collects, photographs, records, writes, edits, reports, investigates, processes, or publishes news or information for and is seeking the information for:
 - a. Dissemination by a news medium or communication service provider (as defined by Government Code 552.275(m)), including:
 - (1) An individual who supervises or assists in gathering, preparing, and disseminating the news or information; or
 - (2) An individual who is or was a journalist, scholar, or researcher employed by an institution of higher education at the time the person made the request for information; or
 - b. Creation or maintenance of an abstract plant as described by Insurance Code 2501.004.
2. An elected official of the United States, this state, or a political subdivision of this state.
3. A representative of a publicly funded legal services organization that is exempt from federal income taxation under Internal Revenue Code 501(a), as amended, by being listed as an exempt entity under 501(c)(3) of that code.

Gov't Code 552.275(j)-(l)

**Filing Suit to
Challenge Attorney
General's Decision**

The only suit a district may file seeking to withhold information from a requestor is a suit that:

1. Is filed in a Travis County district court against the attorney general in accordance with Government Code 552.325, and
2. Seeks declaratory relief from compliance with a decision by the attorney general issued under Government Code Chapter 552, Subchapter G.

The district must bring the suit not later than the 30th calendar day after the date the district receives the attorney general's decision determining that the requested information must be disclosed to the requestor. If the district does not bring suit within that period, the district shall comply with the decision of the attorney general.

**Exception for
Affirmative
Defenses**

If the district wishes to preserve an affirmative defense for its officer for public information as provided by Government Code 552.353(b)(3), the district must file suit not later than the tenth calendar day after receipt of the attorney general's decision.

Gov't Code 552.324, .353(b)(3)

**Suits Over Parent's
Request**

A district that seeks to withhold information from a parent who has requested public information relating to the parent's child under the Public Information Act, and that files suit as described by Government Code 552.324 to challenge a decision by the attorney general, must bring the suit not later than the 30th calendar day after the date the district receives the decision of the attorney general, unless an earlier deadline is established by the Public Information Act.

A court shall grant such a suit precedence over other pending matters to ensure prompt resolution of the subject matter of the suit. Notwithstanding any other law, a district may not appeal the decision of the court. This prohibition does not affect the right of a parent to appeal the decision. If a district does not bring suit within the period established, the district shall comply with the decision of the attorney general.

This provision does not affect the earlier deadline for purposes of Government Code 552.353(b)(3) (exception for affirmative defenses, above) for a suit brought by an officer for public information.

Education Code 26.0085

¹ Office of the Attorney General and the Public Information Act:
<https://www.texasattorneygeneral.gov/open-government/office-attorney-general-and-public-information-act>

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Note: The following legal provisions address the notification requirements and right of access to students when DFPS investigates reports of abuse and neglect at school. For additional legal provisions addressing reporting child abuse and neglect and investigations generally, see FFG.

Child Protective Investigations

A Texas Department of Family and Protective Services (DFPS) investigation of a report of child abuse or neglect under Family Code Chapter 261 may include an interview and examination of the subject child, which may be conducted at any reasonable time and place, including the child's school. A school official may not deny the request of an investigator, investigating a report of suspected child abuse or neglect, to interview, at school, a student who is an alleged victim. A school official may not condition granting the request on a requirement that school personnel, such as a counselor, attend the interview. *Family Code 261.302(a), (b); Atty. Gen. Op. DM-476 (1998)*

A person that has confidential locating or identifying information regarding a family that is the subject of an investigation under Family Code Chapter 261 shall release that information to DFPS on request. The release of information to DFPS by a person is not subject to Government Code 552.352 or any other law providing liability for the release of confidential information. *Family Code 261.303(e)*

Special Investigations

On receipt of a report of alleged or suspected child abuse or neglect in a public school, DFPS shall perform an investigation as provided by Family Code Chapter 261 and the rules adopted thereunder.

The Special Investigations program (SI) of the Child Protective Investigations division (CPI) of DFPS investigates allegations of abuse or neglect of a child by school personnel or volunteers in a school setting.

Family Code 261.406(a); 40 TAC 707.597-.625

Definitions

"School personnel and volunteers" means persons who have access to children in a school setting and are providing services to or caring for the children. School personnel include but are not limited to school employees, contractors, school volunteers, school bus drivers, school cafeteria staff, and school custodians.

"School setting" means the physical location of a child's school or of an event sponsored or approved by the child's school, or any other location where the child is in the care, custody, or control of

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school personnel in their official capacity, including transportation services. This does not include:

1. School settings involving only children in facilities regulated by the Texas Health and Human Services Commission (HHSC) when HHSC contracts with the local school district to provide education services; or
2. School settings that are a part of child care operations regulated by the Child Care Licensing division of HHSC.

40 TAC 707.605(6)–(7)

Notice to School
Personnel

Prior to conducting an investigation of school personnel or volunteers, SI shall notify the school principal (or the principal's supervisor if the school principal is an alleged perpetrator) of the fact that a report has been assigned for investigation, the nature of the allegations contained in the report, and the date and time SI plans to visit the school campus to begin the investigation.

SI must also orally notify the superintendent about the investigation.

SI must request that the school personnel notified of the investigation not alert the alleged perpetrator or others regarding the report until SI has had an opportunity to interview the alleged perpetrator.

Family Code 261.105(d); 40 TAC 707.615

No Interference with
Investigation

School officials or other persons related to the school setting may not interfere with an investigation of a report of child abuse or neglect conducted by DFPS.

Interviews on
School Premises

Interviews and examinations in a school investigation may take place on or off the school premises, as deemed appropriate by SI, pursuant to all applicable standards. SI will notify appropriate school personnel prior to conducting an interview or visual inspection on school premises.

Presence of School
Personnel

SI may request that school personnel or volunteers not be present during the interview or visual inspection of an alleged victim, an alleged perpetrator, an adult or child witness, or any other person who may have information relevant to the investigation if the investigator determines that:

1. The presence of school personnel or volunteers would compromise the integrity of the investigation; or
2. A better interview or examination of the child would result without school personnel or volunteers being present.

Family Code 261.303(a); 40 TAC 707.619(a)

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Report of Findings

After the completion of an investigation, SI must provide a report of the investigation, redacted to remove the identity of the reporter, to the Texas Education Agency (Director of Education Investigations) for an investigation concerning an employee of the district. On request, SI shall provide a redacted copy of the report to the following:

1. State Board for Educator Certification;
2. The president of the school board;
3. The superintendent; and
4. The school principal, unless the principal is the alleged perpetrator.

SI is not required to provide notice to a school official if it administratively closes a report of abuse or neglect prior to notifying school officials that DFPS received a report of abuse or neglect in the school setting.

Family Code 261.406(b); 40 TAC 707.623

**Prohibited Law
Enforcement
Citations**

For this provision, a “school offense” means an offense committed by a child enrolled in a public school that is a Class C misdemeanor other than a traffic offense and that is committed on property under the control and jurisdiction of a school district. “Child” means a person who is a student and at least ten years of age and younger than 18 years of age.

A peace officer, law enforcement officer, or school resource officer may not issue a citation to a child who is alleged to have committed a school offense. Education Code Chapter 37, Subchapter E-1 (Criminal Procedure) does not prohibit a child from being taken into custody under Family Code 52.01 (described below).

Education Code 37.141, .143

**Students Taken into
Custody**

For the following provisions, “child” means a person who is:

1. Ten years of age or older and under 17 years of age, or
2. Seventeen years of age or older and under 18 years of age who is alleged or found to have engaged in delinquent conduct or conduct indicating a need for supervision as a result of acts committed before becoming 17 years of age.

Family Code 51.02(2)

A child may be taken into custody under Family Code Title 3 (Juvenile Justice Code):

RELATIONS WITH GOVERNMENTAL ENTITIES
STATE AND LOCAL GOVERNMENTAL AUTHORITIES

GRA
(LEGAL)

1. Pursuant to an order of the juvenile court.
2. Pursuant to the laws of arrest.
3. By a law enforcement officer, including a school district peace officer, if there is probable cause to believe the student has engaged in a criminal violation, delinquent conduct, conduct indicating a need for supervision, or conduct that violates a condition of probation.
4. By a probation officer, if there is probable cause to believe the student has violated a condition of probation or a condition of release.
5. Pursuant to a directive to apprehend issued by a juvenile court.
6. By a law enforcement officer, to take the child's fingerprints or photograph, as set forth at Family Code 58.0021.

Family Code 52.01(a), 58.0021

In addition, a child may be taken into custody without a court order:

1. By an authorized representative of the DFPS, a law enforcement officer, or a juvenile probation officer under the conditions set out in Family Code 262.104, relating to the student's physical health or safety; or
2. As otherwise provided by Family Code Chapter 262 (Suit by Governmental Entity to Protect Health and Safety of Child).

Family Code Ch. 262

Students in Custody

A person taking a child into custody may, if school is in session and the child is a student, bring the child to the campus to which the child is assigned if the principal, the principal's designee, or a peace officer assigned to the campus agrees to assume responsibility for the child for the remainder of the school day. *Family Code 52.02(a)(7)*

Waco Independent School District

Board of Trustee Meeting Agenda Item

Date: June 29, 2023

Contact Person: Kourtni Parnell/Deena Cornblum

RE: Intent to Apply for Federal Every Student Succeeds Act (ESSA) Funds
=====

Background Information:

Each year Waco ISD submits an application for the Every Student Succeeds Act (ESSA) Consolidated Federal Grant through the Elementary and Secondary Education (ESEA) Act. The Texas Education Agency has notified the District of its grant entitlements for 2023-2024. An application will be submitted for each of the following entitlements:

Title I, Part A – Improving the Academic Achievement of Students

Planning Amount: \$6,643,271.00

Purpose: Provide all children a significant opportunity to receive a fair, equitable, and high-quality education to close educational achievement gaps.

Title II, Part A – Preparing, Training, and Recruiting High-Quality Teachers and Principals

Planning Amount: \$764,131.00

Purpose: Provide educators (teachers, principals and school leaders) support in their work to improve the overall quality of instruction and ensure equity of educational opportunity for all students.

Title III, Part A – Language Instruction for English Learners and Immigrant Students

Planning Amount: \$294,733.00

Purpose: Provide English learners, including immigrant children and youth, the necessary support to attain English proficiency, develop high levels of academic attainment in English, and meet the same challenging State academic content and student academic achievement standards as all children are expected to meet.

Title IV, Part A – Student Support and Academic Enrichment

Planning Amount: \$554,724.00

Purpose: Provide access to opportunities for a well-rounded education for all students, improve school conditions for student learning in order to create a

healthy and safe school environment; and improve access to personalized learning experiences supported by technology and professional development for the effective use of technology.

The attached presentation outlines the District's plans for the use of these federal funds for the 2023-2024 school year and related stakeholder feedback that was collected for the plan.

Fiscal Implications:

Funding entitlements are included in campus and district budgets for planning purposes.

Administrative Recommendation(s):

Report Only

Intent to Apply for Federal

Every Student Succeeds Act (ESSA) Funds

ESSA Federal Grant Funds for Federal Programs



ESSA Funds are...



ESSA Federal Grant



- Title I, Part A funds must be allocated to campuses in rank order on the basis of the total number of low-income students in each attendance area.
- There is no statutory required percent of funds to be allocated to campuses.
- If an LEA reserves more than 30% of funds at the district level, a TEA justification is required.

2023-24 ESSA AWARDS



TITLE I

Ensures low income or economically dsavantages students receive quality education and meet state achievement standards



TITLE II

Increase student achievement by training and recruiting high quality teachers, principals, and other school leaders



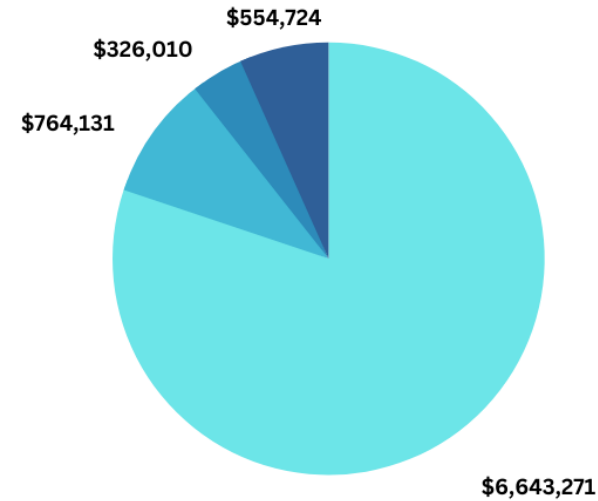
TITLE III

Ensures English learners attain English proficiency at high levels in academic subjects and can meet state achievement performance standards.



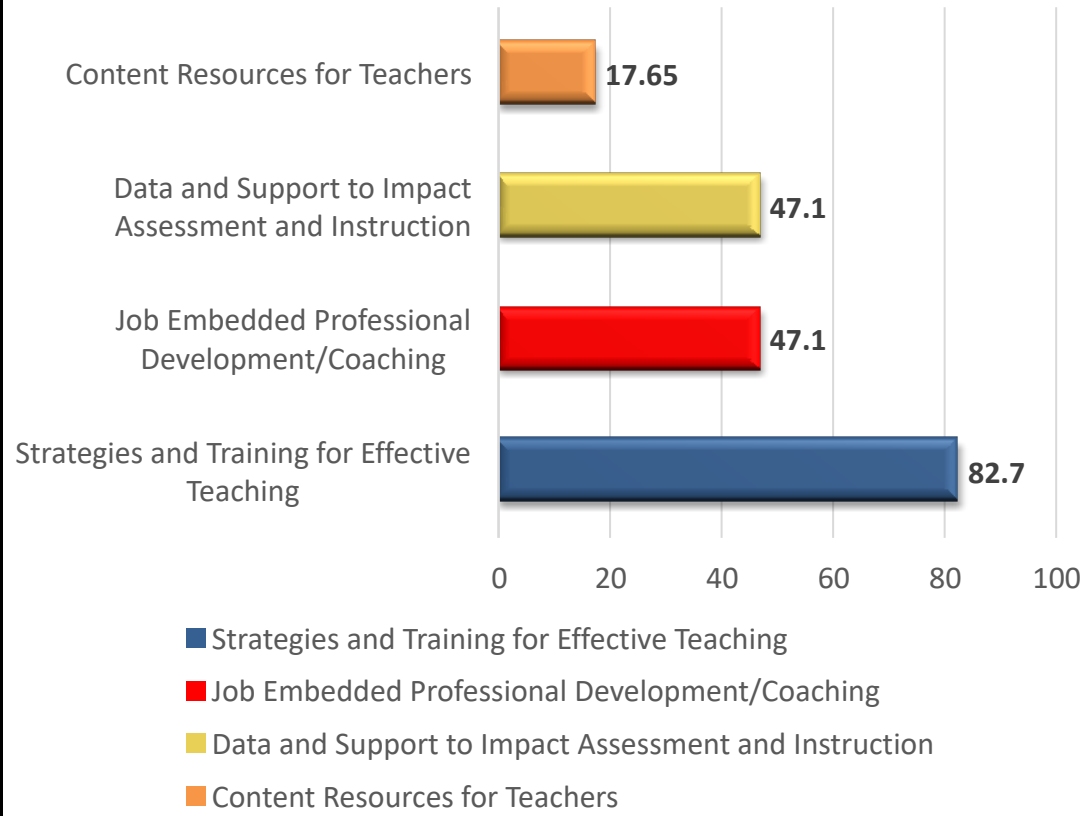
TITLE IV

Provide students with a well-rounded education, conditions for student learning (safe and healthy students), and improve the use of technology for academic outcomes and digital literacy

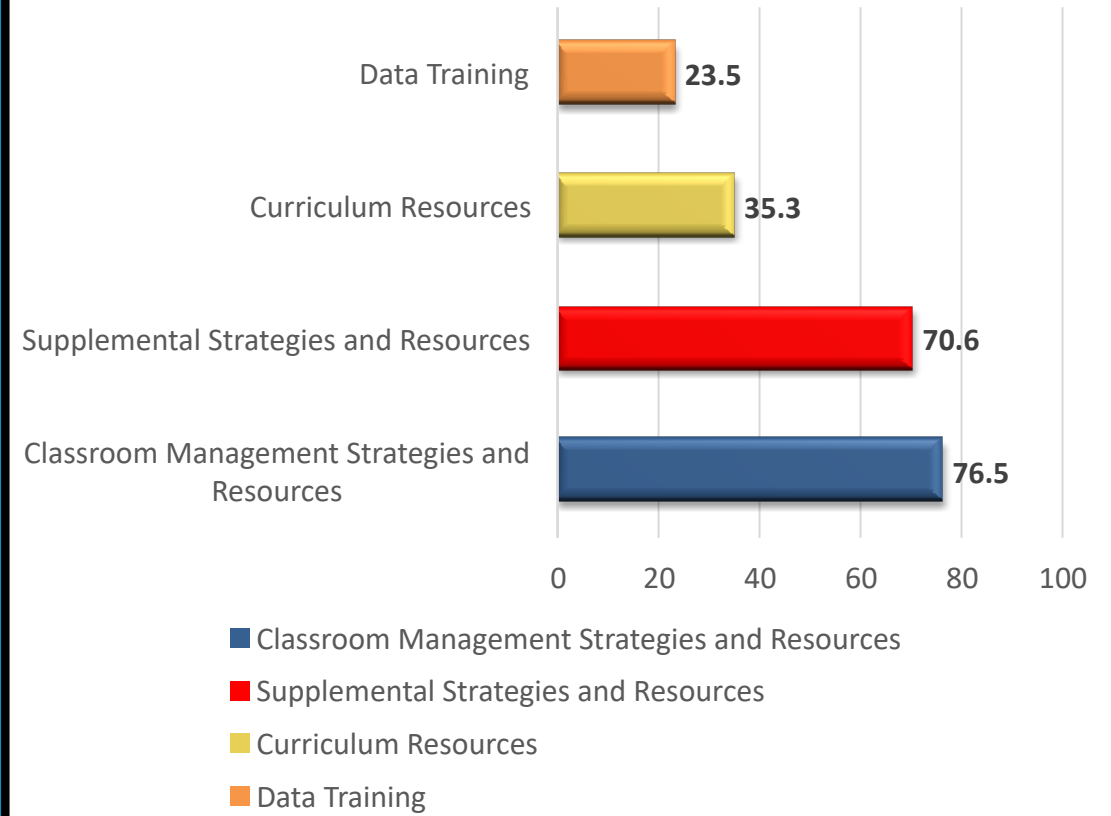


Required Stakeholder Feedback

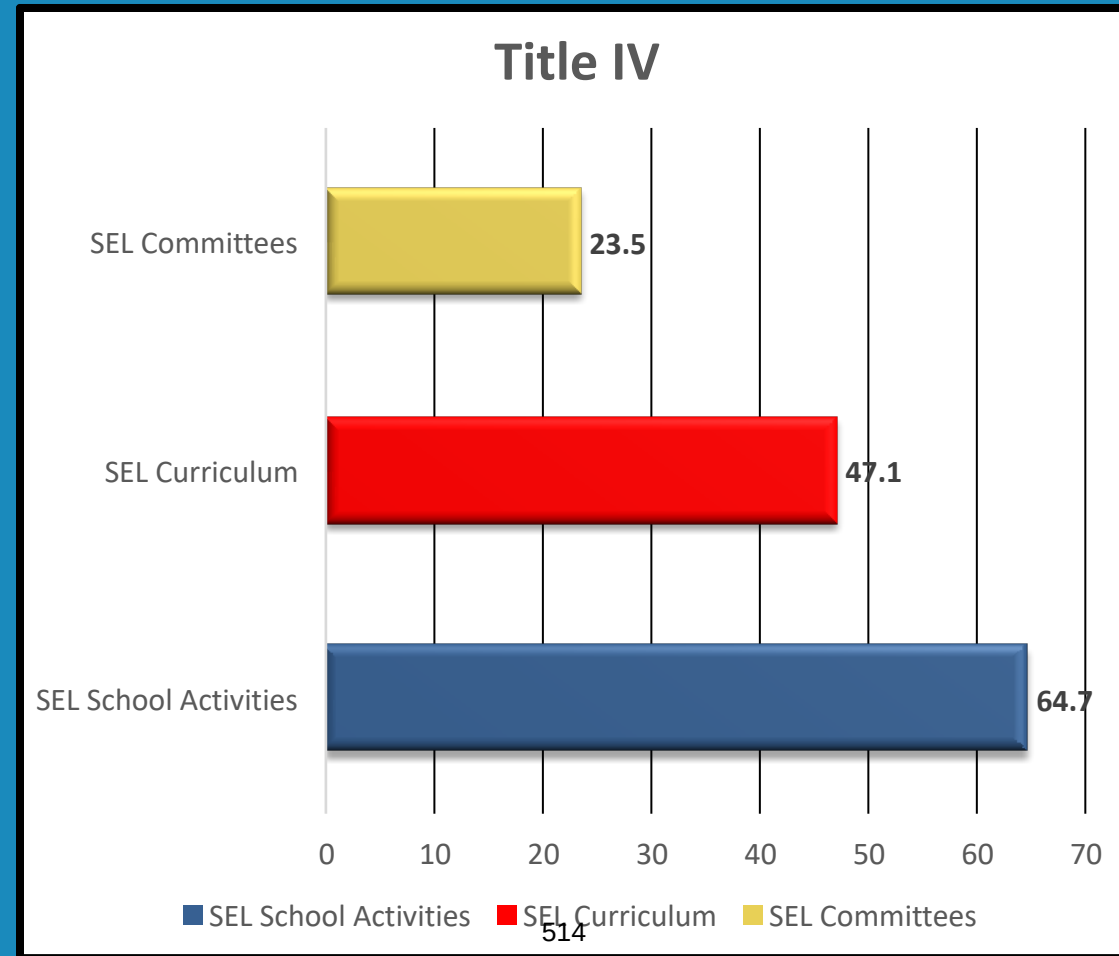
Title I



Title II



Required Stakeholder Feedback



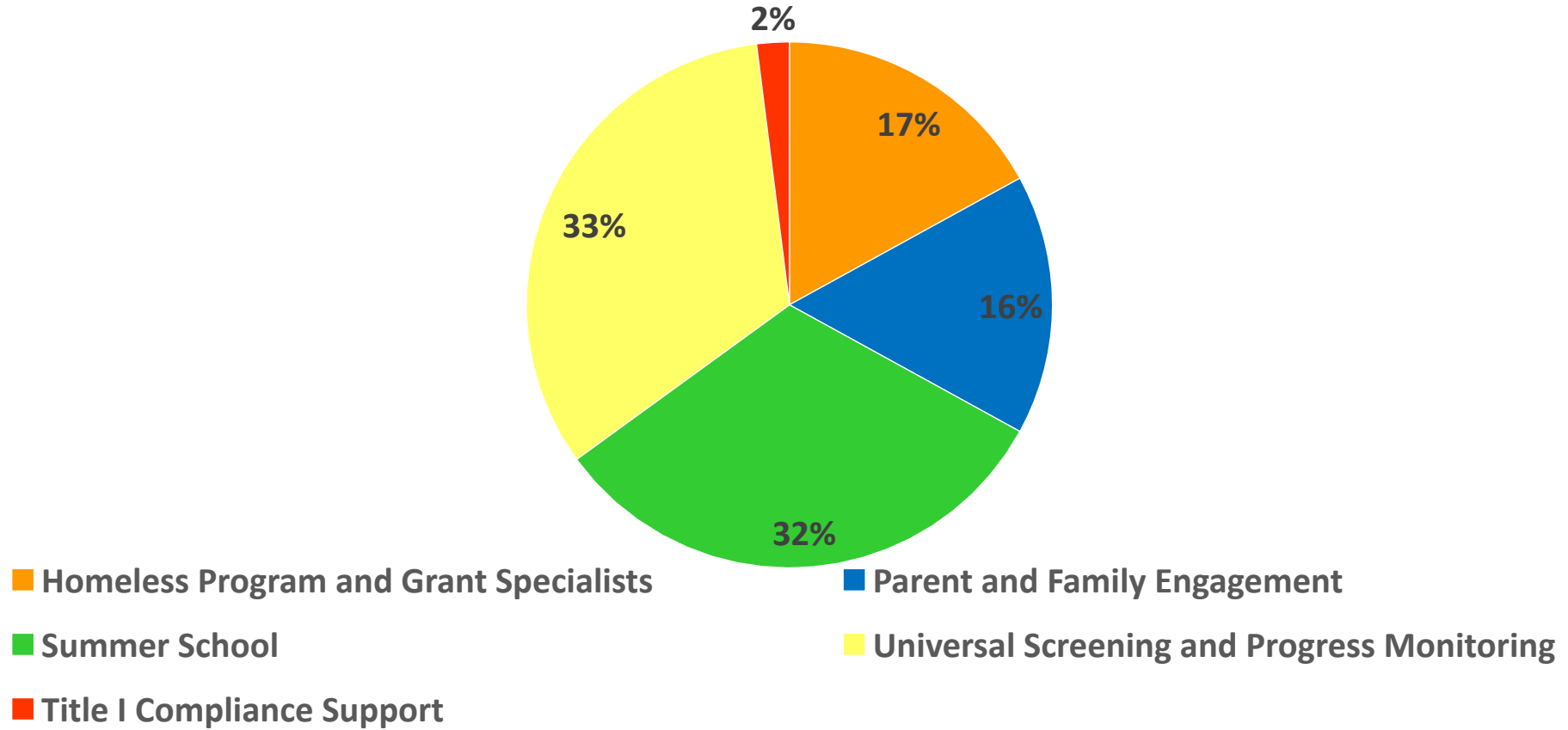
ESSA Federal Grant



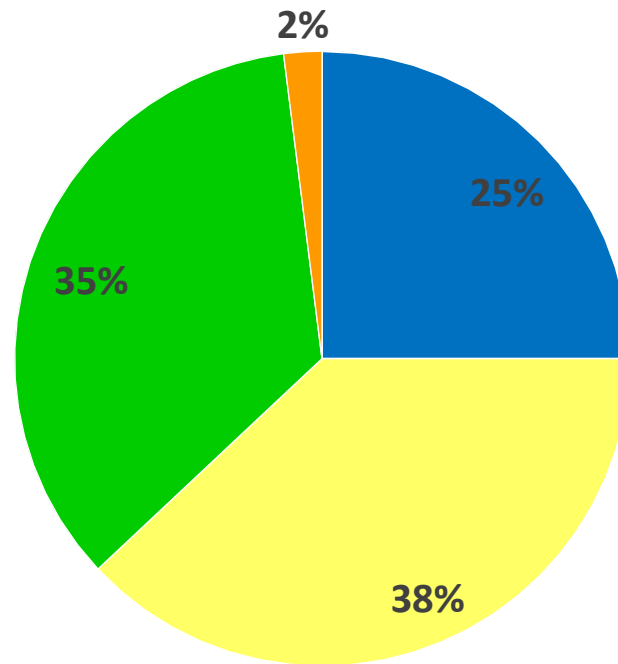
Waco ISD 2023-2024 Planned Allocation Distribution

- 75% to campuses
- 20% maintained at the district level to support district-wide instructional resources, summer school, and parent family engagement activities
- 5% set aside for indirect costs and private school/nonprofit required allocations

Title I Planned District Expenditures



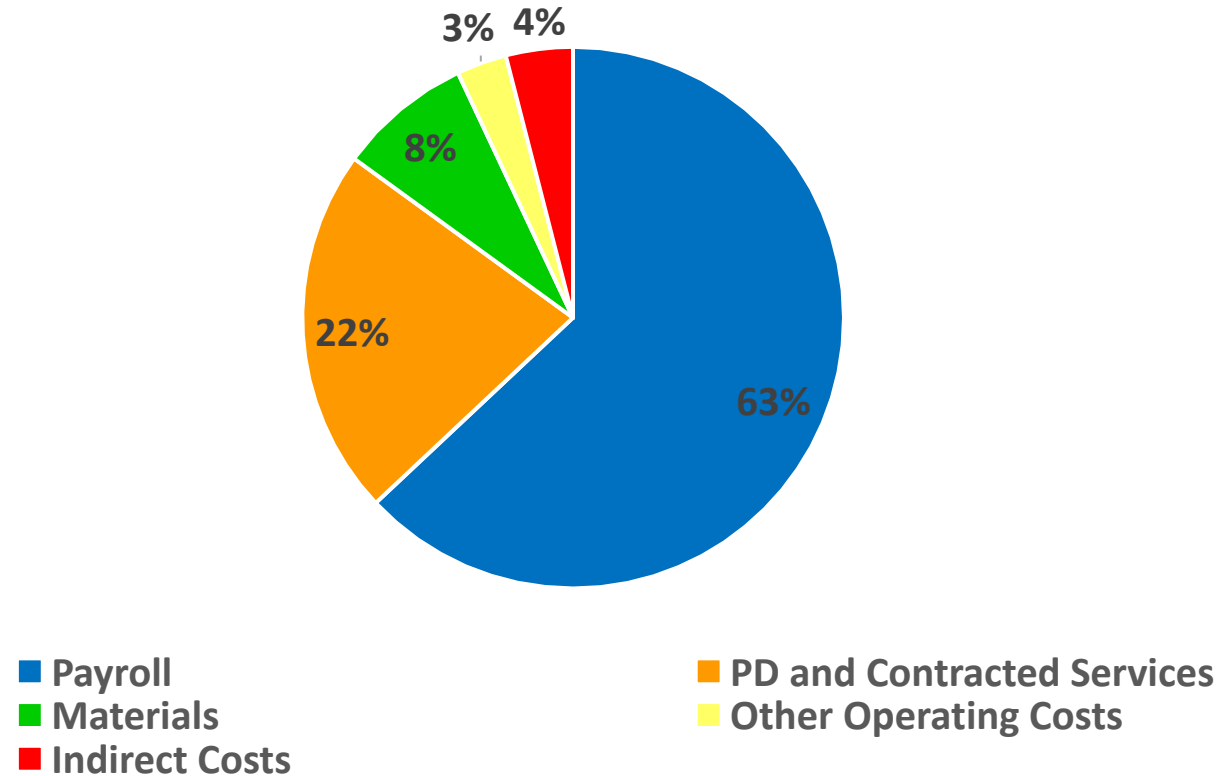
Title II Planned District Expenditures



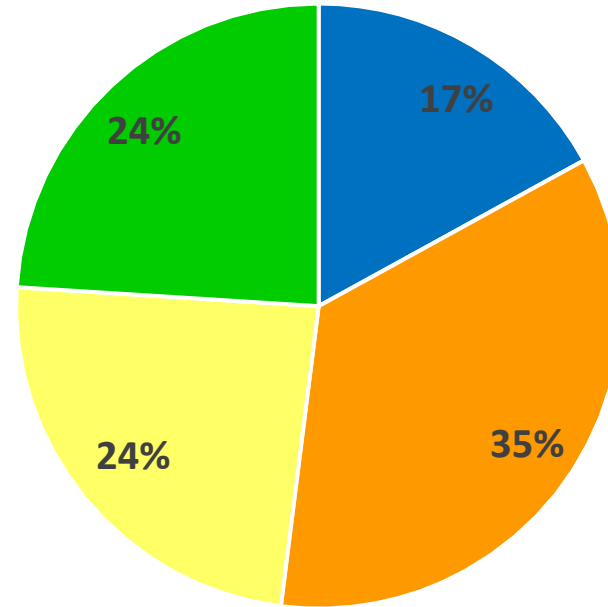
■ Professional Development
■ Supplemental Pay and Salaries

■ Accountability and Curriculum Resources
■ Professional Travel

Title III Planned District Expenditures



Title IV Planned District Expenditures



■ Advanced Academics and Scholars

■ SEL and Mental Health

■ Technology PD and LMS

■ Still to be Allocated

Private School/Nonprofit Allocations



Private School Funding Source	Allocation	Percentage of Budget
Title I	14,000	0.2%
Title II	90,000	12%
Title III	\$0	0%
Title IV	72,000	16%

Waco Independent School District
Board of Trustee Meeting Agenda Item

Date: June 29, 2023

Contact Person: Sheryl Davis

RE: Amendments to the 2022-2023 Budget

=====

Background Information:

The Texas Education Agency has established additional requirements for school district budget preparation. As part of these requirements, a school district must amend the official budget before exceeding a functional expenditure category, i.e., instruction, administration, etc., in the total district budget. Attached are copies of the proposed amendments to the Official Budget identifying details of the requests. The following summarizes the effect of these amendments by functional category.

Summary:

Amendment #053: Brazos High School (Fund 199)

This amendment will realign funds from miscellaneous instructional operating costs to guidance, counseling, and evaluation services for counselor supplies. These adjustments are required to appropriately reclassify the budget to the proper expenditure codes per TEA accounting guidelines.

			<u>TEA Revenue/Function Description</u>
Source of Funds:	\$	50	Instruction
Use of Funds:	\$	50	Guidance, Counseling & Evaluation Services
Fund Balance Effect		None	

Amendment #054 Cesar Chavez Middle School (Fund 199)

This amendment will realign funds from school leadership travel and extracurricular travel and services to curriculum and instructional staff development for Education Services Center services for instructional coaching. These adjustments are required to appropriately reclassify the budget to the proper expenditure codes per TEA accounting guidelines.

			<u>TEA Revenue/Function Description</u>
Source of Funds:	\$	5,700	School Leadership, Extracurricular Activities
Use of Funds:	\$	5,700	Curriculum & Instructional Staff Development
Fund Balance Effect		None	

Amendment #055: Mountainview Elementary School (Fund 199)

This amendment will realign funds from instructional extra-duty and curriculum and instructional staff development travel and other operating costs to school leadership supplies and other operating costs. These adjustments are required to appropriately reclassify the budget to the proper expenditure codes per TEA accounting guidelines.

			<u>TEA Revenue/Function Description</u>
Source of Funds:	\$	4,173	Instruction, Curriculum & Instructional Staff Development
Use of Funds:	\$	4,173	School Leadership
Fund Balance Effect		None	

Amendment #056: South Waco Elementary School (Fund 199)

This amendment will realign funds from curriculum and instructional staff development travel to instructional supplies. These adjustments are required to appropriately reclassify the budget to the proper expenditure codes per TEA accounting guidelines.

			<u>TEA Revenue/Function Description</u>
Source of Funds:	\$	8,672	Curriculum & Instructional Staff Development
Use of Funds:	\$	8,672	Instruction
Fund Balance Effect		None	

Amendment #057: University High School (Fund 199)

This amendment will realign excess funds from instruction, instructional resources and media, curriculum and instructional staff development, guidance, counseling and evaluation services, social work services, health services, security and monitoring services, and community services in various object codes to school leadership extra-duty and supplies for registration costs. These adjustments are required to appropriately reclassify the budget to the proper expenditure codes per TEA accounting guidelines.

			<u>TEA Revenue/Function Description</u>
Source of Funds:	\$	9,853	Instruction, Instructional Resources & Media Services, Curriculum & Instructional Staff Development, Guidance, Counseling & Evaluation Services, Social Work Services, Health Services, Security & Monitoring Services, Community Services
Use of Funds:	\$	9,853	School Leadership
Fund Balance Effect		None	

Amendment #058: Advanced Academics (Fund 199)

This amendment will realign excess funds from instructional fees for testing to curriculum and instructional staff development supplies. These adjustments are required to appropriately reclassify the budget to the proper expenditure codes per TEA accounting guidelines.

			<u>TEA Revenue/Function Description</u>
Source of Funds:	\$	4,000	Instruction
Use of Funds:	\$	4,000	Curriculum & Instructional Staff Development
Fund Balance Effect		None	

Amendment #059: Advanced Academics (Fund 199)

This amendment will realign funds from instructional fees for testing to curriculum and instructional staff development for miscellaneous operating costs. These adjustments are required to appropriately reclassify the budget to the proper expenditure codes per TEA accounting guidelines.

			<u>TEA Revenue/Function Description</u>
Source of Funds:	\$	10,000	Instruction
Use of Funds:	\$	10,000	Curriculum & Instructional Staff Development
Fund Balance Effect		None	

Amendment #060: Elementary Education (Fund 199)

This amendment will realign excess funds from curriculum and instructional staff development and instructional leadership in various object codes to instruction supplies and software for mathematics instruction. These adjustments are required to

appropriately reclassify the budget to the proper expenditure codes per TEA accounting guidelines.

		<u>TEA Revenue/Function Description</u>
Source of Funds:	\$ 14,261	Curriculum & Instructional Staff Development
Use of Funds:	\$ 14,261	Instruction
Fund Balance Effect	None	

Amendment #061: Secondary Education (Fund 199)

This amendment will realign excess funds from instruction in various object codes to curriculum and instructional staff development for extra-duty and contracted services training and curriculum writing. These adjustments are required to appropriately reclassify the budget to the proper expenditure codes per TEA accounting guidelines.

		<u>TEA Revenue/Function Description</u>
Source of Funds:	\$ 9,683	Instruction
Use of Funds:	\$ 9,683	Curriculum & Instructional Staff Development
Fund Balance Effect	None	

Amendment #062: Student Services and Support (Fund 199)

This amendment will realign excess funds from instructional leadership contracted services to guidance, counseling and evaluation services for miscellaneous operating costs for the counselor retreat. These adjustments are required to appropriately reclassify the budget to the proper expenditure codes per TEA accounting guidelines.

		<u>TEA Revenue/Function Description</u>
Source of Funds:	\$ 6,600	Instructional Leadership
Use of Funds:	\$ 6,600	Guidance, Counseling & Evaluation Services
Fund Balance Effect	None	

Amendment #063: Districtwide Teacher Incentive Allotment (Fund 199)

This amendment will place budget for payouts to teachers and principals and administrative costs funded through the 2022 and 2023 State Foundation Program's Teacher Incentive Allotment. These adjustments are required to appropriately reclassify the budget to the proper expenditure codes per TEA accounting guidelines.

		<u>TEA Revenue/Function Description</u>
Source of Funds:	\$ 1,466,688	State Program Revenue
Use of Funds:	\$ 1,466,688	Instruction, School Leadership, General Administration
Fund Balance Effect	None	

Amendment #064: National School Lunch and Breakfast Program (Fund 240)

This amendment will utilize funds from the restricted fund balance for contracted services and equipment for child nutrition programs. The planned expenditures are part of an approved plan to draw down the District's excess fund balance in Fund 240. These adjustments are required to appropriately reclassify the budget to the proper expenditure codes per TEA accounting guidelines.

		<u>TEA Revenue/Function Description</u>
Source of Funds:	\$ 666,100	Restricted-Federal/State Funds
Use of Funds:	\$ 666,100	Food Services
Fund Balance Effect	Decrease	

A copy of the amendments are attached for your review detailing line items to be adjusted.

Fiscal Implications:

Amendments #053 through #063 have no impact on the general fund unassigned fund balance. Amendment #064 decreases the restricted fund balance in the National School Lunch and Breakfast fund.

Administrative Recommendation(s):

The administration recommends that the Board of Trustees approve the budget amendments, as presented.

AMENDMENT # 053

DATE: 6/6/2023

0.00

~~CHIEF FINANCIAL OFFICER~~

Revised 10/2017

AMENDMENT # 054

Cesar Chavez Middle School

DATE: 5/21/2023

0

Realigning funds to cover Instructional Coaching services for teachers from Region 12 during the school year.


Chief Financial Officer

526

AMENDMENT # 055

DATE: 6/5/2023

0

[Signature]
BUDGET ADMINISTRATOR /
DEPARTMENT HEAD


Cheryl Davis
Chief Financial Officer

Revised 01/2021

AMENDMENT # 056

DATE: 5/30/2023

0

Money is needed to purchase general supplies and materials that will be used for at- risk students to increase academic standards


Chief Financial Officer

Revised 01/2021

**WACO INDEPENDENT SCHOOL DISTRICT
AMENDMENT BUDGET FORM**

AMENDMENT # 057

CAMPUS OR DEPARTMENT: University High School

DATE: 6/15/2023

								A	B	C	D
BUDGET CODE								CURRENT APPROPRIATION	CURRENT ACCOUNT BALANCE	REQUESTED INCREASE (DECREASE)	AMENDED APPROPRIATION
FUND	FNC	OBJ	SO	ORG	PRG	LOPT	DESCRIPTION				
199	11	6299	00	003	11	000	Other Misc. Contracted Services	3,594	114.85	(114)	3,480
199	11	6249	00	003	11	000	Other Contracted Maintenance & Rep	200	200.00	(200)	0
199	11	6497	00	003	11	000	Fees	2,100	2,100.00	(2,100)	0
199	11	6499	00	003	11	000	Miscellaneous Operating Costs	27,572	4,420.01	(4,420)	23,152
199	11	6499	00	003	11	683	Miscellaneous Operating Costs	250	250.00	(250)	0
199	11	6399	00	003	11	683	Other General Supplies & Materials	400	400.00	(400)	0
199	12	6329	00	003	99	000	Other Reading Materials	2,492	4.59	(4)	2,488
199	12	6399	00	003	99	000	Other General Supplies & Materials	3,308	104.75	(104)	3,204
199	13	6411	00	003	99	000	Travel Costs-Employee Only	6,949	251.22	(251)	6,698
199	13	6499	00	003	99	000	Miscellaneous Operating Costs	6,303	525.26	(525)	5,778
199	31	6399	00	003	99	000	Other General Supplies & Materials	2,000	759.52	(759)	1,241
199	32	6121	00	003	99	000	Extra-duty/Overtime Support Staff	30	12.61	(12)	18
199	33	6399	00	003	99	000	Other General Supplies & Materials	1,500	21.31	(21)	1,479
199	52	6121	00	003	99	000	Extra-duty/Overtime Support Staff	1,000	183.31	(183)	817
199	61	6399	00	003	99	000	Other General Supplies & Materials	510	510.00	(510)	0
199	23	6121	00	003	99	000	Extra-duty/Overtime Support Staff	4,550	319.89	2,500	7,050
199	23	6399	00	003	99	000	Other General Supplies & Materials	16,462	0.77	7,353	23,815

0

REASON FOR REQUEST: Realigning Funds to cover cost of Registration and Administrative Purchases


BUDGET ADMINISTRATOR /
DEPARTMENT HEAD


Chief Financial Officer

YOU CANNOT REDUCE A BUDGET BY MORE THAN THE CURRENT ACCOUNT BALANCE AMOUNT.

AMENDMENT # 058

DATE: 5/22/2023

0

Kristo Sodergren
BUDGET ADMINISTRATOR /
DEPARTMENT HEAD


Chief Financial Officer

Revised 01/2021

AMENDMENT # 059

DATE: May 26, 2023

0BUDGET ADMINISTRATOR /
DEPARTMENT HEAD


Chief Financial Officer

Revised 01/2021

AMENDMENT # 060

DATE: 6/13/2023

0

REASON FOR REQUEST: Realigning budget to purchase products for mathematics instruction on campuses


Chief Financial Officer

Revised 01/2021

AMENDMENT # 061

DATE: 6/2/2023

0

Chief Financial Officer

Revised 01/2021

AMENDMENT # 062

DATE: 6/6/2023

REASON FOR REQUEST: Realigning funds originally allocated for miscellaneous contracted services to cover the cost of food for our counselor retreat in August.


Cheryl Davis
Chief Financial Officer

Revised 01/2021

AMENDMENT # 063

DATE: 6/21/2023

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Chief Financial Officer

**WACO INDEPENDENT SCHOOL DISTRICT
AMENDMENT BUDGET FORM**

AMENDMENT # 064

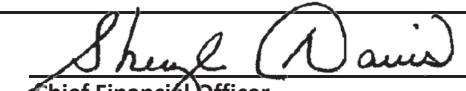
CAMPUS OR DEPARTMENT: National School Lunch and Breakfast Fund

DATE: 6/29/2023

BUDGET CODE							DESCRIPTION	A	B	C	D
FUND	FNC	OBJ	SO	ORG	PRG	LOPT		CURRENT APPROPRIATION	CURRENT ACCOUNT BALANCE	REQUESTED INCREASE (DECREASE)	AMENDED APPROPRIATION
240	35	6249	70	999	99	000	Other Contracted Maintenance & Repairs	220,000	11,558.56	30,000	250,000
240	35	6397	70	999	99	000	Equipment-Unit Cost < \$5000-Tracked	493,423	128,715.83	84,000	577,423
240	35	6399	70	999	99	000	Other General Supplies & Materials	275,345	100,686.82	40,900	316,245
240	35	6639	70	999	99	000	Furniture & Equipment-Unit Cost > \$5000	2,531,784	868,585.00	511,200	3,042,984
240	00	3450	00	000	00	000	Restricted - Federal/State Funds/Grants	-	(4,057,108.79)	666,100	666,100

REASON FOR REQUEST: This amendment will place budget to purchase kitchen equipment and rebuild the loading dock at Lake Air Montessori School.
Expenditures are necessary to further draw down the excess fund balance at August 31, 2022.

BUDGET ADMINISTRATOR / _____



 Chief Financial Officer

Waco Independent School District

Board of Trustee Meeting Agenda Item

Date: June 29, 2023

Contact Person: M. Tish/J. Allen

**RE: Bid Award for Educational Software for Virtual and Distance Learning
and other Miscellaneous Software**

=====

Background Information:

Request for Proposal, RFP # 20-1179-1, **Educational Software for Virtual and Distance Learning and other Miscellaneous Software**, had been issued and opened for the purpose of creating a list of approved vendors unique to the needs of the departments and campuses for any of their software needs, whether in the Classroom or for any remote or virtual learning needs. This solicitation was a supplemental bid in which additional vendor were given the opportunity to become approved on the already established original bid. The District received thirty (30) responses for this supplemental bid Purchasing from these vendors will be on an “as needed” basis. A list of responding vendors is attached for your review and acceptance. All valid responses were submitted, and as such, no evaluation scoresheet is attached.

This bid will expire on January 30, 2025. If additional vendors are needed, supplemental bids will be issued on an as needed basis.

Fiscal Implications:

The cost of these supplies will be charged to the appropriate campus/department budget.

Administrative Recommendation(s):

The Administration recommends that the Board of Trustees approve and award the list of vendors submitted for Educational Software for Virtual and Distance Learning and other Miscellaneous Software, as presented

Educational Software for Virtual Learning and Miscellaneous other Software

RFP # 20-1179-1

Responding Supplier:

Name	City	State
Age of Learning, Inc.	Glendale	CA
Committee for Children	Seattle	WA
DataDesign (DataDesign Solutions Holdings,LLC)	Monterey	CA
Ereflect Inc	Las Vegas	NV
Flinn Scientific Inc	Batavia	IL
Florida Virtual School	Orlando	FL
Gynzy	New York	NY
Houghton Mifflin Harcourt Publishing	Geneva	IL
Journeyed.com,Inc.	Allen	TX
Life is Learning, Inc.	Dallas	TX
Lone Star Learning (Lone Star Learning Sales & Marketing	Lubbock	TX
Mackin Educational Resources (Mackin Book Company)	Burnsville	MN
Newsela	New York City	NY
Nucleus Robotics, LLC	Los Angeles	CA
Okie Film Co (donnie curtis)	Waco	TX
OneScreen	San Diego	CA
Paradigm K12 Staffing Plus Inc	Lewes	DE
PickUp Patrol (PickUp Patrol LLC)	Mont Vernon	NH
Piraino Consulting, Inc.	College Station	TX
PropFuel	Marshfield Hills	MA
SchoolsPLP	Phoenix	AZ
Sergeant Laboratories, Inc	Onalaska	WI
Shafferware Technologies LLC	Austin	TX
StrongMind, Inc	Chandler	AZ
TalkingPoints	San Francisco	CA
Teachers Discovery (American Eagle Co Inc)	Auburn Hills	MI
thinkLaw	Las Vegas	NV
TinkRworks, Inc.	Elmhurst	IL
Ultimate Drill Book, Inc.	Austin	TX
zLabs, Inc.	Bethlehem	PA

Waco Independent School District

Board of Trustee Meeting Agenda Item

Date: June 29, 2023

Contact Person: M. Tish

RE: Bid Award for Library and Media Supplies & Equipment

=====

Background Information:

Request for Proposal, RFP # 20-1177-1, for **Library and Media Supplies & Equipment**, have been issued and opened for the purpose of soliciting addition vendors to the original bid by creating a list of approved vendors unique to the needs of the Campus Libraries and Classroom Reading Materials. This solicitation was a supplemental bid in which additional vendors were given the opportunity to become approved on the already established original bid. Purchasing from these vendors will be on an “as needed” basis. The District received twenty-eight (28) for this supplemental bid, however; six (6) vendors had already been approved in the original bid and as such are not being recommended. A list, of responding vendors, is attached for your review and acceptance. All valid responses were submitted, and as such, no evaluation scoresheets are attached.

This bid will expire November 30, 2025. If additional vendors are needed, supplemental bids will be issued on an as needed basis.

Fiscal Implications:

The cost of these supplies will be charged to the appropriate campus/department budget.

Administrative Recommendation(s):

The Administration recommends that the Board of Trustees approve and award the list of vendors submitted for Library and Media Supplies, & Equipment, as presented.

Library Media Supplies and Services
RFP # 20-1177-1

Name	City	State	Not Recommended
Bellwether Media	Minnetonka	MN	
Collide Creatve (Ryan A Thomas)	Waco	TX	
Cover One, Inc.	Denton	TX	
Different Roads to Learning	New York	NY	
EastWest Books (Lerner Publishing Group)	Minneapolis	MN	
Fabled Bookshop & Cafe (Fabled Endeavors LLC)	Waco	TX	
Garrett Book Company (Garrett Educational Corporation)	Ada	OK	Approved on Original Bid
J Appleseed, INC	Mankato	MN	
Kaeden Publishing (Kaeden Corporation)	Rocky River	OH	
Lakeview Books (Lerner Publishing Group)	Minneapolis	MN	
Lerner Publishing Group	Minneapolis	MN	
Mitinet, Inc	Bethany	MO	Approved on Original Bid
North Star Editions	Mendota Heights	MN	
Nucleus Robotics, LLC	Los Angeles	CA	
Red Brick Resoures	Apple Valley	MN	
Romeo Music	Coppell	TX	
Rosen Classroom Or Rosen Digital OR Jackdaw Publications (Rosen Publishing Group, Inc.)	New York	NY	Approved on Original Bid
Scholastic Library Publishing, Inc	New York	NY	Approved on Original Bid
School Specialty	Greenville	WI	Approved on Original Bid
Sebco Books (Library Sales, Inc.)	Pembroke Park	FL	Approved on Original Bid
Social Thinking (Think Social Publishing, Inc)	Santa Clara	CA	
Textbook Warehouse (Textbook Warehouse, LLC)	Alpharetta	GA	
The Penworthy Company	Milwaukee	WI	
Tumbleweed Press Inc.	Toronto	ON	
VIS Enterprises	Plano	TX	
Waseca Biomes	Athens	GA	
Willow Lane Education (Lerner Publishing Group Inc)	Minneapolis	MN	
YouthLight, Inc.	Chapin	SC	

Waco Independent School District

Board of Trustee Meeting Agenda Item

Date: June 29, 2023

Contact Person: M. Tish

RE: Bid Award for Educational Consulting, Professional Development, and Other Student-Based Contracted Services

=====

Background Information:

Request for Proposal, RFP # 21-1182, Educational Consulting, Professional Development, and Other Student-Based Contracted Services have been received for the purpose of creating a list of vendors which can service the District. We received fifteen (15) responses during the past month. The recommended vendors will be added to our previously approved list of two hundred forty-four (244) responses.

Examples of the types of services covered under this RFP are:

- Academic Educational Consultant
- Professional/Staff Development Training
- Motivational or Professional Speaker
- Program Review/Recommendation Services
- Data/Statistical Analysis
- Curriculum Design
- Evaluator Services
- Judging Services
- Technology Analysis/Consultant
- Operations Analysis/Consultant
- Grant Evaluation Services
- Presentations/Programs for staff and students (e.g. authors)
- Marching Band/Drill/Cheer Design and Choreography (includes camps)
- Theatre Coaching Services
- Instructors for outside of the school day classes (art, photography, gardening, tennis, Zumba, etc.)
- Speaker(s) for Assembly Programs
- Other services deemed appropriate for this request

In an effort to create inclusivity with our consulting, professional development, and student-based contracted services vendors and in light of changes made in 2019 by the Texas Education Agency's, Financial Accountability Systems Resource Guide (FASRG) Module 5 – Purchasing, the Business Services Department has elected to utilize the Extended Period for Multiple Award Contracts as shown in the FASRG excerpt shows.

3.16.6 Limited Response Period versus Extended Period for Multiple Award Contracts

Normal procurement practices will allow solicitation responses to be submitted to the district within a limited, specific time period, usually two to three weeks. The district may want to review past policies to determine if a limited response time is in the best interest of the district and the needs of its end users.

Consideration may need to be given to have an extended opening for receiving responses.

- **Limited Response Period.** This choice is considered a normal, formal RFP. Examples include newspaper advertisements and awards made and limited to only the responders that submitted and awarded for the solicitation.

- Extended Response Period. This choice is more informal than a limited response period. The major difference is the date the responses are due. This method allows for responses to be accepted throughout an extended period such as the date of the contract award expiration and awards made periodically. Periodic board approval may also be required. For newspaper advertisements, our District will continue to publicize periodic republication through our website and continue to enlist the assistance of the three (3) Chamber of Commerce's, as received on this first solicitation. The advertisement will address concerns about transparency by announcing the solicitation to new readers even though the statutory requirements were met by the initial publication.

The intent for awarding additional vendors to this bid will be done on an as needed basis. Vendors submitting a response by the end of each month will be submitted for consideration at the next board meeting.

Fiscal Implications:

The cost of these items will be charged to the appropriate campus/department budget.

Administrative Recommendation(s):

The Administration recommends that the Board of Trustees approve the additional fifteen (15) vendors for the Educational Consulting, Professional Development, and Other Student-Based Contracted Services bid, as presented.

Alton L Frailey & Associates, LLC (Alton Frailey)

Company Name: Alton L Frailey & Associates, LLC
Street Address: 29827 Forest Hill Lane
City, State, Zip: Fulshear, TX, 77406
Contact Name: Alton Frailey
Contact Phone Number: 832-748-0602
Contact Email Address: alfrailey@yahoo.com
Category of Service Provided: Professional/Staff Development Training
Target Audience: School Boards, Superintendents, Executive Leadership
Description of Services: Leadership Development, Community Engagement, School Board Training, Executive Coaching, Keynote Speaking
Pricing: Set fee for state-required Team of Eight Training, Keynote Speaker, and a daily fee for leadership development

Bayard Inc.

Company Name: Bayard Inc., dba Creative Communications
Street Address: 977 Hartford Tnpk, Unit A
City, State, Zip: Waterford, CT 06385
Contact Name: Dana Brydels
Contact Phone Number: 636-305-9777 x2164
Contact Email Address: dana.brydels@bayardinc.com
Category of Service Provided: Other applicable service
Target Audience: Students K-12
Description of Services: Student and teacher planners
Pricing: Price is based on quantity of product ordered

Christine Holecek

Company Name: Christine Holecek, Independent Consultant
Street Address: 602 S. Harrison
City, State, Zip: West, TX 76691
Contact Name: Christine Holecek
Contact Phone Number: 254-716-8789
Contact Email Address: chrisholecek@gmail.com
Category of Service Provided: Academic Educational Consultant
Target Audience: PTECH Campus: Dean, Staff and Students
Description of Services: Consulting and grant management services for the P-TECH Blueprint Best Practices Grant including coordinating Work Based Learning; Coordinate Seminar Fridays; Provide website updates and provide consulting for PTECH Dean and CTE Director
Pricing: \$40,000 for a 10 month contract

Crisis Prevention Institute

Company Name: Crisis Prevention Institute, Inc.
Street Address: 10850 W. Park Place, Suite 250
City, State, Zip: Milwaukee, WI 53224
Contact Name: Sarah Chambers
Contact Phone Number: 414-797-7420
Contact Email Address: CPIRFP@crisisprevention.com
Category of Service Provided: Professional/Staff Development Training
Target Audience: Teachers and School Administrators
Description of Services: CPI provides nonviolent crisis intervention, de-escalation, and behavior management training programs for teachers and school administrators: Provide a range of training levels depending on level of risk staff may encounter; Levels range from classroom behavior management and verbal interventions, to nonviolent crisis interventions and advanced physical skill interventions; Offer Train-the-Trainer Instructor Certification Programs and our training can be conducted entirely in-person or in a blended approach of both online and in-person instruction
Pricing: CPI Instructor Certification Programs are priced per person; various pricing for each component offered

Edvative Learning

Company Name: Edvative Learning
Street Address: 1615 Yagle ave
City, State, Zip: Prospect Park, Pennsylvania 19076
Contact Name: Samuel Mormando
Contact Phone Number: 484-832-6020
Contact Email Address: mormans@garnetvalley.org
Category of Service Provided: Professional/Staff Development Training
Target Audience: The target audience is one or more cohorts of K-12 teachers, instructional coaches, and school administrators. Cohorts of teachers are anywhere between 20-25 teachers from the same school or content area.
Description of Services: Ongoing instructional coaching on the 4 themes of Effectively Designed Instruction (EDI); The 4 themes are: Build Interactions, Design Experiences, Present Content, and Accessibility and Inclusion; Goal of EDI coaching is to personalize student learning and cater to diverse student needs across all course modalities
Pricing: Pricing per cohort is \$54,600

Lempp Educational Consulting, LLC

Company Name: Lempp Educational Consulting, LLC
Street Address: 6208 Marilyn Drive
City, State, Zip: Alexandria, VA 22310
Contact Name: Jennifer Lempp
Contact Phone Number: 703-919-6836
Contact Email Address: Jennifer.Lempp@mathworkshop.net
Category of Service Provided: Academic Educational Consultant
Target Audience: Teachers, Administrators, District Leaders

Description of Services:	Professional development: large scale or job-embedded school improvement, consulting around math goals, coaching and consulting in classrooms
Pricing:	\$4000 per day plus travel expenses; multi-day booking discount offered to school Districts scheduling more than one day; Discount to \$3500 per day; virtual sessions available; sessions under 3 hours discounted to \$3000

Mathematically Minded LLC

Company Name:	Mathematically Minded
Street Address:	220 Boulder Drive
City, State, Zip:	Orofino, ID 83544
Contact Name:	Christina Tondevoid, Owner
Contact Phone Number:	208-278-2833
Contact Email Address:	info@buildmathminds.com
Category of Service Provided:	Professional/Staff Development Training
Target Audience:	Classroom Teacher, Curriculum Coordinator, and Math Coach
Description of Services:	Online professional development
Pricing:	\$297 per 3 month course; \$648 per 1 Year course.

Misty Gammel

Company Name:	Misty Gammel
Street Address:	100 Patriot Court
City, State, Zip:	Hewitt, TX 76643
Contact Name:	Misty Gammel
Contact Phone Number:	254-855-5287
Contact Email Address:	mgammel@cityofhewitt.com
Category of Service Provided:	Professional/Staff Development Training
Target Audience:	Employees with access to TCIC/TLETS
Description of Services:	Training for TCIC/TLETS Mobile Access
Pricing:	\$35 per hour of instruction

MY GOODNESS GAMES DBA GAMES2U (Games2U)

Company Name:	Games2u
Street Address:	2219 Westlake Dr
City, State, Zip:	Austin, TX 78746
Contact Name:	Christina Urias
Contact Phone Number:	800-714-2637
Contact Email Address:	games2udtx@g2u.com
Category of Service Provided:	Other applicable service
Target Audience:	Field Day for Students
Description of Services:	Video Game Van and Booger Wars Battle
Pricing:	\$2200 for both activities for five hours

Pixster Photo Booth

Company Name: Pixster Photobooth, LLC
Street Address: 2665 Ariane Dr, Suite 208
City, State, Zip: San Diego, CA 92117
Contact Name: Dave Cuttell
Contact Phone Number: 888-668-5524
Contact Email Address: dave@pixsterphotobooth.com
Category of Service Provided: Other applicable service
Target Audience: Waco ISD Event Attendees - Students and/or Staff
Description of Services: photo booth rentals
Pricing: We have several pre-set packages available starting at \$595: Baseline price for all rentals; Additional costs for extra rental hours or services

Quail Creek K-9 Services

Company Name: Quail Creek Canines
Street Address: 253 Hillside Dr
City, State, Zip: Robinson, TX 76706
Contact Name: Regina Bujalski
Contact Phone Number: 254-754-2652
Contact Email Address: gbujalski@hotmail.com
Category of Service Provided: Other applicable service
Target Audience: Students
Description of Services: Teaching students to be Junior Animal Handlers for Alliance of Therapy Dogs
Pricing: \$90/hour

Rhondal Napier

Company Name: Rhondal
Street Address: 1515 Barron Avenue
City, State, Zip: Waco, Texas, 76707
Contact Name: Rhondal Napier
Contact Phone Number: 254-349-1296
Contact Email Address: Nape33.254@gmail.com
Category of Service Provided: Other applicable service
Target Audience: Children middle school age
Description of Services: Creating a banner using paint and mixed media
Pricing: \$1000 for the full duration of time

The Brick Truck (Estate Scapes)

Company Name: The Brick Truck
Street Address: 2033 Finch Road
City, State, Zip: Gilmer, Texas 75645 546
Contact Name: Kennedy Bounds

Contact Phone Number:	903-557-1196
Contact Email Address:	play@thebricktruck.com
Category of Service Provided:	Educational Activity Provider for Students
Target Audience:	Students between the ages of 5 and 18
Description of Services:	Interactive educational play experience with over 50,000 Lego bricks and mini-figures; Experiences can be customized to fit curriculum themes; The Brick Truck comes on site to you
Pricing:	Quotes will be provided based on specific dates, number of participants, and hours of play

Timothy Nutting

Company Name:	Timothy Nutting
Street Address:	3602 NORTH PARK DRIVE
City, State, Zip:	Corsicana TX 75110
Contact Name:	Timothy Nutting
Contact Phone Number:	903-467-8227
Contact Email Address:	timothywnutting@gmail.com
Category of Service Provided:	Academic Educational Consultant
Target Audience:	University HS Band
Description of Services:	Drill writing and show design for band
Pricing:	Fees based on service provided

True Colors International Inc.

Company Name:	True Colors International Inc.
Street Address:	2770 S Harbor Blvd, Suite E
City, State, Zip:	Santa Ana, CA 92704
Contact Name:	Lisa Cline
Contact Phone Number:	714-716-1553
Contact Email Address:	lcline@truecolorsintl.com
Category of Service Provided:	Professional/Staff Development Training
Target Audience:	Staff, Teachers, and Office Personnel
Description of Services:	In this interactive learning experience, groups of 30-60 individuals will learn about themselves and others by expanding and applying knowledge of their personal True Colors spectrum into activities to clarify and validate their values, joys, stressors, and frustrations of the workplace and daily life.
Pricing:	True Colors training sessions pricing structure is set by workshop fee and per participant cost; fees include materials and supplies and facilitator/consultant training fee; Facilitator/Consultant expenses for travel is calculated by the U.S. General Services Administration per diem and mileage rates as set for the continental United States

Waco Independent School District

Board of Trustee Meeting Agenda Item

Date: June 29, 2023

Contact Person: M. Tish/G. Barrera

RE: Bid Award for Maintenance Supplies, Equipment, and Services

Background Information:

Request for Proposal, RFP # 22-1229, Maintenance Supplies, Equipment, and Services have been received for the purpose of creating a list of vendors which can provide supplies, equipment, and services for the Facilities and Maintenance and Custodial Departments. We have received ninety-seven (97) responses for this initial bid. We received two (2) additional vendor this past month which is attached for your consideration.

In an effort to allow for maximum participation with our Maintenance and Custodial vendors and in light of changes made in 2019 by the Texas Education Agency's, Financial Accountability Systems Resource Guide (FASRG) Module 5 Purchasing, the Business Services Department has elected to utilize the Extended Period for Multiple Award Contracts as shown in the FASRG excerpt shows.

3.16.6 Limited Response Period versus Extended Period for Multiple Award Contracts

Normal procurement practices will allow solicitation responses to be submitted to the district within a limited, specific time period, usually two to three weeks. The district may want to review past policies to determine if a limited response time is in the best interest of the district and the needs of its end users.

Consideration may need to be given to have an extended opening for receiving responses.

- **Limited Response Period.** This choice is considered a normal, formal RFP. Examples include newspaper advertisements and awards made and limited to only the responders that submitted and awarded for the solicitation.

- **Extended Response Period.** This choice is more informal than a limited response period. The major difference is the date the responses are due. This method allows for responses to be accepted throughout an extended period such as the date of the contract award expiration and awards made periodically. Periodic board approval may also be required. For newspaper advertisements, our District will continue to publicize periodic republication through our website and continue to enlist the assistance of the three (3) Chamber of Commerce's, as received on this first solicitation. The advertisement will address concerns about transparency by announcing the solicitation to new readers even though the statutory requirements were met by the initial publication.

The intent for awarding additional vendors to this bid will be done on an as needed basis. Vendors submitting a response by the end of each month will be submitted for consideration at the next board meeting.

Fiscal Implications:

The cost of these items will be charged to the appropriate campus/department budget.

Administrative Recommendation(s):

The Administration recommends that the Board of Trustees approve the additional new vendors for the Maintenance Supplies, Equipment, and Services bid, as presented.

RFP # 22-1229
Maintenance Supplies, Equipment and Services
Vendors for June 2023

Responding Supplier	City	State
Hill Country Paints (Wendy Hui Anderson	Waco	TX
Resco (E & O investments, LLC)	Hewitt	TX
Previously Awarded Vendors	City	State
A&H Refrigeration Co. Inc.	Waco	TX
A-1 Banner & Sign Co. Inc.	Waco	TX
A-1 Vacuum Center, Inc.	Conroe	TX
AAA Elevator Inspections	Austin	TX
Access Lift & Service Company, Inc.	Peaster	TX
Acme Architectural Hardware	College Station	TX
Air Flow Filter Service, Ltd	Waco	TX
Allen Glass Company	Hewitt	TX
ARC Abatement 1, Ltd.	Waco	TX
Arrow Magnolia International, Inc.	Dallas	TX
B F Hurley Mat Co, Inc.	LaGrange	GA
B&B Repair Shop	West	TX
Bain Paper Company	Waco	TX
Barnett Contracting, Inc.	Waco	TX
Batteries Plus Waco/Temple/Harker Heights (Glacierbeach)	Waco	TX
Belfor (Belfor USA Group, Inc.)	Waco	TX
Benchmark Signs	Weatherford	TX
Bill's Discount Tire Service (Maria G. Castanon-Vega)	Waco	TX
Bleacher Service Company (Gilbert D. Trevino)	Moody	TX
Brandt (The Brandt Companies, LLC.)	Waco	TX
Brem's Fencing LLC	Valley Mills	TX
Brewer Lock and Safe	Waco	TX
BUGSDOTCOM Termite and Pest	Waco	TX
Bullseye Glass (Bullseye Glass LLC,)	Waco	TX
Centex Carpet & Interiors	Waco	TX
CF SUPPLY INC	Waco	TX
Clarks Small Engine Repair	Lacy Lakeview	TX
Climatec, LLC	Austin	TX
Code-3 Fire & Safety Products	Waco	TX
Communication Concepts	Fort Worth	TX
Competitive Choice Inc.	Houston	TX
Complete Supply, Inc.	Dallas	TX
Core Controls	Dallas	TX
Dealers Electrical Supply	Waco	TX
DenaliCS (Denali Construction Services, LP)	Carrollton	TX
Dent Enterprises LLC	Desoto	TX
Diesel Power Supply Co.	Waco	TX
Encore Fence	Temple	TX
Environmental Concerns, Inc.	Waco	TX
EPIC SOLAR CONTROL, LLC	McKinney	TX
Fairway Supply	Irving	TX

RFP # 22-1229
Maintenance Supplies, Equipment and Services
Vendors for June 2023

A&H Refrigeration Co. Inc.	Waco	TX
Firetrol Protection Systems (Heather Foster)	Austin	TX
Fissco Supply (FRIGELAR NORTH AMERICA DBA Fissco Supply)	Dallas	TX
Fitzgerald Lawnscape Ltd.	Woodway	TX
Fort Worth Window Cleaning, Inc.	Haltom City	TX
Fred's Power Wash (Washer Power)	Waco	TX
Gene Ives Acoustic & Tile Co.	Waco	TX
Global Industrial (Global Equipment Co., Inc.)	Buford	GA
Grones Environmental Services	Waco	TX
H. B. Blake Company	Hewitt	TX
HCS Inc. (MB Home Construction)	Waco	TX
Image Maker 4U, Inc.	Hughes Springs	TX
Independent Hardware Inc.	Philadelphia	PA
Interboro Packaging Corporation	Montgomery	NY
Intercon Environmental, Inc.	Mansfield	TX
intermountain lock & security supply	Salt Lake City	UT
J.K. Brown	Moody	TX
Justin Seed Company	Justin	TX
Landscape Supply (Waco Landscape Supply, LP)	Waco	TX
Lennox Industries (Lennox Industries Inc.)	Richardson	TX
Liftcrete Solutions (Green Foam Solutions, Inc.)	Waco	TX
Lonestar Chiller Systems (Lonestar Chiller Systems LLC)	Crawford	TX
Loop 340 Overhead Door (Sideline Enterprises, Inc.)	Waco	TX
Ludwig Saw AND Tool Sharpening	Waco	TX
M.A.N.S Distributors Inc.	Carrollton	TX
Marks Plumbing Parts (John W Gasparini Inc.)	Fort Worth	TX
Morrison Supply Co.	Waco	TX
National Wholesale Supply Co.	Woodway	TX
P&E Mechanical Contractors, LLC	Waco	TX
Patriot Supply Company	Brady	TX
Perry Office Plus (Perry Office Products)	Temple	TX
Pye Barker Fire	Waco	TX
RBO Technologies, LLC	Waco	TX
Richards Equipment Company	Waco	TX
Rybert Plumbing LLC	Waco	TX
Share Corporation	Milwaukee	WI
Sherwin Williams (The Sherwin Williams Company)	Waco	TX
Shiffler Equipment Sales, Inc.	Chardon	OH
Sims Plastics of Waco	Waco	TX
Smoot-Anderson Co., Inc.	Waco	TX
Solar Supply	Waco	TX
Southern Clean Pressure Washing (Michael Jackson)	Ferris	TX
Southwest Maintenance, LTD	Waco	TX
Starks Janitorial Services	Mesquite	TX
Sunrise Environmental LLC (Jessica L Marquesen)	Bridgeport	TX

RFP # 22-1229
Maintenance Supplies, Equipment and Services
Vendors for June 2023

A&H Refrigeration Co. Inc.	Waco	TX
SWS Concrete Contractor (SCOTT W SCHREIBER)	Waco	TX
T&G Chemical and Supply	Waco	TX
T.E.A.M. Solutions, Inc. (Texas Energy & Automation Management Solutions)	Waco	TX
TJ's Professional Painting and Construction, LLC	Red Oak	TX
Trane	Fort Worth	TX
UniFirst Corporation	Hewitt	TX
United Refrigeration Inc.	Waco	TX
Virkim Inc.	Hewitt	TX
Waco Lock and Key, LLC	Waco	TX
WESCO Chemicals, Inc.	Waxahachie	TX
Winston Watercooler of Waco LTD	Waco	TX
Woodard Builders Supply Company	Fort Worth	TX

Waco Independent School District

Board of Trustee Meeting Agenda Item

Date: June 29, 2023

Contact Person: M. Tish/A. Villanueva

RE: Bid Renewal for Auctioneer Services

=====

Background Information:

Requests for Proposals, bid # 21-1187, have previously been issued for the purpose of awarding a contract to provide auctioneer services for the District. We received two (2) responses for this bid. After the evaluation process was complete, the Maintenance and Facilities Department recommended Clark Auction Company as the company which offers the best value to the District.

The District has been pleased with the services we have received from Clark Auction Company and would like to exercise our option to renew this contract for an additional one (1) year period. This continued relationship is agreeable with Clark Auction Company, as well.

The pricing worksheet is attached for your review.

This bid will expire June 30, 2023, with two (2) additional one (1) year renewal options, if mutually agreeable between both parties.

Fiscal Implications:

The cost of these services will be deducted from auction proceeds.

Administrative Recommendation(s):

The Administration recommends that the Board of Trustees award the contract renewal for Auctioneer Services to Clark Auction Company, as presented.

RFP # 21-1187
Auctioneer Services
Pricing Worksheet

CLARK AUCTION COMPANY, LLC

What percent of gross sales will you charge the school district for conducting the auction?	7%
Will you charge us for advertising and other expenses on top of the above %? ____Yes or ____No	NO
If yes, please list expense types	
What is the buyer's premium that you will charge the purchasers on top of what they bid?	10%
Will you charge the bidders a registration fee or deposit on the day of the auction prior to allow them to bid on items? ____Yes or ____No	NO
If yes, please explain	
On top of the % that you will charge the district based on gross sales, is there any other type of flat fee that you will charge the district?	NO

GARNER & ASSOCIATES, AUCTIONEERS

What percent of gross sales will you charge the school district for conducting the auction?	18%
Will you charge us for advertising and other expenses on top of the above %? ____Yes or ____No	NO
If yes, please list expense types	
Actual cost of advertising will be deducted from auction proceeds. Setup, organization, clerking, bookkeeping, security, ring personnel, auctioneers and catalog preparation is included at no additional cost	
What is the buyer's premium that you will charge the purchasers on top of what they bid?	12%
Will you charge the bidders a registration fee or deposit on the day of the auction prior to allow them to bid on items? ____Yes or ____No	NO
If yes, please explain	
On top of the % that you will charge the district based on gross sales, is there any other type of flat fee that you will charge the district?	NO

Waco Independent School District

Board of Trustee Meeting Agenda Item

Date: June 29, 2023

Contact Person: M. Tish/C. Reece

RE: Bid Renewal for Courier Services

=====

Background Information:

Request for Proposal, RFP # 22-1227, for Courier Services has been issued and opened for the purpose of awarding services to a vendor which could provide courier services for the District. The scope for these services requires daily cash deposit pickups at each of the campus offices as well as the cafeteria/kitchen areas, then delivering those deposits to the District's banking institution. In addition to the campus pick up service, the courier services also provide pick up service for both the Child Nutrition Department and the Administration Building.

The District has been pleased with services in which they have received from Texas Star Security and would like to exercise our option to renew the contract for an additional one (1) year period. This is agreeable with Texas Star Security.

This bid will expire July 31, 2024 with two (2) additional renewal options

Fiscal Implications:

The cost of this service will be charged to the appropriate contracted services budget.

Administrative Recommendation(s):

The Administration recommends that the Board of Trustees approve the bid renewal for Courier Services with Texas Star Security, as presented.

RFP # 22-1227
Courier Services
Bid Tabulation

2022-2023 School Year

Responding Supplier	City	State	Lines Responded	Cost Per Pickup	Annual Total
Texas Star Security (Tex 1 Security, Inc.)	Waco	TX	25 Pickup Locations X 170 days = 4250 pick-ups	\$10.00	\$ 42,500.00

Waco Independent School District

Board of Trustee Meeting Agenda Item

Date: June 29,2023

Contact Person: M. Tish/D. Williams

RE: Bid Renewal for Security Patrol Services

=====

Background Information:

Request for Proposal, RFP # 22-1228, Security Patrol Services, has been issued and opened for the purpose of awarding services to a company which can provide Security Patrol Services to include nights, weekends and holidays for the District.

After the Police Department evaluated the proposals, it was determined that Texas Star Security offered the best value to the District. Blue Shield Security & Protection was the low bidder; however, they did not list any School District experience. This was a great concern for the Police Department and therefore recommended Texas Star Security. Texas Star Security has experience with other School Districts including Waco ISD.

The Police Department has been pleased with the services in which they have received from Texas Star Security and would like to exercise their option to renew the contract for an additional one (1) year period. This renewal is agreeable with Texas Star Security

This bid will expire August 31, 2022 with two (2) additional one (1) year renewal options.

Fiscal Implications:

The cost of this service will be charged to the appropriate contracted services budget.

Administrative Recommendation(s):

The Administration recommends that the Board of Trustees approve the bid renewal for Security Patrol Services to Texas Star Security, as presented.

Security Patrol Services

Bid Tabulation

RFP # 22-1228

Responding Supplier	City	State	Response Total
Blue Shield Security & Protection Inc.	Dallas	TX	\$87,599.00
Texas Star Security (Tex 1 Security, Inc.)	Waco	TX	\$123,470.00
Jet Security	Houston	TX	\$135,537.00
Controlled F.O.R.C.E., Inc.	San Antonio	TX	\$440,530.98
Signal 88 Security (Signal 88 Holdings, LLC)	Waco	TX	\$923,136.00
The Unit Staffing LLC	Perryton	TX	\$3,348,550.00

Waco Independent School District

Board of Trustee Meeting Agenda Item

Date: June 29, 2023

Contact Person: S. Smith/ G. James

RE: 2023-2024 Memorandum of Understanding with EOAC Head Start

=====

Background Information:

The Waco Independent School District (Waco ISD) has had a collaborative partnership with the Economic Opportunities Advancement Corporation (EOAC) Head Start for over eighteen years. The purpose of this memorandum of understanding (MOU) is to continue to provide comprehensive early childhood education, health, nutrition, and parental involvement services to low-income children and families through the Jump Start preschool program at South Waco and West Avenue Elementaries.

Services and resources designed to foster stable family relationships, enhance children's physical and emotional well-being, and establish an environment to develop strong cognitive skills will be provided in four classrooms total, two on each campus. Enrollment will include a maximum of no more than 20 children per classroom and the schedule will follow the district-adopted school calendar.

Fiscal Implications:

Waco ISD's in-kind contribution, including salaries and benefits for teachers assigned to the four Jump Start classrooms, are included in the 2023-2024 budget.

Administrative Recommendation(s):

The Administration recommends that the Board of Trustees approve the MOU between Waco ISD and EOAC, as presented.

**WACO INDEPENDENT SCHOOL DISTRICT
AND
EOAC HEAD START
MEMORANDUM OF UNDERSTANDING
2023-2024**

This Memorandum of Understanding (MOU) is made and effective on August 1, 2023, by and between the Waco Independent School District, a legally constituted Independent School District located in McLennan County, Texas (hereafter referred to as "Waco ISD"), located at 501 Franklin Avenue, Waco, Texas and EOAC (the grantee and administrators of the Head Start program in McLennan County, which is a federally funded early childhood program) (hereafter referred to as "EOAC Head Start"), located at 500 Franklin Avenue, Waco, Texas.

I. Purpose of Memorandum of Understanding

The purpose of this MOU is to establish the best possible cooperative method of providing high-quality school readiness services to local preschool children and their families, including the transition to kindergarten, and to establish working procedures in the provision of services to preschool children eligible for special education in compliance with Federal and Texas State law and regulations.

This collaborative preschool program will hereafter be known as "Jump Start." The program will be offered at the campuses shown in "Attachment A."

It is the intent of this agreement to:

- A. Define the services to be provided by each agency.
- B. Ensure that eligible children receive high-quality, appropriate preschool services.
- C. Ensure that each agency communicates with the other and shares leadership responsibilities so available resources to be utilized most effectively.
- D. Ensure that children eligible for preschool and special education services receive free and appropriate public education in the least restrictive environment, as the law requires.
- E. Provide services to preschool children with disabilities on a mandatory basis, including comprehensive evaluations of children with suspected disabilities by appropriate personnel using appropriate instruments.
- F. Ensures that this cooperative arrangement between Waco ISD and EOAC Head Start is developed, implemented, and reviewed at least annually.

II. Description of Program

Collaborative Head Start/ISD Pre-k classrooms will serve four-year-old children who meet eligibility regulations for pre-k Enrollment of Texas Education Agency and the enrollment guidelines for Head Start programs. The children will be served on two campuses in 4 classrooms (see "Attachment A"). enrollment will include a maximum of 20 children per classroom. This collaboration will follow the district-adopted school calendar year.

This collaboration will include eligible children who may receive PPCD special education services in a self-contained Jump Start or Head Start classroom for dual enrollment opportunities.

Provide preschool children with disabilities a free and appropriate public education (FAPE), including the development and implementation of an Individualized Education Plan (IEP)

or Individualized Family Service Plan (IFSP), which includes all the components of an IEP, procedural safeguards, and the provision of related services.

III. Agency Responsibilities

A. Responsibilities of Waco ISD

- i. Must recruit, enroll, and serve eligible preschool children (four-year-olds) for the collaborative classrooms, per state and local pre-kindergarten regulations and Head Start eligibility guidelines. Children enrolled must meet the criteria of both programs. Serving these children will include provisions of state and local pre-k curriculum materials, developmentally appropriate materials and supplies, and other components typically occurring in public pre-k classrooms in Waco ISD.
- ii. Assist in recruiting, enrolling, and serving children with disabilities who are eligible to participate, as identified by the LEA. (Economic Opportunity Act PL92-424).
- iii. Provide classroom space (per the attached list) for the collaborative classrooms on the campuses named in the list, along with the usual and customary usage of the accompanying facilities such as a library, gym, and playground. Classroom space and associated utilities are considered in-kind to the Head Start program with a monthly rental valuation of facility use as identified in the appraisal document on file at the EOAC Central Office.
- iv. Provide food services for enrolled students during the adopted school calendar year. Food services will be accomplished through "family style" dining (Head Start will provide any additional utensils or equipment necessary to undertake that style of food service).
- v. Provide a daily three-hour period of pre-k instruction based on the Texas Education Agency Pre-kindergarten Guidelines for all enrolled students. A teacher who meets Texas Education Agency early childhood certification requirements will deliver classroom instruction. The teacher will be a Waco ISD employee funded by Waco ISD. A Waco ISD administrator (principal) will supervise and evaluate the teacher.
- vi. Provide for common planning time by Waco ISD pre-k teachers and EOAC Head Start teachers each day, before or at the end of the instructional day.
- vii. Salaries and fringe benefits of Waco ISD teachers will be considered an in-kind donation to the Head Start program at the starting rate for certified teachers and supporting staff.
- viii. Provide student testing and evaluation and collaborative program evaluation deemed necessary to fulfill school district requirements. Analysis of evaluation will be shared by both agencies as may be pertinent.
- ix. Assist in delivering collaborative staff development for Waco ISD and Head Start staff involved in the collaborative project.
- x. Ensure that campus health staff is available to children participating in Jump Start

classrooms on campuses. Provide for the state of Texas annual requirements for vision and hearing screening and report such to the state.

- xi. Provide office space and access to and use of a telephone for Head Start Child and Family Advocate.
- xii. Provide a substitute when a Waco ISD employee is absent from duty contingent on the availability of Waco ISD substitutes on the given day.
- xiii. Provide a designated person to coordinate efforts between Waco ISD and Head Start.
- xiv. Include Head Start in the child find plan under part B of the Individuals with Disabilities Education Act (IDEA) for evaluation purposes. If children are identified and services are recommended, the family will have options of enrolling in Waco ISD to receive their services through the district, dual Enrollment in Waco ISD and Head Start, or receiving services through proportionate share funds until funds are depleted at Head Start. Services will only be provided through IDEA-B if children are dually enrolled.
- xv. Inform Head Start of the appropriate local referral procedures and referral information required by Waco ISD.
- xvi. Identify district staff responsible for accepting and processing the referral of students from Head Start.
- xvii. Report referral and assessment process results to Head Start with the parent's written consent.
- xviii. Assure that whenever appropriate, the IEP will include instructions for parents(s)/guardians(s) to assist in accomplishing the goals and objectives of the IEP.
- xix. Assure that procedural safeguards and confidentiality of information are provided to eligible children and their parents.
- xx. Facilitate the transition of eligible children into Waco ISD.
- xxi. Assessment
 - a. Individuals with exceptional needs assessed for special education services shall benefit from a multi-disciplinary team. No single procedure shall be used as a sole criterion for assessment.
 - b. The District shall ensure that a full and individual evaluation is conducted for each child being considered for special education and related services under Part B of IDEA (1). The evaluation is completed per the procedures described in 300.560-300.535. (2) The results of the evaluation are used by the child's IEP team to meet the requirements of 300.340-300.350

- c. Parents shall receive five business days' notice of an IEP meeting to ensure an opportunity to attend and for Head Start to help with transportation if necessary.
- d. The meeting notice shall also identify any local agency that shall be invited to send a representative. The EOAC Head Start program is here noted to be acknowledged as the other local agency.

(See "Attachment B" for disability service implementation)

B. Responsibilities of EOAC Head Start

- i. Assist in recruiting, enrolling, and serving eligible preschool children (four- year-olds) for the collaborative classrooms, per state and local pre-kindergarten regulations and Head Start eligibility guidelines. Serving these children will include provisions of the curriculum materials (including any mandated by Head Start Performance Standards), developmentally appropriate materials and supplies, and other components typically occurring in Head Start classrooms in McLennan County.
- ii. EOAC Head Start will reimburse Waco ISD for food services for enrolled students and adult meals consumed and the difference between the current "free" rate and the current "reduced and paid" rate as applicable for each day of service.
- iii. Support and implement the existing state and district medical policies of Waco ISD.
- iv. Provide at least six hours of classroom services for enrolled students.
- v. For each collaboration classroom, provide one Head Start teacher and one teacher aide who will meet the Office of Head Start educational requirements. The Teacher Aide will assist the teachers in the classrooms. EOAC will employ, fund, supervise, and evaluate these staff.
- vi. Provide one part-time Relief staff to provide breaks for Head Start staff who will be employed, funded, supervised, and evaluated by EOAC.
- vii. Ensure that Head Start staff co-teaches with Waco ISD staff members assigned to the classroom, taking equal responsibility for lesson plans, daily preparation, and student instruction.
- viii. Provide the necessary paperwork for EOAC Head Start staff to comply with Waco ISD's requirements (i.e., criminal background check results, TB test results, CPR certification). EOAC Head Start must register with the Texas DPS Criminal History Clearinghouse and have all employees working at the Waco ISD campus to have passed the fingerprint-based applicant clearinghouse of Texas (FACT).
- ix. Provide student testing and evaluation, and collaborative program evaluations, deemed necessary to fulfill EOAC/Head Start requirements. Analysis of the collaborative program evaluation will be shared by both agencies.

- x. Provide or make available to participating children and their families support services that would be available for eligible students in a Head Start Center.
- xi. Provide a designated person to coordinate efforts between Waco ISD and Head Start.
- xii. Provide confidentiality of the identity of students with disabilities enrolled in the collaborative program.
- xiii. Follow the dress code policy of Waco ISD.
- xiv. Provide a substitute when a Head Start employee is absent from duty contingent on the availability of Head Start substitutes on the given day and notify the WISD campus principal if problems arise in finding a substitute.
- xv. As needed, supplement materials and supplies to accommodate the classroom setting.
- xvi. Provide parent training, training information, and parent activities.
- xvii. Ensure that only children residing within the Waco ISD boundaries are served in the collaborative classrooms.
- xviii. Ensure discussion between collaborative campuses before a student is transferred.
- xix. Recruit and identify children to participate in dual Enrollment from Waco ISD ECSE (Early Childhood Special Education) per TEA.
- xx. Participate in the District child find plan under Part B of IDEA through monthly transition meetings with the Preschool Assessment team.
- xxi. Screen all children within the first 45 days of enrollment and refer those suspected to need special education and related services to the district for assessment.
- xxii. Refer children suspected of having a disability to the child's School District for evaluation (1302.33 (3)(i))
- xxiii. Ensure completion of health screening/assessment (medical, dental, nutritional, and developmental) not performed by the local education agency as part of the evaluation for determining if a disability is present.
- xxiv. Collaborate with the local education agency in the multi-disciplinary evaluation, implementing the portions of the IEP identified for the Head Start Program to assist in or follow through on activities to support the achievement of the child's IEP goals and objectives, the IEP annual review, and the transition process.
- xxv. Ensure that procedural safeguards, including confidentiality of records, are provided for all children with disabilities and their parents.

- xxvi. Offer a support system for families of children with disabilities through training, information, and social support to enable parents to advocate for their child.
- xxvii. Provide information on special education and the referral process to all families with a child suspected to have a disability. This is done throughout the year in Head Start child recruitment efforts and meetings.

(See "Attachment B" for disability service implementation)

IV. Confidentiality

EOAC Head Start and Waco ISD may review the enrollment data on current and previously enrolled students to verify those students' participation in the collaborative program. In rendering performance, EOAC Head Start and Waco ISD will ensure compliance with all applicable statutory requirements relating to the confidentiality of education records outlined in the Family Education Rights and Privacy Act (FERPA), 20 U.S.C. § 1232g, et. seq. EOAC Head Start and Waco ISD will have a system in effect to protect student records maintained in connection with the services provided according to this agreement. EOAC Head Start and Waco ISD will not transfer or disclose any identifiable student education records to any third party or entity without the express written consent of someone authorized to act on behalf of the student. The Waco ISD may require EOAC Head Start to transfer a student record to another agency if the transfer is necessary to protect the record's confidentiality or the student's health or welfare. EOAC Head Start and Waco ISD understand and agree that no confidential information will be disclosed in any document intended for public disclosure.

V. Collaboration Efforts

- A. EOAC Head Start and Waco ISD will utilize a weekly planning time for lesson plan development and preparation. The EOAC Head Start teacher aide will assist with classroom coverage during planning. Lesson plans and supply lists will be provided to the Head Start Education Manager weekly.
- B. Staff training will be determined and coordinated by the Head Start Education Manager and the responsible Waco ISD personnel based on needs assessments completed by EOAC Head Start staff and Waco ISD collaborative staff.
- C. Meetings between Head Start administrators and district administrators will be held per the schedule in "Appendix A." Efforts will be made to provide a joint planning and meeting time to Waco ISD and Head Start teachers before the first day of school in August 2023.
- D. Waco ISD teachers and principals will be invited to all Head Start staff meetings related to this collaboration.
- E. Head Start teachers and administrative staff will be invited to all Waco ISD meetings related to this collaboration.
- F. Head Start will provide all Head Start support services for children enrolled in this

collaborative.

- G. Waco ISD will provide breakfast and lunch to all students who qualify.
- H. Head Start will provide tables, chairs, and serving dishes to accommodate family-style meal service if needed.
- I. Head Start will provide a snack for all students in this collaborative if not provided by the district.
- J. Waco ISD will distribute and maintain all forms and records needed for the USDA School Lunch Program.
- K. Head Start will purchase meals for Head Start staff from Waco ISD.
- L. Head Start will provide an Education Manager and Mentor Coach who will observe classrooms 3 times per year. The agency will also support the collaborative classrooms by making available the EOAC Head Start Special Services Manager, Nutrition Manager, Child Outcomes Coordinator, Health Manager, Parent, Family & Community Engagement Senior Manager, and ERSEA Manager. Pertinent information will be shared with the Head Start Associate Director and Principal.
- M. Head Start will comply with screening, identification, and services for children with disabilities per Waco ISD guidelines.
- N. Per IDEA, Waco ISD will provide special education services to all children with Individual Education Plans (IEP) as determined by the district.
- O. Waco ISD will provide space for family-style meal services if needed.
- P. The Waco ISD school nurse will provide student services as needed.
- Q. Head Start will provide for the cost of two class field trips per year per classroom.
- R. Document parent and community in-kind services to support Head Start's non-federal share requirement.
- S. Head Start will work with Waco ISD to comply with screening, identification, and services for children whose Home Language Survey indicates that the home language is other than English.

VI. Physical Environment

- A. The Waco ISD and Head Start teachers will work together to set up the classroom environment.
- B. Head Start and Waco ISD will provide classroom furniture and equipment for classrooms.
- C. Waco ISD will provide Head Start teachers access to the laminator and die-cut machine.

- D. Waco ISD will provide custodial services. Head Start will support custodial supplies for Jumpstart classrooms.

VII. Registration, Enrollment, Transition

- A. Waco ISD and Head Start will coordinate to provide joint Pre-K and Head Start registration and transition. Waco ISD/Head Start will collaborate with sharing enrollment information on all children prior to the child's first day in attendance.
- B. Waco ISD will publicize pre-k through public notices in English and Spanish per TEC 29.153, (e), page 192.
- C. Waco ISD will provide pre-kindergarten registration online for all children, including those in Jumpstart classrooms.
- D. Students will be screened as they enroll throughout the school year. Under the following circumstances, they will be enrolled in Head Start:
 - i. the child qualifies by age
 - ii. the family qualifies by income
 - iii. there is space in one of the collaborative classrooms
 - iv. the family chooses to participate
- E. Head Start will collaborate with the school district to keep and maintain all student immunizations current or up-to-date.
- F. Waco ISD and Head Start will work together to meet the target attendance level for the collaborative classrooms of at least 95% each day.
- G. Waco ISD and EOAC Head Start will work collaboratively to actively recruit and enroll children with disabilities to meet the 10 percent disability enrollment requirement for Head Start.
- H. Waco ISD will share educational data Pre-K through at least 3rd grade at aggregate and/or individual levels as appropriate to ensure program impact is measured and tracked.

VIII. Communication with Parents and Parent Involvement

- A. Head Start staff receiving parent concerns, compliments, and complaints will follow the district's policy and the Head Start complaint procedure.
- B. Head Start Child and Family Advocate will contact families of students who are absent for 2 or more days by making a home visit.
- C. Head Start teachers will conduct two family home visits and two parent conferences each year.
- D. Head Start Child and Family Advocate will plan at least five parent meetings per school year.

IX. Management of Collaboration

- A. Head Start and Waco ISD administrators will meet per the schedule in "Appendix A."
- B. Waco ISD and Head Start will provide general liability insurance for all pre-k children enrolled in this collaborative.
- C. Waco ISD and Head Start will observe a communication/problem-solving protocol.
- D. Head Start will provide a designated person to coordinate efforts between Waco ISD Principals and Head Start campus-assigned staff.

X. Notices

All notices required or permitted under this agreement may be given to a party personally or by mail, addressed to such party at the address stated below or to such other address as one party may notify the other in writing from time to time. Any notice given shall be deemed received when deposited in the United States mail addressed with postage prepaid.

XI. Terms/Termination

This agreement will be for one (1) year, August 1, 2023, through May 31, 2024, unless earlier terminated as provided herein. At the end of each year, the agreement may be renewed for an additional term to be determined by the agreement of both parties. Termination of this agreement may be made by either party should funding cease. Such termination will be in writing with sixty (60) days' notice.

XII. Supplements, Modification, or Waivers

Any supplement, modification, or waiver of any provision of this agreement must be in writing and signed by authorized representatives of both parties.

XIII. Miscellaneous Provisions

- A. This agreement shall not create a principal-agent relationship, partnership, or joint venture. Each party shall retain control over its own employees and agents.
- B. Due to entering this agreement, no party waives or relinquishes any immunity or defense on behalf of itself, its agents, trustees, officers, or employees.
- C. This agreement shall not benefit or obligate any person or entity, not a party.
- D. The parties shall cooperate fully in opposing any attempt by any third party to claim any benefit, protection, or other consideration under this agreement.
- E. Any notice required under this agreement must be in writing and directed to the following persons.

Waco Independent School District

Contact Person:
Dr. Deena Cornblum, Assistant Superintendent of Curriculum and Instruction
Waco ISD Administration Bldg.
501 Franklin Avenue
Waco, TX 76703

Person Responsible for Implementing Agreement:
Sherry Smith, Director of Purchasing
501 Franklin Avenue
Waco, TX 76703

EOAC Head Start

Contact Person:
Susanne S. Wilson, Director EOAC Head Start
500 Franklin Avenue
Waco, TX 76701

Person Responsible for Implementing Agreement:
Robert Kunze, Interim Executive Director EOAC
500 Franklin Avenue
Waco, TX 76701

- Either party may not assign this Agreement without the prior written consent of the other party.
- Both parties agree to abide by the rules and regulations or standards of law and regulatory agencies.

The Waco Independent School District and the EOAC Head Start program agree to enter into the collaborative preschool agreement outlined above in this MOU.

Deena Cornblum Assistant Superintendent of Curriculum and Instruction-Waco ISD	Date
Dr. Susan Kincannon Superintendent of Schools-Waco ISD	Date
Robert Kunze EOAC Interim Executive Director	Date
Susanne S. Wilson EOAC Head Start Director	Date

ATTACHMENT A**COLLABORATIVE CAMPUS 2023-2024**

West Avenue 2 Classrooms

South Waco Elem. 2 Classrooms

COMMUNICATION/MEETINGS

Regular communication between EOAC and Waco ISD will be implemented.

Meetings will be scheduled with Head Start and Pre-K to train and inform all persons working with the Jump Start collaboration as needed but at least quarterly. (See timeline).

Timeline

August 2023	Master list of combined Waco ISD/Head Start students for Jump Start classrooms are defined Collaborative Leadership Team meeting for Head Start/WISD Jump Start prior to students begin.
October 2023	Collaboration Meeting-Administrators Re: Beginning of Year (BOY) Student Assessment Data
February 2024	Collaboration Meeting-Administrators Re: Middle of Year (MOY) Student Assessment Data
April 2024	Develop/Revise MOU for the following year Evaluation of Jump Start Collaboration
May 2024	Pre-K Round-Up/Recruitment and Enrollment for Collaboration Begin ordering materials and supplies for classrooms (curriculum specific).
June 2024	Collaboration Meeting-Administrators Re: End of Year (EOY) Student Assessment Data
June-July 2024	Head Start recruitment and enrollment for the following year continues Dates for parent orientation for each campus are determined by Head Start Child and Family Advocate (acceptance letters are given out to parents during this time)

ATTACHMENT B

PROCEDURAL SAFEGUARDS

The individual shall be afforded procedural safeguards and confidentiality of all identifiable information per Texas Education Code and federal regulation. The district shall:

- Implement all procedural safeguards per Texas and federal laws and regulations.
- Inform parents of legal rights and protections, including due process hearings and complaint procedures
- Inform Head Start of any due process hearing of grievances of children and families who are provided special education by the District and enrolled in Head Start.
- With the parent's written consent, provide information to Head Start.

Head Start shall:

- Ensure all procedural safeguards per Texas and federal laws and regulations are implemented.
- Inform parents of legal rights and protections
- With the parent's written consent, Head Start will provide information to the District.
- Participate in the meetings and assist in developing an IEP for children eligible for special education.
- Facilitate active involvement of parents/guardians.
- Coordinate the review of both agencies.
- Provide space for team meetings.
- Provide a location for Occupational Therapy/Speech/Physical Therapy if students are not enrolled with Waco ISD and the family determines to have services provided at Head Start through Proportionate share funds until these funds are depleted.

TRANSITION

The child with exceptional needs and his or her parents shall benefit from a uniform transition plan from Head Start to the local public school.

The District shall

- Establish a system to ensure a smooth transition of children with disabilities from Head Start center sites to public schools.
- With parent's consent, provide to Head Start by October 13, 2023, of any children in attendance for Head Start students receiving special education services through the district.

Head Start shall:

- Be invited to participate in the preschool transition committee.
- Assist the District in establishing a transition plan for Head Start students transitioning to public school.
- Update the list of identified special education students attending Head Start, home address, emergency information, and telephone number.

AREAS OF COORDINATION AND COOPERATION (1302.63)

1. Information on children enrolled in Head Start and/or jointly enrolled children will be shared with the written consent of the parent /guardian. This information would include the Head Start developmental screenings, contractual screenings/evaluations, physician referrals, etc., per the Head Start Performance Standards Part (1302.63(c) (1-2).
2. A copy of a Head Start Referral and Treatment Record will be sent to Waco ISD when referring a child for further evaluation. Upon completing the evaluation, the school will complete and return the Head Start referral form with a notification if special services are necessary.
3. Waco ISD may refer eligible children to the Head Start program orally or in writing at any time throughout the year.
4. Waco ISD may request a Head Start representative to attend the IEP meeting of a child being considered for Head Start enrollment to explain Head Start service. All information shared will remain confidential.
5. Waco ISD will notify Head Start in writing, electronically, or by phone of Placement Committee Meetings, IEP meetings, or IEP review meetings for any child receiving joint services.
6. An Individual Education Plan (IEP) will be collaboratively developed for each jointly placed child identified with a disability at a staffing that includes the child's parent or legal guardian, public school staff, Head Start staff, and other appropriate service providers.
7. Services for jointly placed children with disabilities, including purchasing necessary equipment, may be cooperatively shared as agreed upon at joint IEP meetings.
8. Staff working with jointly placed children with disabilities will meet monthly.
9. Planning for the transition of each child with disabilities will be discussed during the IEP review. (1302.71)
10. Waco ISD staff may be used on a consultation basis for children served in Head Start, including preschool psychological screening, assessment, and observation. The written recommendation provided by Waco ISD staff will be used by Head Start teaching staff to meet the individual needs of the child/children. All information will remain confidential.
11. Waco ISD and Head Start agree to share information on training and in-services to facilitate joint training whenever appropriate. (1302.71 (2)(iii))

Waco Independent School District

Board of Trustee Meeting Agenda Item

Date: June 29, 2023

Contact Person: Deena Cornblum

RE: Dual Credit Partnership Agreement, Memorandum of Understanding for P-TECH, Memorandum of Understanding for College Prep Mathematic and English Language Arts, and Addendum to Dual Credit Memorandum of Understanding

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Background Information

Board Policy GNC(LEGAL) provides that an agreement between a district and a community college be approved by the board or designee of both the district and the college district. Waco ISD offers opportunities for students to earn college credit from McLennan Community College (MCC) while in high school. Courses are offered on the college campus, on the high school campus and/or online.

The course crosswalk was revised to address realignment needs and to streamline course offerings. An addendum was also added to clarify evaluation procedures of embedded instructors by Waco ISD personnel.

In addition, a Memorandum of Understanding (MOU) with MCC for College Prep Mathematics and English Language Arts Courses, has been prepared to allow Waco ISD to provide these courses to meet the needs of students who are not deemed to be college ready per House Bill 5, Section 10.

To support carrying out the process of the P-TECH Planning Grant, the P-TECH MOU establishes a partnership for course offerings and student support needed for the P-TECH model.

Each of the corresponding documents are attached for your review.

Fiscal Implications

MCC provides free dual credit tuition for students qualifying for free and reduced lunch. As of June 25, 2023, Waco ISD has paid \$64,801.27 for the 2022-2023 school year in tuition to MCC for students who did not qualify for free and reduced lunch, and \$25,718.48 for textbooks for students enrolled in dual credit classes at MCC. Total tuition paid to MCC will be

Administrative Recommendation(s):

Approve the Dual Credit Partnership Agreement, MOUs for College Prep Mathematic and English Language Arts and P-TECH, and the Addendum to the Dual Credit MOU as presented.



Dual Credit Partnership Agreement

August 1, 2023 – July 31, 2024

I. Parties

This Dual Credit Partnership Agreement ("Agreement") is entered into between McLennan Community College ("MCC") and Waco Independent School District ("ISD") and is designed to allow high school students from the ISD to earn dual high school and college credit by enrolling in MCC credit courses.

II. Purpose and Background

In accordance with the rules and regulations of the Texas Higher Education Coordinating Board (THECB), MCC offers regular college credit courses in Core Curriculum, Foreign Language, and Career and Technology for dual credit high school students. If the ISD approves these college courses for dual credit, high school students meeting MCC admission requirements can enroll in these courses and receive college and high school credit simultaneously.

In order to ensure the quality of dual credit courses and to facilitate communications and understanding between the ISD and MCC, the following provisions are agreed to by MCC and the ISD where dual credit courses are offered.

III. Statewide Goals for Dual Credit

Pursuant to Texas House Bill 1638 (85th Legislature, 2017), MCC and Waco ISD set forth the following goals for dual credit programs in Texas, as prescribed by the Texas Higher Education Coordinating Board (THECB) and the Texas Education Agency (TEA).

1. GOAL 1: Create collaborative outreach efforts

- a. The MCC dual credit program will collaborate with the ISD to provide information sessions for parents, students, and high school counselors addressing the potential benefits, risks, and costs of dual credit.
- b. MCC will provide online information regarding the dual credit program, including contact information, eligibility requirements, the enrollment process, cost data, and potential benefits/risks of dual credit coursework.
- c. MCC recruiters will collaborate with the ISD to provide additional assistance to students and families seeking information or assistance with enrolling at MCC.

2. GOAL 2: Improve transition to and acceleration through postsecondary education

- a. The MCC dual credit program requires all new dual credit students to complete an online orientation to facilitate the transition to college coursework.
- b. The dual credit program will collaborate with the ISD to provide in-person or video conference orientation sessions upon request.
- c. The program has identified a Transfer Block of courses that transfer well to Texas public colleges to encourage selection of courses that will apply to a four-year degree.

- d. Dual credit students will be encouraged by MCC to enroll only in courses applicable to their selected degree plan.
3. GOAL 3: Provide college advising and student support services to promote success
- a. The MCC dual credit program requires all students selecting courses outside of the Transfer Block or the Dual Credit Associate of Arts degree plan to meet with a college transfer advisor each semester prior to registration.
 - b. All dual credit students will have access to drop-in college advising via regularly scheduled Zoom sessions.
 - c. All support services at MCC are available to dual credit students. Note that the College provides online and in-person tutoring, library instruction, and success coaching to promote student success.
 - d. MCC and the ISD will collaborate to encourage dual credit students to make use of support services available at the College.
4. GOAL 4: Ensure quality and rigor of dual credit courses
- a. MCC is committed to quality and rigor in its dual credit courses. As required by the THECB and the Southern Association of Colleges and Schools Commission on Colleges (SACSCOC), the quality and rigor of dual credit courses shall be the same as courses taught at the college campus.
 - b. Dual credit faculty, including faculty hired from the ISD, will meet the credentialing standards set by the THECB and SACSCOC.
 - c. Oversight of dual credit faculty and course content will occur according to the same standards and processes employed on the MCC campus.
5. TOOLS: Identify tools to assist students and families with selecting endorsements and dual credit courses as well as navigating the college process.
- a. MCC will provide degree guides through the online Student Planning program as well as dual credit specific guides via the High School Programs website.
 - b. The THECB provides the following tools:
 - 1) College for All Texans
 - 2) Exploring College Options
 - c. The TEA has made the following tools available to the public.
 - 1) Graduation Toolkit: <https://tea.texas.gov/sites/default/files/14Grad-toolkit-booklet.pdf>
 - 2) CTE Pathways: <https://tea.texas.gov/academics/college-career-and-military-prep/career-and-technical-education/approved-cte-programs-study>
 - d. The Texas Workforce Commission provides tools to assist with career selection and education planning at <https://twc.texas.gov/students>.

Metrics associated with the state dual credit goals, such as students' future college enrollment and success, will be tracked by MCC's Office of Institutional Effectiveness.

IV. Eligible Courses

- 1. Courses approved for MCC Dual Credit for a high school student must be foreign language, in the MCC core curriculum, in a state-approved Field of Study curriculum, in

the WECM, or an ACGM course with one of the following rubrics: ACCT, AGRI, ARCH, BCIS, BUSI, COSC, CRIJ, ENGR, ENGT, FORE, FORS, HORT, RNSG. [TAC 19, Part 1, Chapter 4, Subchapter D, §4.85, (i)(2)]

2. Courses approved for dual credit for a high school student must be applicable to a college certificate or degree.
3. This agreement does not apply to MCC Continuing Education courses.
4. See Appendix A for the crosswalk of MCC courses accepted by the ISD with the corresponding high school course information. The ISD may add courses to be articulated for credit by submitting an addendum to this agreement at any time during the academic year.
5. The sequence of courses below is recommended for ISD students beginning dual credit in grade nine (9) with the intent of students earning an associate degree by high school graduation.

Associate Degree Sequence	Fall	Spring
Grade 9	EDUC/PSYC 1300 (3)	ARTS 1301 or MUSI 1306 or DRAM 1310 (3)
Grade 10 Order of BCIS and SPCH may be reversed.	HIST 1301 (3) SPCH 1315 (3)	HIST 1302 (3) BCIS 1305* (3)
Summer	Elective: _____ (3)	
Grade 11	ENGL 1301 (3) GOVT 2305 (3) MATH: _____ (3)	ENGL 1302 (3) GOVT 2306 (3) Elective: _____ (3)
Summer	ENGL 2321 or ENGL 2328 (3)	
Grade 12	Science: _____ (4) SOCI 1301 or PSYC 2301 or ECON 2301 (3) Elective: _____ (3)	Science: _____ (4) Elective: _____ (3) Elective: _____ (3)
Courses may be adjusted with the assistance of an MCC advisor, taking into consideration a student's academic goals at both MCC and future colleges. *BCIS 1305 may not be a required course on all degree plans. However, the course is recommended to build computer skills.		

V. Student Eligibility

1. High school students must meet all eligibility requirements set forth in the THECB Rules.

2. Eligible students may first enroll in dual credit courses in the fall semester of grade nine (9).
3. Eligibility for High School Pathways courses/programs ends six (6) weeks prior to high school graduation.
4. McLennan Community College requires that dual credit students:
 - a. have the written approval of the high school principal or counselor, parent or guardian, and a Counseling Specialist in Student Development or a Dual Credit Coordinator at MCC; and
 - b. unless otherwise exempt, score a 351 or above on the reading section of the TSI Assessment or 945 on the TSI Assessment 2 ELAR multiple choice test or overall passing score on the TSI Assessment 2 ELAR section to qualify for academic courses and workforce courses contained in an AAS or workforce Level 2 certificate;
 - c. satisfy the prerequisites of the desired course and/or program, including additional sections of the TSI Assessment relevant to the requested course or program.

MCC **recommends** high school students score 347 on the reading section of the TSI Assessment or 945 on the TSI Assessment 2 ELAR section before enrolling in workforce education dual credit courses contained in a Level 1 certificate program, or a program leading to a credential of less than a Level 1 certificate.

5. All dual credit students must meet the testing and placement guidelines stipulated in the MCC catalog, the THECB rules, and the Texas Education Code.

A high school student is eligible to enroll in academic dual credit courses if the student:

- a. Demonstrates college readiness by achieving the minimum passing standards under the provisions of the Texas Success Initiative (TSI); or
- b. demonstrates that he or she is exempt under the provisions of TSI.

A high school student is also eligible to enroll in dual credit courses (academic; workforce courses for AAS or Level 2 certificates) under the following conditions:

- a. Courses that require demonstration of TSI college readiness in reading and/or writing: if the student achieves score of 4000 on the English 2 STAAR EOC, an EBRW score of 460 on the PSAT/NMSQT, or an English score of 435 on the ACT-Aspire.
- b. Courses that require demonstration of TSI college readiness in mathematics: if the student achieves a score of 4000 on the Algebra I STAAR EOC and a passing grade in the Algebra II course, a mathematics score of 510 on the PSAT/NMSQT, or a mathematics score of 431 on the ACT-Aspire.

To be eligible for enrollment in a dual credit course offered by McLennan Community College, students must meet all regular prerequisite requirements designated for particular courses. [TAC 19, Part 1, Chapter 4, Subchapter D, §4.85 (b)]

6. Prospective high school students must complete the MCC admission process prior to registration. Students must also submit a recent Bacterial Meningitis Shot Record (within

the past five (5) years) if scheduling a course on the MCC campus. Information is also available on the MCC High School Pathways website.

7. Prospective high school students must have consent of a parent or guardian to participate in the program prior to registration for the first dual credit course.
8. Each semester, prospective high school students must submit a MCC High School Pathways Schedule Request approved by the high school counselor or principal. The Schedule Request must be on file at MCC at the time of registration. The Schedule Request is available through the MCC High School Pathways online enrollment portal.
9. High school students will complete the online High School Pathways Orientation prior to registration for the first dual credit course at MCC. As required by law, students will also complete Title IX training prior to registration for the second semester of coursework.
10. High school students not following the Transfer Block, or the Dual Credit Associate of Arts degree plan, both detailed on the MCC High School Pathways website, will consult with an MCC advisor each semester prior to course registration.
11. High school students taking MCC courses for dual credit will be treated as college students. It is expected that high school students taking MCC courses as dual credit will conduct themselves as college students. A collegiate classroom environment is expected. Controversial material may be addressed. The level of maturity of the high school student should be one of the criteria considered by high school officials prior to approving individuals for enrollment.
12. Dual credit students with less than a 2.0 grade point average (GPA) in MCC courses after completion of six (6) credit hours will be suspended from the program. MCC enrollment may resume after completion of the high school diploma or upon approval by MCC of a suspension appeal.
13. Dual credit students who have three (3) or more withdrawals on their college transcript will be suspended from the program. MCC enrollment may resume after completion of the high school diploma or upon approval by MCC of a suspension appeal.
14. The awarding of high school credit for graduation is at the discretion and approval of the ISD.

VI. Student Composition of Class

1. Dual credit courses will be composed of dual credit students only or of dual and college credit students.

VII. Instructional Calendar

1. Both MCC and the ISD will maintain their own instructional calendars, to begin in August/September and continue through May/June. However, students who are enrolled in dual credit courses at the MCC campus will be expected to attend classes even when the ISD is not in session. Any issues of transportation will need to be addressed and resolved by the student and/or ISD. MCC will not be required to provide transportation.

2. Students enrolled in online dual credit courses will be expected to participate regardless of the ISD calendar.
3. In situations involving dual credit courses on a high school campus, schedule conflicts between the institutions, including ISD holidays and dates of state-mandated testing, will be resolved on a case-by-case basis, but in all instances the contact time for the College course will be maintained either by an additional course meeting or other solution acceptable to both MCC and ISD.

VIII. Faculty Selection, Supervision and Evaluation

1. As required by the Southern Association of Colleges and Schools Commission on Colleges (SACSCOC), MCC controls all aspects of its educational programs. Each educational program for which academic credit is awarded is approved by the faculty and the administration. MCC will maintain qualified faculty who demonstrate the ability to deliver college-level course content with high quality and effectiveness.
2. In order to serve as an instructor of record at MCC, for freshman and sophomore level courses designed for transfer to a baccalaureate degree, faculty should have a minimum of a master's degree with at least 18 graduate hours in the discipline in which they are teaching. In appropriate areas, work experience, professional licensure, and certification are also considered. Degrees and graduate credit hours held by faculty members, whether full time or part-time, must have been earned at a U. S. regionally accredited institution. [SACSCOC, Principles of Accreditation, 3.7.1]
3. In order to serve as an instructor of record at MCC, for associate degree courses designed to prepare students specifically for employment in career and technical areas, instructors should have a minimum of three (3) years of experience in the field, appropriate certification or professional licensure, and educational background and credentials at the same level as or higher than the certificate or degree being awarded in the program. Degrees and graduate credit hours held by faculty members, whether full time or part-time, must have been earned at a U. S. regionally accredited institution. [SACSCOC, Principles of Accreditation, 3.7.1]
4. ISD faculty hired by MCC to teach dual credit courses at the high school site will follow the same application and screening procedures as adjuncts hired to teach at the MCC campus. Employment will only be awarded after approval by the appropriate division or program chair.
5. MCC shall evaluate instructors of college courses offered for dual credit using the same or comparable procedures used for faculty teaching at the MCC campus. Faculty teaching courses for dual credit shall comply with MCC's standards of instruction and policies. [TAC 19, Part 1, Chapter 4, Subchapter D, §4.85 (e)(2)] [SACSCOC, Principles of Accreditation, 3.7.2]

When such evaluations include classroom observation, the ISD will provide access to the classroom in question to the appropriate MCC personnel. The MCC personnel will be expected to comply with the standard ISD visitor screening process.

MCC classroom observations of ISD faculty hired to teach dual credit courses at the high school are separate and distinct from observations made by the ISD for the purposes of district evaluation and employment. ISD observations will be conducted according to district policy with the understanding that 1) the college classroom should experience minimal disruption and 2) the course content, assessment methods, texts, and materials are approved by MCC and may not be altered at the discretion of the ISD.

6. The appropriate representatives of the MCC academic department will evaluate the performance of faculty teaching college courses offered as dual credit. Included in this evaluation will be a determination of how well the faculty member performs in achieving the desired learning outcomes. Additionally, the evaluation will include a review of performance on the items delineated in Section VI, item 9. The evaluation will be forwarded to the Vice President of Instruction for a decision regarding continued employment as an adjunct instructor for dual credit courses. In the event it is determined that a faculty member employed by the ISD will not be granted continued employment, the ISD will be informed in a timely manner. [TAC 19, Part 1, Chapter 4, Subchapter D, §4.85 (e)(2)] [SACSCOC, Principles of Accreditation, 3.7.2]
7. MCC will pay ISD faculty members hired to teach dual credit courses at the high school site in the same manner as other adjunct employees of MCC.
8. The MCC Division Chair of the program area oversees instructional content for college courses taught for dual credit. All course content, learning outcomes, and instructional objectives will be consistent with courses taught on the MCC campus. All instructors must have a syllabus that incorporates instructional objectives and intellectual competencies posted on the MCC website, by the MCC deadline.
9. Faculty teaching college courses for dual credit are expected to carry out the following:
 - a. Teach assigned courses, with the same level of rigor of a regular college course, according to approved course syllabi and learning outcomes associated with course. [TAC 19, Part 1, Chapter 4, Subchapter D, §4.85 (f)]
 - b. Provide each student with a syllabus/class outline that explains the expectations of the instructor, learning outcomes, attendance policy, cheating policy, and other information needed by the student (Examples: timelines, required class materials, outside assignments, course pre-requisites, etc.).
 - c. Check student enrollment in the course. If a student's name does not appear on the MCC class roll, the student may not attend class. If a student's name does not appear, the student should be instructed to contact the MCC High School Pathways Office to complete the enrollment process.
 - d. Arrive on time for classes or notify the High School Pathways Office and the high school as early as possible of an inability to meet a class.
 - e. Submit an instructor absence form to the division director to document each absence.
 - f. Maintain control of the class. If there is a discipline problem that requires immediate attention, contact the administrator in charge on that campus. Additionally, report any serious classroom discipline issues to the MCC Conduct Office, the High School Pathways Office, and the high school administrator.
 - g. Submit Textbook Request Forms to the appropriate academic department for each course taught every semester, by the MCC deadline.

- h. Keep class record books, lesson assignments, and other necessary materials or equipment available for substitute instructors.
 - i. Submit all required class rosters, student grade reports, and required documentation, by MCC deadlines.
 - j. Maintain accurate attendance records for all classes.
 - k. Assign both an alphanumeric *and* numeric grade for each dual credit student. MCC grades will be submitted through the WebAdvisor system.
 - l. Maintain a copy of grade books for each dual credit class at the high school. If MCC personnel need to review grade books, the High School Pathways Program Director and/or the appropriate Division Chair will request and receive a copy at that time. Detailed records should be saved for one (1) calendar year following the end of the course. If employment with MCC ends, records for the previous year should be submitted to the appropriate Division Chair.
 - m. Maintain a Brightspace course shell for each section taught, to include at minimum professor contact information, a course syllabus, grade book, and attendance records.
 - n. Check MCC email on a regular basis for information on deadlines, reporting, grades, etc. This is one form of official communication from the college.
 - o. Attend faculty meetings and other special meetings called by the High School Pathways Office, Division Chair, Dean of Arts and Sciences, Dean of Health Professions, Dean of Workforce & Public Service, Vice President of Instruction, or the President, when possible.
 - p. Direct students seeking accommodations for disabilities to the MCC Accommodations Coordinator for appropriate action. The instructor should not give opinions about disabilities or provide accommodations for disabilities prior to receiving appropriate direction from the MCC Accommodations Coordinator.
 - q. Provide the institution with an updated Curriculum Vitae, which includes educational history.
 - r. Keep the High School Pathways Office informed regarding matters affecting the welfare of students, faculty, and MCC.
 - s. Participate in evaluation procedures in relation to the above stated requirements under this agreement. [TAC 19, Part 1, Chapter 4, Subchapter D, §4.85 (e)(2)] [SACSCOC, Principles of Accreditation, 3.7.2]
10. The ISD shall perform criminal background checks as required by applicable law on all persons teaching dual credit courses that are not paid directly by MCC. The ISD is responsible for ensuring that all such individuals have met acceptable standards under such background checks.
11. MCC is responsible for criminal background checks as required by applicable law on all persons teaching dual credit courses that are paid directly by MCC. MCC is responsible for ensuring that all such individuals have met acceptable standards under such background checks.
12. As with all MCC instructors, faculty teaching courses offered for dual credit who are also employed by the ISD are subject to MCC policies, rules, and regulations. Faculty employed by the ISD will be required to meet the same teaching expectations as other faculty at MCC, expectations delineated in Section VIII, item 9.

13. Faculty teaching courses offered for dual credit who are also employed by the ISD will be required to participate in a minimum of four (4) hours per year of MCC professional development activities, activities such as MCC Professional Development Day, Dual Credit Faculty Seminar, and courses offered through the MCC Center for Instructional Design. For purposes of this agreement, the year shall run from the Fall semester through the end of the Summer 2 semester.

IX. Location of Classes

1. Dual credit courses may be taught on the college campus or on the high school campus, or by distance education, including Internet delivery and/or blended courses. [TAC 19, Part 1, Chapter 4, Subchapter D, §4.85 (c)]
2. For dual credit courses taught exclusively to high school students on the high school campus and for dual credit courses taught electronically, McLennan Community College complies with applicable rules and procedures for offering courses at a distance. In addition, dual credit courses taught electronically comply with the THECB's Principles of Good Practice for Courses Offered Electronically.

X. Transcription of Credit

For dual credit courses, high school as well as college credit should be transcribed immediately upon a student's completion of the performance required in the course. [TAC 19, Part 1, Chapter 4, Subchapter D, §4.85 (h)]

XI. Academic Policies

1. All academic policies applicable to courses taught on MCC campuses shall apply to dual credit high school students enrolled in face-to-face campus, distance education, and courses, as outlined in the MCC policies and catalog. [TAC 19, Part 1, Chapter 4, Subchapter D, §4.85 (g)(1)]
2. Students violating MCC policies relating to academic integrity will be subject to the consequences described in the course syllabus and the relevant MCC policies. Such violations will also be reported to the ISD, but college policy and consequences will have precedence in these situations.

XII. Student Services

1. Students taking college classes for dual credit may utilize the same services that are available to other MCC students. MCC is responsible for ensuring timely and efficient access to such services as academic advising, learning materials (e.g., library resources), and other services for which the student may be eligible. [TAC 19, Part 1, Chapter 4, Subchapter D, §4.85 (g)(2)]
2. Dual credit students are entitled to access online tutoring or face-to-face tutoring at no cost to the student.

3. Students seeking 504-type accommodations for dual credit courses will arrange for those services through the MCC Accommodations/Disability Services office. For details, please visit <http://www.mclennan.edu/disability/>.
4. Dual credit students 17 years of age or older will have the same access to mental health counseling on the MCC campus as other students since parental notification is not required for this age group. Due to HIPAA regulations, requests for mental health counseling made by students younger than 17 will be referred to the respective school counselor or behavioral intervention specialist for mental health counseling.
5. One ISD employee per high school campus will be designated as a facilitator for dual credit students. The facilitator will maintain familiarity with MCC resources and services and assist in guiding dual credit students to those services.
6. College Advising:
 - a. Academic advising for MCC dual credit courses will be the responsibility of the High School Pathways Advisor, currently Ms. Rachel Shackelford, and will occur prior to start date of the relevant semester. The High School Pathways Advisor may directly advise dual credit students or coordinate advising for students through MCC's Advising & Career Services office.
 - b. Academic advising for high school coursework and high school graduation will be the responsibility of an ISD counselor.
 - c. Dual credit students who adhere to the MCC Transfer Block, detailed below, will be permitted to enroll without a mandatory college advising visit. However, students are encouraged to seek college advising. Students who do not adhere to the Transfer Block or the Dual Credit Associate of Arts degree plan will meet with an advisor at least once per semester prior to registration.

Dual Credit Transfer Block

For students not planning to complete an MCC degree while in high school.

- EDUC 1300
- Choose 1: ARTS 1301, DRAM 1310, MUSI 1306
- HIST 1301 and 1302
- Choose 1*: ECON 2301, PSYC 2301
- ENGL 1301 and 1302
- GOVT 2305 and 2306

Dual Credit Associate of Arts

For students planning to complete an MCC associate degree while in high school.

- EDUC 1300
- Choose 1: ARTS 1301, DRAM 1310, MUSI 1306
- SPCH 1315 and/or BCIS 1305**
- HIST 1301 and 1302
- Choose 1*: ECON 2301, PSYC 2301, SOCI 1301
- ENGL 1301 and 1302
- GOVT 2305 and 2306
- Additional courses necessary to complete the associate degree will be selected under the guidance of an MCC academic advisor.

*Check college degree plan or seek college advising to determine best course for a specific degree plan.

**BCIS 1305 recommended to build computer skills. May not be required for college degree plan.

- d. Students will be advised for dual credit courses based on self-identified career and educational goals. Students will not be advised to enroll in courses not appropriate for those identified goals, particularly in courses unlikely to transfer to the student's intended future college.
- e. MCC does not recommend students enroll in more than six (6) semester credit hours the first semester of dual credit.
- f. MCC recommends that dual credit students with an MCC GPA below 2.5 reduce the MCC course load in order to focus on fewer courses with the goal of raising the overall college GPA.
- g. High school counselors are encouraged to participate in advising sessions with their students.
- h. Advising sessions may be scheduled on the high school campus, on the MCC campus, or online via video conference.
- i. Advising notes will be maintained in the MCC system for each student for future reference.
- j. Common terminology:
 - 1) Applicable toward a degree: Refers to a course that will transfer to a school and apply toward a specific degree plan.
 - 2) Core curriculum: A basic set of course options required of all students at a particular institution; commonly refers to the Texas state core curriculum.
 - 3) Course transfer: Refers to whether or not a course will be accepted by another institution of higher education. It is possible for a course to transfer as an elective but not apply toward a specific degree plan.
 - 4) Degree plan: A detailed set and sequence of courses leading to a specified degree in a major.
 - 5) Maximum time frame: A government stipulation that financial aid will only pay for 150% of coursework toward a post-secondary credential. Dual credit coursework applies toward this limit.
 - 6) Satisfactory progress: A government requirement that high school graduates maintain a 2.0 or higher GPA and complete 67% or more of attempted courses to remain eligible for state/federal financial aid. Dual credit coursework may impact this status after high school graduation.

XIII. Student Conduct

- 1. Dual credit students will be subject to MCC student conduct rules, policies and procedures as set forth in the MCC *Highlander Guide* (Student Handbook) while on the MCC campus and/or while in attendance at MCC classes. Students may also be subject to ISD student conduct policies as determined by the ISD.
- 2. Failure to comply with MCC conduct policies may result in dismissal of the student from MCC courses.
- 3. MCC and the partner ISD will cooperate in disciplinary issues to the extent possible. When not possible, each institution may impose separate student penalties according to

its own policies and practices in matters related to discipline and academic integrity.

4. Disciplinary issues will be reported and addressed according to published college policy. ISD employees who are not also employed by MCC may contact the MCC Conduct Office or the High School Pathways office for guidance in reporting an issue.
5. The ISD will notify MCC of student behavioral issues that would impact a dual credit course, particularly in regards to matters concerning student safety.
6. In the event ISD disciplinary measures prevent a dual credit student from attending an MCC course, the student, ISD, and MCC will consult regarding possible outcomes. If the student's absences will exceed 25% of course meetings, and if no satisfactory alternative can be found, the student will be withdrawn from the MCC course for disciplinary reasons.
7. In the event a conduct or academic-integrity-related visit to the high school is needed, the ISD will facilitate a meeting between the student(s) in question and the appropriate MCC personnel. The MCC personnel will be expected to comply with the standard ISD visitor screening process.

XIV. Course Curriculum, Instruction, and Grading

1. The MCC Division Chair of the program area oversees instructional content for college courses taught for dual credit.
2. MCC shall ensure that a college course offered for dual credit at the high school and the corresponding course offered at the College are equivalent with respect to the curriculum, contact hours, course maximum, materials, instruction, and method/rigor of evaluation of student performance, regardless of student composition of the class. [TAC 19, Part 1, Chapter 4, Subchapter D, §4.85 (f)]
3. All MCC instructors must have a syllabus on file which incorporates the policy and procedure for learning outcomes, grading policies, and disability services.
4. Instructors shall follow MCC grading policies for awarding college credit.
5. Faculty will participate in providing information for the assessment of student learning outcomes as required by the Southern Association of Colleges and Schools Commission on Colleges. This includes, but is not limited to, the submission of summary scores/data where such information is needed for evaluating departmental success and the submission of student work for secondary evaluation by the division to ensure that relevant learning outcomes are achieved in any given course.

XV. Grade Reports

1. MCC will provide grade reports for dual credit students each semester following the conclusion of the final exam period.

2. Grades will be reported via an unofficial college transcript that provides information regarding courses, letter and numeric grades, and cumulative GPA.
3. Progress reports may be requested by an ISD during the semester for dual credit-only courses offered on the high school campus with the following restrictions.
 - a. Requests will be made to the High School Pathways office via email and will identify the course, section, and date the progress report is needed.
 - b. A high school will request no more than two progress reports per semester.
4. Progress reports will not be an option for dual credit students in online sections and/or in sections in which they are blended with traditional college students. Instead, students may log in to Brightspace to provide the ISD with current grade information from the online course gradebook.

XVI. Transfer of Courses

McLennan Community College is fully accredited by the SACSCOC, and basic academic, general education courses are readily transferable to other public institutions of higher education in Texas. However, since each college has its own policy regarding the transferability of courses, students are strongly advised to check with the college they plan to attend after high school, other than MCC, in order to determine the transferability of MCC courses.

CTE/Workforce education courses are not designed for transfer beyond the community college level. However, programs exist at some universities that allow these courses to be applied directly to baccalaureate degree requirements. Students are encouraged to check with prospective universities concerning programs such as the BAAS, BAT, and other similar programs.

XVII. Academic Regulations

1. An MCC class minimum of fifteen (15) students is deemed necessary for a dual credit-only course section. Any exceptions will be approved by the Vice President of Instruction.
2. MCC courses offered as dual credit, regardless of where they are taught, follow the same college calendar, syllabus requirements, course outline, grading procedure, and other instructional and evaluative policies and procedures. [TAC 19, Part 1, Chapter 4, Subchapter D, §4.85 (g)(1)]
3. The Texas Education Code and SACSCOC do not allow for outside influence on college grading systems.
4. Letter grades are given in accordance with policies printed in the college catalog. Whenever possible, numerical grades will be provided to the high school counselor by the High School Pathways Office. Dual credit grades will be provided to the ISD each semester the week following final exams.
5. In the event of a grade dispute, the MCC policy for grade appeals will be followed. Please see the MCC catalog and/or the *Highlander Guide*.

6. Dual credit students may withdraw from a course and receive a grade of "W" at any time during the semester on/prior to the MCC official drop deadline specified in the College Calendar located in the class schedule or catalog. After the MCC official drop deadline, dual credit students will follow published MCC policy in regards to withdrawing from courses and the grade recorded for such courses. It is the student's responsibility to officially withdraw from a course or verify that the instructor initiated the withdrawal procedure.

XVIII. Attendance and Funding

1. Students enrolled in college credit courses will follow current MCC attendance policies. Attendance will be taken at MCC based on the published College Attendance Policy.
2. The cost of tuition and fees will be based on the current McLennan Community College tuition and fee schedule for dual credit students.
3. State funding for college courses offered for dual credit will be available to both the ISD and MCC based upon current funding rules of the State Board of Education and the Texas Higher Education Coordinating Board. [TAC 19, Part 1, Chapter 4, Subchapter D, §4.85 (i)(1)]
4. MCC waives tuition and standard fees for students demonstrating financial need. Information and an application form for this tuition exemption are available through the High School Pathways office and the online enrollment portal. Tuition for other students will be the responsibility of the student or the ISD.
5. Textbooks, transportation, classroom supplies, and special fees will be the responsibility of the student or the ISD.
6. MCC will consider the use of free or low-cost open educational resources for courses as may be deemed appropriate by the faculty member and MCC.

XIX. Classroom Facilities and Technology

1. The ISD agrees to provide MCC faculty and dual credit high school students with the facilities and technology necessary to support a college learning environment.
2. The high school or ISD will ensure MCC faculty and the dual credit students have access on ISD devices and through ISD Internet service to MCC email, Brightspace, Zoom, WebAdvisor, the MCC Library, and other software programs approved by MCC for campus-wide use.
3. Dual credit students will regularly need access to devices capable of running online exam monitoring programs and devices and/or Internet access unrestricted by the ISD internet filter. In addition, some courses may require audio or video recording capability. Such access is vital for academic integrity measures, Internet-based course materials, research, and course projects. Student resources are available on the MCC campus to fulfill such needs should the student choose to implement them.

4. MCC recommends the ISD assign students enrolled in online dual credit courses to a computer lab with a facilitator for at least one class period per day.

XX. Data Sharing

Student records transferred between MCC and the ISD shall remain the sole property of the institution that created the records. Data that is transferred must be used consistent with the Family Educational Rights and Privacy Act (FERPA), HIPAA, and ISD and MCC policies and procedures for managing student education records and other confidential information.

The Parties expressly understand that MCC and the ISD are subject to the requirements of the Texas Public Information Act. In the event that any student records must be released pursuant to state or federal law, as determined by a court or administrative agency with jurisdiction over the matter, the Parties shall continue to treat a confidential any student records received or created under this Agreement except to the extent specifically required by the court or administrative order. The Parties shall mark as "CONFIDENTIAL" all records that are released.

XXI. Indemnity and Liability

1. To the extent allowed by law, the ISD does hereby agree to defend, indemnify, and hold harmless MCC, its Board of Trustees, agents, employees, and representatives, from and against any and all causes of action, claims, liabilities, debts, or judgments arising from or related to: (1) the actions or omissions of ISD instructors provided under this Agreement; or (2) the actions or omissions of any employee, agent, instructor, or anyone else acting on behalf of the ISD in the performance of this Agreement.
2. To the extent permitted by applicable law, the ISD assumes all liability related to or arising from the acts and/or omissions of its employees, contractors, agents, or representatives related to this Agreement or the dual credit program.

XXII. Force Majeure

Neither Party hereto will be liable or responsible to the other for any loss or damage, or for any delays or failure to perform (other than the performance of payment obligations), due to causes beyond either Party's reasonable control, including but not limited to acts of God; flood; fire; earthquake; explosion; order, requisition, or necessity of the government; war, invasion or hostilities (whether war is declared or not); terrorist threats or acts, riot, or other civil unrest; regional or national emergency; revolution; insurrection; epidemic or pandemic; lock-outs, strikes or other labor disputes (whether or not relating to either Party's workforce); restraints or delays affecting carriers or inability or delay in obtaining supplies of adequate or suitable materials; telecommunication breakdown or power outage; and/or any other circumstances of like character. Should performance of any obligation (other than any payment obligations) created under this Agreement become illegal, impossible, impracticable, not reasonably possible, or if a Party is otherwise prevented or hindered from complying by a force majeure incident as described in this section or any other cause not enumerated herein but which is beyond the reasonable control of the Party whose performance is affected, then the performance of any such obligation is suspended during the period of, and only to the extent of, such prevention or hindrance, provided the affected Party provides reasonable notice as soon as practicable (within 45 days) following an event of force majeure and exercised all reasonable diligence to remove

the cause of force majeure.

XXIII. Miscellaneous

1. Both parties agree to have a spirit of cooperation and to endeavor to provide a positive collegiate-level experience for those high school students with the maturity and academic preparation to be successful in college-level courses.
2. All policies and requirements set forth herein are subject to the THECB Rules, and, in the event of conflict, the THECB Rules govern and apply. [TAC 19, Part 1, Chapter 4, Subchapter D, §4.85, (i)(2)]
3. This Agreement may only be modified in writing signed by both parties.
4. This Agreement will become effective on the date the last party executes it and will remain in effect until either party decides to terminate same. Either party may terminate this Agreement without cause by giving the other party notice in writing at least thirty (30) days before the beginning of the first day of the MCC semester or ISD semester, whichever is earlier.
5. Nothing herein shall waive the parties' immunity to suit or liability as established by applicable law.
6. The parties to this Agreement are not in a joint venture, partnership, or otherwise.
7. This Agreement shall be governed by the laws of Texas.
8. All parties to this Agreement agree to abide by and comply with all applicable laws regarding student privacy including, but not limited to, FERPA.
9. Notwithstanding anything to the contrary in this agreement, MCC acknowledges, stipulates and agrees that nothing in this agreement shall be construed as a waiver of any defenses available to the ISD under applicable law, including, without limitation, any statutory or governmental immunity from suit and liability.
10. MCC is aware and acknowledges that the ISD (a public entity) is subject to constitutional and statutory limitations on its ability to enter into certain terms and conditions of the agreement, which may include those terms and conditions relating to: liens on the school property; disclaimers and limitations of warranties; disclaimers and limitations of liability for damages; waivers, disclaimers, and limitations on legal rights, remedies, requirements, and processes; limitations of time in which to bring legal action; granting control of litigation or settlement to another party; liability for acts or omissions of third parties; payment of attorney's fees; dispute resolution; indemnities; and confidential information. Terms and conditions relating to these limitations will only be binding on the school to the extent permitted by the constitution and the laws of the state of Texas.
11. The signatures below indicate and represent that the governing boards of both MCC and ISD have approved this Agreement.

XXIV. Other Agreements with the ISD

This agreement does not apply to MCC Continuing Education courses offered in the ISD, nor other agreements between MCC and the ISD. MCC and the ISD will have a separate and distinctive agreement for MCC Continuing Education courses offered to ISD students.

XXV. Accommodations/Disabilities

Dual credit students who may require accommodations in order to have proper access to meet course requirements due to a documented disability should contact MCC Accommodations (Disability Services) as soon as possible. Students will be required to complete the registration form in WebAdvisor, submit documentation for the diagnosed disability, and meet with the Accommodations Coordinator. Faculty and the student will receive an email confirming all accommodations. Faculty may also review accommodations by accessing their roster via WebAdvisor, and students may review their accommodations under the My Accommodations Plan in WebAdvisor. Please note that instructors are not required to provide classroom accommodations to students until appropriate verification from Accommodations (Disability Services) has been provided. Note also that accommodations may differ between the high school and college. For additional information, please visit mclennan.edu/disability.

Students with questions or who require assistance with disabilities involving physical, classroom, or testing accommodations should contact:

Accommodations (Disability Services)
disabilities@mclennan.edu
 254-299-8122
 Student Services Center Room 319

MCC policies related to accommodations will apply to students enrolled in dual credit courses. In appropriate circumstances, MCC and the ISD may collaborate to provide accommodations to dual credit students.

XXVI. Title IX

MCC cares about student safety and values an environment where students and instructors can successfully teach and learn together. Individuals who would like to report an incident of sexual misconduct are encouraged to immediately contact the Title IX Coordinator at titleix@mclennan.edu or by calling Dr. Claudette Jackson, Acting IX Coordinator, (Director of Diversity, Equity and Inclusion) at (254) 299-8645. Individuals also may contact the MCC Police Department at (254) 299-8911 or the Student Counseling Center at MCC by calling (254) 299-8210. The MCC Student Counseling Center is a confidential resource for students. Note: Disclosures by students under 17 years old may be subject to mandated reporting requirements related to minors' safety and/or releases to parents/guardians.

McLennan's Title IX webpage (<http://www.mclennan.edu/titleix/>) contains more information about definitions, reporting, confidentiality, resources, and what to do if someone is a victim of sexual misconduct, gender-based violence or the crimes of rape, acquaintance rape, sexual assault, sexual harassment, stalking, dating violence or domestic violence.

In the event a Title IX-related visit to the high school is needed, the ISD will facilitate a meeting between the student(s) in question and the appropriate MCC personnel. The MCC personnel will be expected to comply with the standard ISD visitor screening process.

XXVII. Non-Discrimination

Neither McLennan Community College nor Waco Independent School District will discriminate against any individual regardless of race, color, religion, national or ethnic origin, gender, disability, age, veteran status, genetic information, sexual orientation, gender identity, pregnancy, or other legally protected category in its educational programs, activities, or employment as required by Title VI or Title VII of the Civil Rights Act of 1964, Section 504 of the Rehabilitation Act of 1973, Title IX of the Educational Amendments Act of 1972, and the Age Discrimination Act of 1978.

The following staff member is designated to handle inquiries regarding nondiscrimination policies: Dr. Claudette Jackson, Acting Title IX Coordinator, (Director of Diversity, Equity & Inclusion), 1400 College Drive, 254-299-8645, titleix@mclennan.edu.

The chart below is a complete list of courses accepted by the District with the corresponding high school course information. The District may add courses to be articulated for credit by submitting an addendum to this agreement at any time during the academic year.

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P-TECH Memorandum of Understanding August 1, 2023 – July 31, 2024

CREATION OF THE P-TECH

This document is executed as a Memorandum of Understanding (MOU) between McLennan County Junior College District, an Institute of Higher Education (herein referred to as MCC) , and the Waco Independent School District (herein referred to as ISD), a local public school, which are both located in McLennan County, Texas. It has been developed for the support of the Waco Early College High School as a Pathways in Technology Early College High School (P-TECH) under the auspices of the Texas Education Agency (TEA) Early College High School Designation pursuant to the authority granted in compliance with section 29.551-557 of the Texas Education Code.

WHEREAS, the purpose of this agreement is to outline the collaboration of the parties, as listed above, in support of Waco P-TECH.

WHEREAS, the parties to this MOU desire a Pathways in Technology Early College High School and seek to provide for enrollment in college courses by the P-TECH students in accordance with the Texas Higher Education Coordinating Board (THECB) Rules, as codified under Title 19, Part 1, Chapter 4, Subchapter G of the Texas Administrative Code;

WHEREAS, both Waco ISD and MCC are willing and able to facilitate development of this program to benefit underserved students;

WHEREAS: MCC and Waco ISD are authorized by state law to establish and enter into agreements for P-TECH programs;

NOW, THEREFORE, the parties to this MOU mutually agree to the following:

Purpose

This school, serving grades 9-12, will offer traditionally underserved students (at-risk, economically disadvantaged students, students who are English language learners, and first generation college students) an opportunity to complete a high school diploma and earn up to 60 credit hours toward an Associate degree. While attending the P-TECH, these students will develop a commitment to learning, a capacity for critical thinking, an understanding of their future role as community leaders, and the academic and technical skills necessary to achieve success in these and other arenas. Students graduating from the P-TECH will enter post-secondary education and/or training with significant advanced standing.

Principles

- A. To establish a mutually beneficial partnership between MCC and the ISD that allows a flexible and creative response to the missions and organizational/fiscal needs of both institutions.
- B. To collaborate in the planning, implementation, and continuous improvement of Pathways in Technology Early College High School programs, including provision for faculty, staff, and administration.
- C. To provide rigorous college readiness and early college credit courses.
- D. To collaborate financially to address costs of both partners and assist each in obtaining necessary funds from local, state, federal and private/foundation sources to operate the program successfully and without student fees. MCC will waive tuition and standard fees for

students identified as economically disadvantaged according to the established guidelines for the MCC dual credit tuition exemption. Day to day costs, such as transportation to and from the MCC campus, will be the responsibility of the P-TECH.

- E. To assure that classes and activities of the P-TECH on the MCC campus will occur with students integrated on an age-appropriate basis in accordance with college readiness guidelines established by the Texas Higher Education Coordinating Board and the Texas Education Code.
- F. To share use of facilities including classrooms, labs, offices and libraries in ways that reduce operating costs and promote collaboration of students, faculty, staff, and community members in program success.
- G. To promote student success through participation in college visits and in academic and admission procedures, including advisement, registration procedures, assessment and placement procedures, at MCC. In addition, weekend, Saturday, or summer programs and activities, and extracurricular activities may be offered by the ISD, MCC, or both. Students will gain access to the MCC facilities by way of their MCC student ID cards.
- H. To ensure the selection of students based on the intent of the program, a selection that will reflect the diversity of the student populations identified.

Term

Subject to the approval of the Program application by TEA, any additional approvals that may be required from the THECB, and annual approval as required by law or by TEA or THECB, the term of this MOU shall commence upon the date that the second of the Parties has signed this MOU ("Commencement Date") and shall expire on July 31, 2024 ("Expiration Date"). Notwithstanding the foregoing, both Parties acknowledge and agree that a condition precedent to a Party's signing the MOU is approval of the Agreement by that Party's governing board. The time period between the Commencement Date and the Expiration Date shall be referred to as ("Initial Term"). Upon mutual written agreement by the Parties and approval as may be required by the Parties' governing boards, TEA, and THECB, this MOU may be extended for a one-year renewal term ("Renewal Term"). As used in this MOU, the term ("Term") shall mean the Initial Term, or such shorter period of time in the event of termination of this MOU at any time on notice by either party as set forth on page 7 below.

Governance

- A. The Early College High School established under this agreement will be governed by state and federal laws and regulations, as well as ISD, and college policies and requirements. The ISD shall apply to the Texas Education Agency for the establishment and continued approval of a P-TECH designation.
- B. A Steering Committee comprised of representatives of MCC and the ISD, and co-chaired by the MCC President and the ISD Superintendent, shall meet once per semester, or as mutually agreed to by both parties, to evaluate instructional and programmatic activities, identify problems, issues and challenges that arise, and make recommendations regarding more effective coordination and collaboration. The Steering Committee shall make reports, at least annually, to their respective boards.
- C. An Advisory Committee will be created for the purpose of establishing local, state, and national partnerships, to leverage opportunities for fund development, innovative projects, and overall sustainability. The advisory committee shall meet at least twice annually and shall consist of representatives from MCC, the ISD, local and regional communities. The Advisory committee and all other subcommittees established under this entity will report as needed and as requested to the Steering Committee.
- D. The P-TECH Director/Principal (chief administrative officer of the P-TECH) will be appointed by the Superintendent of the ISD. The Director will be an employee of the ISD. The ISD will be responsible for payment of benefits, if any, to the Director, and the Director shall not be entitled to receive employee benefits from the MCC including, but not limited to, unemployment

compensation, workers' compensation, health insurance and retirement benefits. The ISD assumes full responsibility for workers' compensation insurance and for payment of all federal, state and local taxes or contributions, including, but not limited to, unemployment insurance, Medicare and income taxes with respect to the Director. Should the school Director position become vacant and the need to appoint a new Director arise, following all ISD Human Resources Policies and Procedures, MCC will have the opportunity to be represented on the Director search committee and take part in the deliberations. The ISD agrees to assign the Director as soon as a qualified candidate is identified and hired. An adequate number of faculty for high school credit-only courses, counselor(s), clerical staff, and any other high school personnel that may be necessary, will be the responsibility of the ISD.

- E. This Agreement does not create a partnership or a joint venture between the parties hereto, nor does it authorize either party to serve as the legal representative or agent of the other. Neither party will have any right or authority to assume, create, or incur any liability or any obligation of any kind, expressed or implied, against or in the name of or on behalf of the other party.

Location

The Pathways in Technology Early College High School will offer courses at the P-TECH campus for ISD students served in 9th and 10th grades. P-TECH courses for 11th and 12th grades will be held at the MCC campus as appropriate. Approved locations and delivery models can include:

- P-TECH site
- MCC campus
- Internet Delivery, including hybrid

Subchapter B, Chapter 39

The P-TECH shall comply with State Board of Education rules regarding administration of the assessment instruments as required by Subchapter B, Chapter 39 and shall adopt a policy that requires a student's performance on an end-of-course assessment instrument for a course listed in this subsection in which the student is enrolled to account for 15 percent of the student's final grade for the course. In addition, the P-TECH will administer the Texas Success Initiative college placement exam to all incoming ninth (9th) graders to assess college readiness and to enable students to begin college courses based on their performance as soon as students are able and willing.

P-TECH students will be required to participate in the appropriate end-of-course assessment instruments for secondary-level courses in Algebra I, biology, English I, English II, and United States history as specified in Texas Education Code 39. 023. Early College High School students will be required to participate in Algebra I EOC in grade 8; English Language Arts I EOC and Biology EOC in grade 9; and English Language Arts II EOC and United States History EOC in grade 10.

Grading Periods and Policies

P-TECH students classified as freshmen and sophomores will be enrolled in coursework at the P-TECH campus. P-TECH students classified as juniors and seniors will receive course instruction at the MCC campus, as appropriate.

Grading periods and policies for high school courses will be governed by ISD high school policies and procedures. All grades will be recorded in a numerical format or other format approved by the ISD. ISD Grade Point Average (GPA) policies will remain in place for the P-TECH students. P-TECH course grades are weighted for Grade Point Average purposes as specified by the ISD. All grading practices and policies are defined in the P-TECH Student and Parent Handbook.

Grading periods and policies for college credit courses will be under the authority of the College. MCC grading practices are on a semester rotation. The Course Catalog, syllabi and policies at MCC will determine the grading practices. Grades for college credit coursework will be provided to the P-TECH each semester the week following final exams.

Eligible Courses

1. Courses approved for dual credit for a P-TECH student must be applicable to a college certificate or degree.
2. This agreement does not apply to MCC Continuing Education courses.

Student Eligibility

1. P-TECH students will not be asked to meet a minimum high school GPA in order to enroll in coursework.
2. Eligibility requirements specified in the dual credit portion of this agreement will apply.

Courses of Study

Courses of study will be developed to allow the implementation of rigorous academic standards. Courses to be included will apply to an associate degree, post-secondary certificate, or industry certification.

Associate of Arts/Associate of Science—P-TECH		
	Fall	Spring
Grade 9	PSYC/EDUC 1300 (P-TECH site or online)	ARTS 1301 (online)
Grade 10	HIST 1301 (P-TECH site) SPCH 1315 (P-TECH site or	HIST 1302 (P-TECH site) BCIS 1305* (online)
Summer	Elective: _____ (MCC campus/online)	
Grade 11	ENGL 1301 (P-TECH site) GOVT 2305 (MCC campus/online) MATH: _____ (MCC campus/online)	ENGL 1302 (P-TECH site) GOVT 2306 (MCC campus/online) Elective: _____ (MCC campus/online)
Summer	ENGL Literature (MCC campus/online)	
Grade 12	Science: _____ (MCC campus/online) SOCL 1301 or PSYC 2301 or ECON 2301 (MCC campus/online) Elective: _____ (MCC campus/online)	Science: _____ (MCC campus/online) Elective: _____ (MCC campus/online) Elective: _____ (MCC campus/online)
Courses may be adjusted with the assistance of an MCC advisor, taking into consideration a student's academic goals at both MCC and future colleges. *BCIS 1305 may not be a required course on all degree plans. However, the course is recommended to build computer skills.		

Curriculum Alignment

Curriculum alignment will be assured through completed grade level based “crosswalks” or matrices that delineate which P-TECH courses may be taken for college credit. The crosswalks will be reviewed annually by MCC and the P-TECH.

See Appendix A for the detailed course crosswalk.

Instructional Materials

Instructional materials for high school courses will be under the authority of the ISD and the P-TECH. Instructional materials will be provided that align with approved PEIMS courses as specified by the Texas Education Code, the High School curriculum and teacher syllabi.

Students enrolled in MCC courses will use instructional materials adopted by MCC. The P-TECH will be responsible for purchasing appropriate materials, including college textbooks, for students enrolled in college credit courses. P-TECH faculty teaching college credit courses may select their own instructional materials as permitted by the policies of the MCC department/division.

To the extent possible, MCC will coordinate with the ISD to reduce college textbook costs through use over multiple semesters and/or the use of low-cost open educational resources.

Assistance, Student Waivers and Fees

MCC agrees to waive tuition and standard fees for students identified as economically disadvantaged according to the established guidelines for the MCC dual credit tuition exemption. Tuition and fees for the remaining students who do not qualify for MCC exemptions will be the responsibility of the ISD. P-TECH students will not have financial responsibility for tuition, fees or transportation costs associated with the program.

P-TECH Enrollment and Attendance

Students are eligible to enroll in the P-TECH after they have filled out all necessary application forms, including parental support forms. The ISD will select students through a blind scoring of each application according to the application rubric. All students enrolled in high school courses will be expected to follow current ISD attendance policies. Attendance records will be taken for all courses offered at the P-TECH campus.

Students enrolled in college credit courses will follow current MCC attendance policies. Attendance will be taken at MCC based on the published College Attendance Policy.

Building a College Culture

The P-TECH and MCC will establish a learning community that blends high school and college, instilling a college-going culture among participating students. P-TECH students will:

- develop a four-year high school graduation plan and post-secondary plan;
- participate in high school credit classes and college credit classes for which students receive both high school and college credit; and
- participate in an advisory program which provides college campus orientation, academic counseling, college and career planning and additional student counseling.

Professional Development

Professional Development of the P-TECH staff will be on-going, and will be provided through a selected Campus Improvement Team. The MCC liaison will meet with the Team to identify any challenges and make recommendations to the Principal for effective coordination, collaboration and continued development of the P-TECH. P-TECH faculty teaching college credit courses will be expected to participate in professional development activities offered by MCC, a minimum of 4 hours per academic year, which may include Professional Development Day, the annual Dual Credit Seminar, general faculty meetings, and division meetings. Professional development of MCC faculty will be addressed by MCC.

MCC will endeavor to provide professional development opportunities that will promote interaction between P-TECH, MCC faculty and advisors.

Procedures for Collecting and Sharing Data

Student data will be collected at the P-TECH facility in accordance with state regulations and ISD data collection procedures. All student data will be disaggregated from the High School general population. Student data to be shared with MCC will include, but is not limited to, demographic and academic information, including TSI readiness by grade level, SAT/ACT and PSAT scores, number of hours taken and credits earned, GPA's, results of State assessments, and any other data necessary to assess program effectiveness in accordance with the Family Education Rights and Privacy Act.

The Parties agree to maintain the records of all students in accordance with all applicable federal, state, and local laws. In accordance with the Family Education Rights and Privacy Act ("FERPA") (20 U.S.C. §1232g) and ISD Board Policy, all records relating to students which are generated or maintained by either party shall be considered education records in accordance with applicable laws and policies. All parties shall maintain the confidentiality of these and all education records in accordance with all applicable state, federal and local laws and regulations, including FERPA. For purposes of this agreement, each party designates the other party as its agent with legitimate educational interest in the students' educational records for purposes of FERPA.

Records related to teacher qualifications will be maintained by the ISD and MCC in accordance with current institutional policies related to privacy and recordkeeping. ISD teachers applying for adjunct faculty positions with MCC will submit appropriate paperwork directly to MCC.

Evaluation

The ISD and MCC will develop a plan for the evaluation of the P-TECH program to be completed each year that will include, but not be limited to, attendance and retention rates, GPA of high school-credit only courses and college courses, satisfactory progress in college courses, and adequate progress toward the college-readiness of the students in the program.

Additional Requirements--Dual Credit at MCC

Given that a P-TECH program is a specialized form of dual credit, the MCC policies regarding dual credit will also apply to P-TECH students from the ISD unless noted otherwise in the P-TECH portion of the agreement.

A separate section of this agreement details the dual credit agreement between MCC and the ISD, covering both P-TECH students (except as noted above) and traditional dual credit students from the ISD.

Severability

If any clause or provision of this agreement is determined to be illegal, invalid, or unenforceable under present or future laws effective during the term of this agreement, including any renewals, then in that event it is the intent of the parties hereto that the remainder of this agreement shall not be affected thereby, and it is also the intent of the parties to this agreement that in lieu of each clause or provision of this agreement that is illegal, invalid or unenforceable, there be added as part of this agreement a clause or provision as similar in terms to such illegal, invalid or unenforceable clause or provision as may be possible and be legal, valid and enforceable.

Termination

This agreement and partnership may be terminated by either party upon ninety (90) days written notice to the other party. In the event of termination during the initial term of this agreement, the effective date of termination shall be as of June 30 following the notice. It is the intent of both parties that no termination shall be made during the middle of the school year which will disrupt the academic progress for the students of the P-TECH, unless the parties mutually agree.

Provision for Discontinuation

Discontinuation of the P-TECH program will only be allowed at the end of a grade level cohort, or when a cohort graduates. Discontinuation of the program will provide for the support of students enrolled in the program to ensure proper planning for graduation, and meet all the required elements of the program until complete discontinuation of the program.

WACO SCHOOL DISTRICT

MEMORANDUM OF UNDERSTANDING WACO INDEPENDENT SCHOOL DISTRICT AND McLENNAN COMMUNITY COLLEGE COLLEGE PREP MATHEMATICS AND ENGLISH LANGUAGE ARTS COURSES

This Memorandum of Understanding (MOU) is entered into as of the 1st day of August 2023 (the “Effective Date”) between the Waco Independent School District (Waco ISD), a Texas independent school district located at 501 Franklin Ave., Waco, TX 76701, and McLennan Community College (MCC), a community college located at 1400 College Drive, Waco, Texas 76708.

WHEREAS, The State of Texas mandated via House Bill 5, Section 10 that each school district shall partner with at least one institution of higher education to develop and provide courses in college preparatory mathematics and English Language Arts;

WHEREAS, the parties have agreed to enter into a collaborative agreement where students who are deemed not to be college ready per House Bill 5, Section 10;

WHEREAS, Waco Independent School District (Waco ISD) and McLennan Community College (MCC) jointly recognized an opportunity to create seamless pathways for students to enter into college level work in Mathematics and English Language Arts without further remediation;

NOW, THEREFORE, in consideration of the mutual covenants and conditions contained in this MOU and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, Waco ISD and MCC, intending to be legally bound, agree as follows:

1. Scope of Services. Waco ISD and MCC agree to collaborate to develop and maintain developmental Mathematics and English Language Arts courses that meet the terms of this agreement as outlined in the Support and Services section of this MOU. Waco ISD and MCC will communicate regularly to maintain the integrity and evaluate the effectiveness of the program.
2. Term. The term of this MOU shall begin on August 1, 2023, and continue for a period of one year. Either party may terminate this MOU, without cause, upon at least thirty (30) days prior written notice to the other party, with termination effective upon the expiration of the thirty (30) days or as mutually agreed to by the parties.
3. Support and Services. Waco ISD and MCC agree to the following conditions:
 - A. MCC agrees to the following for both the Mathematics and English Language Arts courses:

- i. To share data and provide feedback regarding student success on entry-level college Mathematics and English Language Arts courses;
 - ii. To train advisors to recognize and honor course(s) on school district transcripts;
 - iii. To ensure that eligible students are counseled directly into college level Mathematics, English Language Arts, and all other courses that require Mathematics and English Language Arts college readiness;
- B. MCC agrees to the following for the college preparatory Mathematics courses:
- i. To provide Student Learning Outcomes;
 - ii. To provide Instructor Plans (IPs) for the courses being offered;
 - iii. To recommend a Math XL-based product (such as MyMathLab or MyFoundationsLab) for each student enrolled in the course;
- C. MCC agrees to the following for the college preparatory English Language Arts course:
- i. To provide the Student Learning Outcomes for the Integrated Reading and Writing (INRW 0402) course;
 - ii. To provide the syllabi, including types of essays required (i.e., expository, persuasive, and critical analysis) and the rubrics for grading those essays, including the reading skills assessments required;
 - iii. To recommend use of the McLennan-adopted INRW textbook and the associated online product, Connect, for each student enrolled in the course;
- D. Waco ISD agrees to the following for both the Mathematics and English Language Arts courses:
- i. To provide highly qualified instructors for the courses being taught;
 - ii. To identify students who are not college ready as stated in HB 5;
 - iii. To provide professional development and resources required to teach the Mathematics and English Language Arts courses;
 - iv. To identify successful completion of the course(s) on the student transcripts as determined by the State of Texas PEIMS number;
 - v. To provide curriculum for the course that is consistent with MCC Student Learning Outcomes;
 - vi. To follow the Waco ISD grading expectations;
 - vii. To administer the relevant portions of the TSI Assessment as the final exam for the year-long course sequences without exception, including the Adult Basic Education (ABE) portions of the TSI Assessment;
 - viii. To provide assistance with college enrollment and financial aid applications;
- E. Waco ISD agrees to the following for the college preparatory Mathematics course:
- i. To teach Elementary Algebra during the fall semester and Intermediate Algebra the spring semester;
 - ii. To administer the Mathematics section of the TSI assessment as the final exam, including the Adult Basic Education (ABE) portions of the TSI Assessment;
 - iii. To ensure transferability of the course grade to MCC, the student must have a passing score on the Mathematics section of the TSI Assessment;



- F. Waco ISD agrees to the following for the college preparatory English Language Arts course:
- i. To teach a course in Integrated Reading and Writing (INRW 0402) that focuses on critical reading and college-level writing, as well as college readiness skills;
 - ii. To use the curricular objectives and assignments established by MCC, including grading methods and rubrics for essays, and the particular major reading exams;
 - iii. To administer the reading and writing sections of the TSI Assessment as the final exam for the course, including the Adult Basic Education (ABE) portions of the TSI Assessment;
 - iv. To ensure transferability of the course grade to MCC, the student must have passing scores on the reading and writing sections of the TSI Assessment.
4. Non-Compliance. Notwithstanding any provision herein to the contrary, if MCC does not comply with any part of the MOU, and the failure to comply is not corrected within thirty (30) calendar days after written notice from Waco ISD, this MOU may be terminated immediately upon written notice from Waco ISD, at Waco ISD's sole discretion.
5. Liability. Neither Waco ISD nor its trustees, officers, employees or agents shall have any liability or responsibility for any claim or cause of action of any person or group arising from (a) the use of district property and/or equipment by MCC and MCC's officers, volunteers, employees, contractors, agents, invitees, licensees, participants, and visitors, or (b) non-compliance with this MOU, or (c) any act, omission, or negligence of MCC, or any of its officers, agents, employees, contractors, invitees, licensees, volunteers, participants or visitors.
- Except as may otherwise be provided herein, Waco ISD makes no expressed or implied warranties of any kind, to the fullest extent permissible under applicable law, Waco ISD disclaims all warranties, express or implied, including, but not limited to, warranties of performance, merchantability, fitness for a particular purpose, accuracy, omissions, completeness, and delays, except as expressly provided herein or as required by law, under no circumstances shall Waco ISD be liable for exemplary, special, punitive, consequential, or incidental damages, including, without limitation, lost profits, business revenue, or goodwill due to any cause whatsoever, even if Waco ISD has been advised of the possibility of such damages.
6. Indemnity. MCC and Waco ISD agree that both institutions shall indemnify, defend, and hold harmless each other as well as past, present, and future trustees, officers, and employees, from and against all claims, demands, causes of action, damages, costs, and expenses, including, without limitation, court costs and reasonable attorney's fees, of any kind or nature asserted by any third party, occurring or in any way incident to, arising out of, or in connection with any acts of MCC's participants, visitors, agents, employees, contractors, invitees, or licensees done in connection with this MOU. Both institution's obligations under this clause shall survive termination or expiration of this MOU.
7. Notice. All notices or other communications required or permitted hereunder shall be in writing, and shall be personally delivered or sent by registered or certified mail, return

receipt requested, courier delivery, electronic mail, facsimile or receipted overnight mail, and shall be deemed received upon the earlier of (a) the date of delivery, if personally delivered, or (b) three (3) business days after the date of posting by the U.S. postal service, if mailed. All such notices or communications shall be addressed as follows:

If to Waco ISD:

Superintendent
Waco Independent School District
501 Franklin Ave.
Waco, TX 76701

If to MCC:

Dr. Johnette McKown
President, McLennan Community College
1400 College Drive
Waco, TX 76708

Either party may change such address for notice for the party designated to receive such notice by giving written notice to the other party as provided in this paragraph.

8. Relationship of the Parties. It is understood and agreed that MCC is a separate legal entity from Waco ISD and MCC is not an employee, agent, joint venture, or partner of Waco ISD. Nothing in this Agreement shall be interpreted or construed as creating or establishing the relationship of employer and employee between Waco ISD and either MCC or any employee or agent of MCC.
9. No Waiver of Waco ISD's Immunity. The execution of this MOU and the performance by Waco ISD of any of its obligations hereunder are not, and are not intended to waive or relinquish, and Waco ISD shall not waive or relinquish, any governmental, sovereign immunity or defense from or to liability or prosecution available to Waco ISD, its trustees, officers, employees, or agents under federal or Texas laws.
10. No Third Party Beneficiaries. Nothing in this MOU shall be deemed or construed to create any third party beneficiaries or otherwise give any third party any claim or right of action against any party to this MOU.
11. Governing Law and Venue. This MOU shall be governed by and construed in accordance with the laws of the State of Texas, without regard to its conflicts of laws provisions. The mandatory and exclusive venue for the adjudication or resolution of any dispute arising out of this Agreement shall be in McLennan County, Texas.
12. Entire Agreement. This MOU and the attached and incorporated addendum or exhibits, if any, contain the entire agreement of the parties relative to the purpose(s) of the MOU and supersede any other representations, agreements, arrangements, negotiations, or understanding, oral or written, between the parties of this MOU.
13. Severability. In the event that any one or more of the provisions contained in this MOU shall for any reason be held to be invalid, illegal, or unenforceable in any respect, such invalidity, illegality, or unenforceability shall not affect any other provisions, and the

MOU shall be construed as if such invalid, illegal, or unenforceable provision had never been contained in it.

14. Interpretation. The parties agree that the normal rules of construction that require that any ambiguities in this MOU are to be construed against the drafter shall not be employed in the interpretation of this MOU.
15. Changes and Amendments. This MOU may be amended, modified, and/or supplemented only by the mutual agreement of the parties, in writing, to be attached to the incorporated in this MOU.
16. Assignment. Neither this MOU nor any rights, duties, or obligations under it shall be assignable by MCC without the prior written acknowledgment and authorization of Waco ISD. Any attempted assignment by MCC without Waco ISD's prior written consent shall be void.
17. No Waiver. No failure on the part of either party at any time to require the performance by the other party of any term hereof shall be taken or held to be a waiver of such term or in any way affect such party's right to enforce such term, and no waiver on the part of either party of any term hereof shall be taken or held to be a waiver of any other term hereof or the breach thereof. No waiver, alteration, or modification or any of the provisions of this MOU shall be binding unless in writing and signed by duly authorized representatives of the parties hereto.
18. Captions. The captions herein are for convenience and identification purposes only, are not an integral part hereof, and are not to be considered in the interpretation of any part hereof.
19. Counterparts. This MOU may be executed in separate counterparts, each of which when so executed shall be an original, but all of such counterparts shall together constitute but one and the same instrument.
20. Non-Discrimination. Neither McLennan Community College nor Waco ISD will discriminate on the basis of sex, age, handicap, race, color, and national origin in its educational and vocational programs, activities, or employment as required by Title IX, Section 504 and Title VI.

NOTICE: TEXAS COLLEGE BRIDGE PROGRAM

McLennan Community College has signed an MOU with Texas College Bridge and thereby supports compliance with HB 5 in this manner. Student scores from the Texas College Bridge program are delivered directly to the College to be utilized to determine readiness for college courses and to determine appropriate placement. TSIA scores are not necessary to determine college readiness for students who have completed the Texas College Bridge program satisfactorily.

Texas College Bridge is a program separate from the college prep agreement detailed above with a separate memorandum of understanding the district may sign with the state of Texas. Interested districts may find additional information at texascollegebridge.org.

WACO ISD
COURSE CROSSWALK 2023-2024

Updated: 02/25/2023

Signed:

Agreement Type: Dual Credit, PTECH, HB5 College Prep, Data Sharing

College Course	College Course Name	MEC Pathway or Credential	High School Course to be Articulated	Amount of High School HS Credit	Endorsement	Course for: Dual Credit, PTECH, ECCHS, PTECH, All
ACCT 2301	Principals of Financial Accounting	AAS, Accounting	13016800 Financial Analysis	1	Business & Industry	Dual Credit, PTECH
ACCT 2302	Principles of Managerial Accounting	AAS, Accounting	13016700 Accounting II	1	Business & Industry	Dual Credit, PTECH
ACNT 1303	Introduction to Accounting	AAS, Accounting	13016600 Accounting I	1	Business & Industry	Dual Credit, PTECH
ARTS 1301	Art Appreciation	Core	03500110 Art Appreciation	1	Arts & Humanities	Dual Credit, PTECH
ARTS 1303	Art History I	Core	03500110 Art I or 03500200 Art II or 03500300 Art III or 03500400 Art IV	1	Arts & Humanities	Dual Credit, PTECH
ARTS 1304	Art History II	Core	03500200 Art II or 03500300 Art III or 03500400 Art IV	1	Arts & Humanities	Dual Credit, PTECH
BCIS 1305	Business Computer Applications	Core	13011400 Business Information Management I	1	Business & Industry	Dual Credit, PTECH
BIOL 1322	Nutrition & Diet Therapy	AA, Field of Study in Nursing	13024500 Lifetime Nutrition and Wellness	0.5	Public Services	Dual Credit, PTECH
BIOL 1406	Biology for Science Majors	Core	13037200 Scientific Research & Design (A)*^	0.5	STEM	Dual Credit, PTECH

BIOL 1407	Biology for Science Majors II	Core	13037200 Scientific Research & Design (B)*^A	0.5	STEM	Dual Credit, PTECH
BIOL 1408	Biology for Non-Science Majors I	Core	13037200 Scientific Research & Design (A)*^A	0.5	STEM	Dual Credit, PTECH
BIOL 1409	Biology for Non-Science Majors II	Core	13037200 Scientific Research & Design (B)*^A	0.5	STEM	Dual Credit, PTECH
BIOL 2401	Anatomy and Physiology I	Core	13020600 Anatomy & Physiology (A)	0.5	STEM and Public Services	Dual Credit, PTECH
BIOL 2402	Anatomy and Physiology II	Core	13020600 Anatomy & Physiology (B)	0.5	STEM and Public Services	Dual Credit, PTECH
BIOL 2404	Anatomy and Physiology (specialized)	Core	13020600 Anatomy & Physiology or IHE11200 Science, Institution of Higher Education Endorsed	1	Public Service OR STEM	Dual Credit, PTECH
BIOL 2420	Microbiology for Non-Science Majors	Core	13020700 Medical Microbiology	1	STEM and Public Services	Dual Credit, PTECH
CHEM 1405	Chemistry for Non-Science Majors	Core	03040000 Chemistry or 13037201 Scientific Research & Design I*^A	1	STEM	Dual Credit, PTECH
CHEM 1411	General Chemistry I	Core	03040000 Chemistry (A) or 13037201 Scientific Research & Design I (A)*^A	0.5	STEM	Dual Credit, PTECH
CHEM 1412	General Chemistry II	Core	03040000 Chemistry (B) or 13037201 Scientific Research & Design I (B)*^A	0.5	STEM	Dual Credit, PTECH
COMM 1307	Intro to Mass Communication	Core	03241401 Contemporary Media	1	Foundation	Dual Credit, PTECH
CRIJ 1301	Intro to Criminal Justice	AA, Field of Study in Criminal Justice	13029300 Law Enforcement I	1	Public Services	Dual Credit, PTECH
CRIJ 1306	Court Systems and Practices	AA, Field of Study in Criminal Justice	13029600 Court Systems & Practices	1	Public Services	Dual Credit, PTECH
CRIJ 1310	Fundamentals of Criminal Law	AA, Field of Study in Criminal Justice	13028900 Federal Law Enforcement and Protective Services	1	Public Services	Dual Credit, PTECH
CRIJ 1313	Juvenile Justice System	AA, Field of Study in Criminal Justice	13030100 Practicum in Law, Public Safety, Corrections and Security	2	Public Services	Dual Credit, PTECH
CRIJ 2313	Correctional Systems and Practices	AA, Field of Study in Criminal Justice	13029700 Correctional Services	1	Public Services	Dual Credit, PTECH

CRIJ 2314	Criminal Investigations	AA, Field of Study in Criminal Justice	13029550 Criminal Investigations	1	Public Services	Dual Credit, PTECH
CRIJ 2328	Police Systems and Practices	AA, Field of Study in Criminal Justice	13029400 Law Enforcement II	1	Public Services	Dual Credit, PTECH
DRAM 1310	Introduction to Theater	Core	03250100 Theater I	1	Arts & Humanities	Dual Credit, PTECH
ECON 2301	Principles of Macroeconomics	Core	03310300 Economics with Emphasis on the Free Enterprise System	0.5	Multidisciplinary	Dual Credit, PTECH
ECON 2302	Principles of Microeconomics	Core	03310301 Economics Adv. Studies	0.5	Arts & Humanities	Dual Credit, PTECH
EDUC 1300	Learning Frameworks	Core	N1290050 College Transition	0.5	Foundation	Dual Credit, PTECH
EDUC 1301	Introduction to the Teaching Profession	AA, Teaching	N1300510 Communication and Technology in Education	1	Public Services	Dual Credit, PTECH
EDUC 2301	Introduction to Special Populations	AA, Teaching	(New Innovative Course) Teaching Strategies for Special Populations	1	Public Services	Dual Credit, PTECH
EMSP 1160	Clinical - EMT	EMT, Level 1 Certificate	13030100 Practicum in Law, Public Safety, Corrections, and Security	1	Public Services	Dual Credit, PTECH
EMSP 1173	EMS Agility & Fitness	EMT, Level 1 Certificate	PES00052 Foundations of Personal Fitness or; PES00053 Adventure/Outdoor Education or; PES00054 Aerobic Activities or; PES00055 Individual or Team Sports	0.5	Foundation	Dual Credit, PTECH
EMSP 1501	Emergency Medical Technician	EMT, Level 1 Certificate	N1303015 Emergency Medical Technician, Basic	0.5	Public Services	Dual Credit, PTECH
EMSP 2271	Simulation in Respiratory Care	EMT, Level 1 Certificate	12701500 Problem Based Research or; 12701510 Problem Based Research or; 1201520 Problem Based Research	1	Public Services	Dual Credit, PTECH
ENGL 1301	Composition I	Core	03220400 English IV (A)	0.5	Multidisciplinary	Dual Credit, PTECH

ENGL 1301	Composition I	Core	03220300 English III (A)	0.5	Multidisciplinary	Dual Credit, PTECH
ENGL 1302	Composition II	Core	03220400 English IV (B)	0.5	Multidisciplinary	Dual Credit, PTECH
ENGL 1302	Composition II	Core	03220300 English III (B)	0.5	Multidisciplinary	Dual Credit, PTECH
ENGL 2311	Technical & Business Writing	Core	03221100 Research & Technical Writing	1	Foundation	Dual Credit, PTECH
ENGL 2321	British Lit (I & II combined)	Core	03221800 Independent Study English I*	1	Foundation	Dual Credit, PTECH
ENGL 2322	British Literature I	Core	03221820 Independent Study English III	1	Foundation	Dual Credit, PTECH
ENGL 2326	American Lit (I & II combined)	Core	03221800 Independent Study English I*	1	Foundation	Dual Credit, PTECH
ENGL 2328	American Literature II	Core	03221600 Humanities	1	Foundation	Dual Credit, PTECH
ENVR 1101	Environmental Science I, Lab	Core	03020000 Environmental Systems	Local 1	STEM	Dual Credit, PTECH
ENVR 1301	Environmental Science I, Lecture	Core	03020000 Environmental Systems	1	STEM	Dual Credit, PTECH
GEO 1401	Earth Science Lecture and Lab	Core	03060200 Earth & Space Science	1	STEM	Dual Credit, PTECH
GEO 1403	Physical Geology (Lect & Lab)	Core	03060200 Earth & Space Science	1	STEM	Dual Credit, PTECH
GOVT 2305	Federal Government	Core	03330100 US Government	0.5	Multidisciplinary	Dual Credit, PTECH
GOVT 2306	Texas Government	Core	03380002 Special Topics in Social Studies I	0.5	Arts & Humanities	Dual Credit, PTECH
HIST 1301	United States History I	Core	03340100 US History A	0.5	Multidisciplinary	Dual Credit, PTECH
HIST 1302	United States History II	Core	03340100 US History B	0.5	Multidisciplinary	Dual Credit, PTECH
HIST 2321	World Civilizations I	Elective, AA-General Studies	03340400 World History Studies (A)	0.5	Arts & Humanities and Multidisciplinary	Dual Credit, PTECH
HIST 2322	World Civilizations II	Elective, AA-General Studies	03340400 World History Studies (A)	0.5	Arts & Humanities and Multidisciplinary	Dual Credit, PTECH
HPRS 1206	Essentials to Medical Terminology	AA, Field of Study in Nursing	13020300 Medical Terminology	1	Public Service	Dual Credit, PTECH

HUMA 1301	Introduction to Humanities I	Core	03221600 Humanities	1	Foundation	Dual Credit, PTECH
HUMA 1315	Fine Arts Appreciation	Core	03500110 Art Appreciation	1	Foundation	Dual Credit, PTECH
MATH 1314	College Algebra	Core	03101100 Pre-Calculus (A) or 03102500 Independent Study In Mathematics I (A)*	0.5	STEM	Dual Credit, PTECH
MATH 1316	Plane Trigonometry	Core	03101100 Pre-Calculus (B) or 03102500 Independent Study In Mathematics I (B)*	0.5	STEM	Dual Credit, PTECH
MATH 1324	Math for Business and Social Science	Core	13018000 Financial Mathematics	1	Foundation	Dual Credit, PTECH
MATH 1325	Calculus for Business and Social Science	Core	IHE11100 Mathematics, Institution of Higher Education Endorsed	1	STEM	Dual Credit, PTECH
MATH 1332	Contemporary Mathematics	Core	03102510 Advanced Quantitative Reasoning	1	STEM	Dual Credit, PTECH
MATH 1342	Elementary Statistical Methods	Core	03102530 Statistics	1	Foundation	Dual Credit, PTECH
MATH 1350	Mathematics for Teachers I	Core	03102500 Independent Study in Math I (A)*	0.5	STEM	Dual Credit, PTECH
MATH 1351	Mathematics for Teachers II	Core	03102500 Independent Study in Math I (B)*	0.5	STEM	Dual Credit, PTECH
MATH 2412	Pre-Calculus Mathematics	Core	IHE11100 Mathematics, Institution of Higher Education Endorsed	1	STEM	Dual Credit, PTECH
MATH 2413	Calculus I	Core	IHE11100 Mathematics, Institution of Higher Education Endorsed (A)	1	STEM	Dual Credit, PTECH
MATH 2414	Calculus II	Core	IHE11100 Mathematics, Institution of Higher Education Endorsed (B)	1	STEM	Dual Credit, PTECH
MUSI 1116	Sight Singing and Ear Training I	Core	03155400 Music Studies, Music Theory I (Sem A)	0.5	Arts & Humanities	Dual Credit, PTECH
MUSI 1311	Music Theory I	Core	03155400 Music Studies, Music Theory I (Sem B)	0.5	Arts & Humanities	Dual Credit, PTECH
MUSI 1181	Class Piano	Core	03154200 Music I, Piano I	1	Arts & Humanities	Dual Credit, PTECH
MUSI 1306	Music Appreciation	Core	03155600 Music Appreciation	1	Arts & Humanities	Dual Credit, PTECH
MUSI 1307	Music Literature	Core	03156400 Music Studies, Music and Media Communications I	1	Arts & Humanities	Dual Credit, PTECH
MUSI 1310	American Music	Core	03155700 Music Studies, Music Appreciation II	1	Arts & Humanities	Dual Credit, PTECH

PHIL 1301	Introduction to Philosophy	Core	0380002 Special Topics in Social Studies I*	0.5	Arts & Humanities and Multidisciplinary	Dual Credit, PTECH
PHYS 1401	College Physics I	Core	0305000 Physics (A) or Scientific Research and Design (A)*^A	0.5	STEM	Dual Credit, PTECH
PHYS 1402	College Physics II	Core	0305000 Physics (B) or Scientific Research and Design (B)*^A	0.5	STEM	Dual Credit, PTECH
PHYS 2425	University Physics I	Core	IHE11200 Science, Institution of Higher Education Endorsed~	1	STEM	Dual Credit, PTECH
PSYC 2301	General Psychology	Core	03350100 Psychology	0.5	Arts & Humanities	Dual Credit, PTECH
PSYC 2314	Lifespan Growth & Development	Core	13014300 Human Growth & Development	1	Public Service	Dual Credit, PTECH
PSYC 2319	Social Psychology	Core	0380002 Special Topics in Social Studies I*	0.5	Arts & Humanities and Multidisciplinary	Dual Credit, PTECH
SGNL 1401	Beginning ASL I	AAS, Interpreter Training	03980100 ASL I	1	Arts & Humanities and Multidisciplinary	Dual Credit, PTECH
SGNL 1402	Beginning ASL II	AAS, Interpreter Training	03980200 ASL II	1	Arts & Humanities and Multidisciplinary	Dual Credit, PTECH
SGNL 1403	Intermediate ASL I	AAS, Interpreter Training	03980300 ASL III	1	Arts & Humanities and Multidisciplinary	Dual Credit, PTECH
SGNL 1404	Intermediate ASL II	AAS, Interpreter Training	03980400 ASL IV	1	Arts & Humanities and Multidisciplinary	Dual Credit, PTECH
SOCI 1301	Introduction to Sociology	Core	03370100 Sociology	0.5	Arts & Humanities	Dual Credit, PTECH
SOCI 2336	Criminology	AA, Field of Study in Criminal Justice	N1303012 Forensic Psychology	1	Public Services	Dual Credit, PTECH
SPCH 1311	Introduction to Speech Communication	Core	03241400 Communication Applications	0.5	Foundation	Dual Credit, PTECH
SPCH 1315	Public Speaking	Core	03240900 Public Speaking I	1	Foundation	Dual Credit, PTECH
SPCH 1318	Interpersonal Communication	Core	03241200 Independent Study in Speech I*	1	Foundation	Dual Credit, PTECH

Waco Independent School District

Board of Trustee Meeting Agenda Item

Date: June 29, 2023

Contact Person: Dr. Susan Kincannon

RE: Cooper Foundation Trustee Election

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Background Information:

Seven individuals serve the community as unpaid trustees of the Cooper Foundation. Their responsibilities require a significant contribution of time and talent. Mr. Bill Nesbitt has served as a Cooper Foundation Trustee since 1986 and has recently resigned the position. To fill the vacancy, Cooper Trustees are recommending Reverend Leslie King, Pastor of the First Presbyterian Church in Waco. Reverend King is a well-respected community leader who has been involved in numerous community service projects and is highly respected by her parishioners and her peers in the ministry. Cooper Trustees believe that her experience would be beneficial to the Cooper Foundation.

Waco ISD is a beneficiary of the philanthropy of the Cooper Foundation, and by virtue of the Foundation's governing instrument, has a role in the selection process of certain Cooper Foundation board members. Under the Foundation's trust instrument, the vote is to be cast by the governing body and communicated to the Cooper Foundation in Writing.

Fiscal Implications

Not Applicable.

Administrative Recommendation(s):

Approve the Board of Trustee's vote for Reverend Leslie King for Trustee of the Cooper Foundation.

Waco Independent School District

Board of Trustee Meeting Agenda Item

Date: June 29, 2023

Contact Person: M. Tish

**RE: Purchases over \$50,000 Under Pre-Existing Bid, Purchasing Cooperative,
or Allowed Professional Service**

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Background Information:

In April 2020, the Board approved a change in Board Policy CH (Local) that requires all purchase requests over \$50,000 to be approved by the Board of Trustees prior to being made. These purchases will be made under a pre-existing bid or purchasing cooperative. The following purchase requests have been made as of June 27, 2023:

Pre-Existing Bid:

- DLR Group Inc of Texas - \$80,302.00 - Support district and campus leadership in successfully implementing change while also empowering educators to fully leverage their new facilities at G.W. Carver Middle School - RFP# 21-1182 Professional Development
- Warren Instructional - \$63,750 – For professional development - Waco ISD Bid# 22-1220 Instructional Support Provider for Literacy Training
- Emergent Tree - \$162,461 - District-wide Tier 1 and Tier 2 Behavior Training & Support - Waco ISD Bid# 21-1182 Educational Consulting
- Heinemann (Greenwood Publishing Group, LLC) - \$346,409.60 – Elementary shared reading sets for Kindergarten through 3rd Grade – RFP# 21-1200

Purchasing Cooperative:

- Window Film Depot Inc. - \$237,951.35 –District Wide furnish and install 3M clear S80 (8mil) security film – TIPS Purchasing Cooperative Contract #220101, Safety Equipment, Supplies and Services
- Integrity ONE Solutions - \$63,746.61 –District Wide exterior doors hardware improvement – TIPS Purchasing Cooperative Contract #230202, Security Systems Products and Services
- ZSpace - \$150,048.00 - Augmented Reality computer lab for G. W. Carver Middle School - TIPS Purchasing Cooperative Contract #200105, Technology Solutions Products and Services
- Computer Solutions Inc. - \$54,772.00 - Printers for G. W. Carver Middle School – Epson Texas DIR TSO Contract #4160 for HP

- 2nd Gear - \$231,025.23 - Chromebooks for Transformation Zone Campuses - TIPS Purchasing Cooperative Contract #230105, Technology Solutions Productions and Services
- ZSpace - \$57,203.96.00 - Augmented Reality computer lab for Transformation Zone Elementary Labs - TIPS Purchasing Cooperative Contract #200105, Technology Solutions Products and Services
- Finalsight - \$63,609.00 – Website Provider and AudioEye services for ADA compliance – TIPS Purchasing Cooperative Contract #220701, Web Hosting, Services or Content Management
 - \$5,000 Start-up fee
 - \$58,609 Year 1 fee

Fiscal Implications:

The cost of these goods and services will be charged to the appropriate departmental budget.

Administrative Recommendation(s):

The Administration recommends that the Board of Trustees approve the purchase requests over \$50,000, as presented.

Waco Independent School District

Board of Trustee Meeting Agenda Item

Date: June 29, 2023

Contact Person: Jerry Allen

RE: Low Attendance Waivers

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Background Information

Districts and/or campuses can request a waiver to excuse instructional days from Average Daily Attendance (ADA) and Foundation School Program (FSP) funding calculations that have attendance at least ten percentage points below the last school year's (2021-2022) overall average attendance 88.33%, for the district or applicable campus, due to inclement weather, health, or safety-related issues.

Fiscal Implications

If TEA grants the waiver for a low attendance day, the district will not include the day as a day of membership or instruction. The day will be considered a non-school day in our district's student attendance accounting system and will not be reported as a school day in PEIMS reporting, increasing the district's overall ADA.

The Administration seeks to submit a waiver for the following days:

- September 14, 2022 – due to the hoax shooting threat at Waco High School. The campus's attendance rate was 73.06% compared to 88.33% for the overall attendance in the previous year (2021–2022).
- February 2, 2023 – due to a late start for bad weather/ice. The district's attendance rate was 70.84% compared to 88.33% for the overall attendance in the previous year (2021–2022).

Administrative Recommendation(s):

Approve the submittal of Low Attendance Waivers as presented.

Waco Independent School District
Board of Trustees Meeting Agenda

Date: June 29, 2023

Contact Person: Dr. Daniel Lopez

RE: Approval of Administrator Contracts

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Background Information:

According to policy DC (Local), the Board retains final authority for the employment of all contracted administrative personnel.

Principals:

Kristie Ingram is recommended for principal at Bell's Hill Elementary School. Mrs. Ingram has 17 years of experience in education with more than ten years of experience as an assistant principal. She most recently served as an assistant principal in Midway ISD. Mrs. Ingram has a bachelor's degree from Abilene Christian University and a master's degree from Lamar University in Educational Administration.

Barba Elaine Nelson is recommended for principal at Parkdale Elementary School. Mrs. Nelson has 24 years of experience in education. She has four years of experience as a campus principal. She was most recently a curriculum coordinator in Fairfield ISD. Mrs. Nelson has a bachelor's degree from Texas A&M University and a master's degree in Educational Leadership from The University of Texas at Tyler.

Assistant Principals:

Takeisha Albertie is recommended for assistant principal at Waco High School. Mrs. Albertie has 17 years of experience in education. She has held various positions including mentor, department lead, coach, advancement via individual determination coordinator (AVID), instructional specialist, and assistant principal. Her most recent assignment was assistant principal at Killeen High School.

Amy Atnip is recommended for assistant principal at Dean Highland Elementary. Mrs. Atnip has 8 years of experience education. She has served as a teacher and instructional specialist/multi-classroom leader at Kendrick Elementary. She most recently was an assistant principal in Midway ISD.

Julie Biezenski is recommended for assistant principal at Waco High School. Mrs. Biezenski has 18 years of experience in education with 5 of those years spent as an administrator within the field of special education including coordinator of transition services. She has held positions of specialist for the low-incident program and co-teacher for English/Language Arts and World Geography in Midway ISD.

Dr. Bianca McVade is recommended for assistant principal at Tennyson Middle School. Dr. McVade has 7 years of experience in education. She most recently served as a math and science curriculum coordinator in Copperas Cove ISD.

Odis Robinson is recommended for assistant principal at G.L. Wiley Opportunity Center. Mr. Robinson has been a teacher in Killeen ISD for the past three years. Before joining the profession, he served 22 years of honorable service in the U.S. Army in positions ranging from Platoon Leader to Operations Officer and Company Commander.

Dennise Wooden is recommended for associate principal at University High School. Mrs. Wooden has 16 years of experience in education. Her experiences include middle school teacher, instructional specialist, and assistant principal. She has most recently served as the curriculum director at Chaparral High School in Killeen ISD.

Fiscal Implications:

Salary is included in the 2023-2024 fiscal year budget.

Administrative Recommendation:

Approve administrative contract recommendations as presented.

Waco Independent School District

Board of Trustee Meeting Agenda

Date: June 29, 2023

Contact Person: Dr. Daniel Lopez

RE: Retention Bonuses for Special Education and Other Campus Support Professionals, Athletic Trainers, and Registered Nurses

Background Information:

The Board has previously approved retention incentives using Elementary and Secondary School Emergency Funds (ESSER) for a number of positions to address the ever-changing economic climate. The Administration's last request for bonuses was at the April 2023 Regular meeting.

Summer hiring challenges include special education professional staff, which are resulting from increased caseloads and pay rates of private providers who are hiring for these specialized positions. These positions include Diagnosticians, Speech Pathologists, Speech Assistants, Board Certified Behavior Analysts (BCBA), LSSPs, Occupational Therapists, and ARD Facilitators. These positions were not previously awarded retention bonuses.

In addition to special education, there are several other valuable employee positions who have not received retention bonuses including registered nurses, high school testing administrators, at-risk and CCMR specialists, and athletic trainers.

In order to retain these employees, a one-time retention bonus is recommended for those returning for the 2023-2024 school year. To be eligible for the bonus, the employee must have a hire date of on or before April 1, 2023, return in the same position/job classification for the 2023-2024 school year, and be fully employed on the day of the payout. Temporary employees are not eligible.

- A \$2,500 retention bonus for all regularly employed Special Education campus support positions including Diagnostician, ASHA Speech Language Pathologist, Speech Language Pathologist Assistant, Board Certified Behavior Analyst (BCBA), Licensed Specialist in School Psychology (LSSP), Occupational Therapist, and ARD Facilitator.
- A \$2,500 retention bonus for all regularly employed High School campus support professional positions (non-instructional) including Registered Nurse; Campus Testing Specialist, At-Risk Specialist, College Career and Military Readiness (CCMR) Specialist, and Athletic Trainer.

Role	#	Payout	Total Payout
Speech Pathologist	8	\$2,500	\$20,000
Speech Pathologist Asst.	6	\$2,500	\$15,000
Diagnostician	15	\$2,500	\$37,500
BCBA	1	\$2,500	\$2,500
LSSP	2	\$2,500	\$5,000
Occupational Therapist	1	\$2,500	\$2,500
ARD Facilitator	8	\$2,500	\$20,000
Athletic Trainer	2	\$2,500	\$5,000
HS Testing Specialist	1	\$2,500	\$2,500
HS At-Risk Specialist	1	\$2,500	\$2,500
CCMR Specialist	2	\$2,500	\$5,000
Registered Nurse (RN)	9	\$2,500	\$22,500
Total	56	\$2,500	\$140,000

Fiscal Implications:

The estimated cost of the proposed retention bonuses is \$140,000. Bonuses will be paid to employees in August 2023, prior to the September 30, 2023, closeout of ESSER II grant funds.

Administrative Recommendations:

Approve retention bonuses as presented.

Waco Independent School District

Board of Trustee Meeting Agenda Item

Date: June 30, 2023

Contact Person: Gloria Barrera

RE: Allowance Expenditure Authorization #6 to Change the Building Automation System Supplier/Installer for the New Waco High School

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Background Information:

As Rogers O'Brien Construction has progressed through the procurement process for Waco High School, it was discovered that the Building Automation System (BAS) contractor is unable to meet Waco ISD's specification or performance criteria. Early in the process, Rogers O'Brien confirmed that the proposed BAS contractor could meet the specifications and was assured that they were able to and that they would comply. However, recently, the BAS contractor withdrew their bid, which required the contractor to move to the next best value proposal. This represents a total cost impact to the project of \$318,483.

The Guaranteed Maximum Price approved by the Board on September 29, 2022, included a contingency allowance to address unforeseen expenses of this type. Additionally, Rogers O'Brien is aggressively pursuing other cost reduction strategies and has offset this cost impact by \$75,297 to make the actual cost impact \$243,186.

O'Connell Robertson's engineer, Bath & Associates (Commissioning agent), and Waco ISD have reviewed the proposed cost and find it to be acceptable.

Fiscal Implications

Funding for the additional \$243,186 in costs associated with this change will come from the Contingency Allowance included in the project contract. This does not increase the Guaranteed Maximum Price for the project or change the project schedule.

Administrative Recommendation(s):

Approve Allowance Expenditure Authorization (AEA) #6 for costs associated with changing the Building Automation Controls System supplier/installer to achieve the desired specification and performance and authorize the Superintendent to execute the AEA.



ALLOWANCE EXPENDITURE AUTHORIZATION (AEA)

WACO ISD

Construction Department

Date: 6/23/2023

ALLOWANCE FUND: CONTRACTOR CONTINGENCY

Project: Replacement Waco High School

AEA#: 6

To: **Rogers-O'Brien Construction**

Re: **PCO #S 1008 & 1015**

You are authorized to perform the following item(s) of work and to adjust the Allowance Sum accordingly:

PCO# 1008 PR 007 and Added VE (Insulation Substitution Deduct) -(\$75,297.00)

PCO# 1015 BAS Revised Controls - \$318,483.00

***GMP 02 Contractor Contingency**

THIS IS NOT A CHANGE ORDER AND DOES NOT INCREASE OR DECREASE THE CONTRACT AMOUNT OR CONTRACT TIME

Beginning Allowance Balance	1,500,000.00
Allowance Expenditures prior to this Authorization	-
Allowance will be (Increased) Decreased by this Authorization	243,186.00
<i>*amounts that increase allowance should be shown as negative</i>	
New Allowance Balance	1,256,814.00

O'Connell Robertson
ARCHITECT *(Firm name)*

Rogers-O'Brien Construction
CONTRACTOR

Waco ISD
OWNER *(Firm name)*

SIGNATURE

SIGNATURE

SIGNATURE

Jaiy Braulick, CA
PRINTED NAME AND TITLE

John Eggeling, Senior Project Manager
PRINTED NAME AND TITLE

Dr. Susan Kincannon, Superintendent
PRINTED NAME AND TITLE

6/26/23
DATE

6/23/23
DATE

DATE
DATE

☐ Attachments
Current AEA Log
PCO's

(35 pages)



Rogers-O'Brien CONSTRUCTION

PCO #1008

Rogers-O'Brien Construction
3901 S Lamar Boulevard Suite 200
Austin, Texas 78704
Phone: (512) 486-3800
Fax: (512) 486-3701

Project: 212053 - Waco High School
2020 N 42nd Street
Waco, Texas 76710

CE #023 - Added VE and PR007 D

TO:	Waco Independent School District 501 Franklin Avenue Waco, Texas 76701	DATE:	2/23/2023
PCO NUMBER/REVISION:	1008 / 0	TOTAL AMOUNT:	\$0.00
SCHEDULE IMPACT:			

POTENTIAL CHANGE ORDER DESCRIPTION:

CE #023 - Added VE and PR007 Deduct

PCO 1008 COST SAVINGS TO BE TRANSFERED FROM BUYOUT SAVINGS AFTER APPROVAL VIA AEA

ATTACHMENTS:

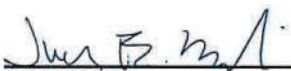
[LPPCO 002 PR07 Sent to GC REVISED.pdf](#) , [_PCO #1008 - Added VE and PR007 Deduct - Pricing Recommended.pdf](#) , [_CO - PR007 Collier Deduct.pdf](#) , [_07 21 00 - Thermal Insulation Substitution Request - NO EXCEPTIONS TAKEN DEDUCT NEEDED.pdf](#)

#	Subcontractor	Description	Amount
1	L.S. Decker, Inc. Hou	Insulation Substitution Deduct - Roxul Cavityrock in lieu of Atals EnergyShield Pro	\$(38,850.00)
2	Leland Collier Electric Co.	PR007 Deduct	\$(19,669.00)
3	Lochridge-Priest Inc.	PR007 Deduct - Resized AHU's, Added Dampers, Adj. Controls Scope	\$(16,778.00)
4		PR007 Deduct and Insulation Substitution VE	\$75,297.00
Grand Total:			\$0.00

Jaiy Braulick (O'Connell Robertson)
811 Barton Springs Rd, Suite 900
Austin, Texas 78704

Waco Independent School District
501 Franklin Avenue
Waco, Texas 76701

Rogers-O'Brien Construction Company
1901 Regal Row
Dallas, Texas 75235


SIGNATURE DATE 4/13/23


SIGNATURE 622 DATE


SIGNATURE DATE 4/13/2023



Rogers-O'Brien CONSTRUCTION

PCO #1015

Rogers-O'Brien Construction
3901 S Lamar Boulevard Suite 200
Austin, Texas 78704
Phone: (512) 486-3800
Fax: (512) 486-3701

Project: 212053 - Waco High School
2020 N 42nd Street
Waco, Texas 76710

CE #034 - BAS Revised Controls

TO: Waco Independent School District
501 Franklin Avenue
Waco, Texas 76701

DATE: 5/12/2023

PCO NUMBER/REVISION: 1015 / 0

TOTAL AMOUNT: \$0.00

SCHEDULE IMPACT:

POTENTIAL CHANGE ORDER DESCRIPTION:

CE #034 - BAS Revised Controls

Revised Controls Sequence per ASI 015

*To be paid from GMP 2 Owner Contingency

***Waco High School specifications listed Enviromatic as an approved BAS vendor however since then they have been removed from the specifications in WISD due to a recurring issue with their integration and graphics software not being compatible. This is the vendor our low bidder LPI had included in their contract amount. We had all three other vendors allowed per specifications rebid through all the current contract documents. This Change order is the cost difference to buy up to the next place bidder which is TEAMS.

ATTACHMENTS:

[HC220285 - LPPCO Controls Rev 1.pdf](#)

#	Subcontractor	Description	Amount
1	Lochridge-Priest Inc.	Revised BAS	\$318,483.00
2		Revised BAS	\$(318,483.00)
Subtotal:			\$0.00
Bond:			\$0.00
Grand Total:			\$0.00

Jaiy Braulick (O'Connell Robertson)

811 Barton Springs Rd, Suite 900
Austin, Texas 78704

Waco Independent School District

501 Franklin Avenue
Waco, Texas 76701

Rogers-O'Brien Construction Company

1901 Regal Row
Dallas, Texas 75235


SIGNATURE

5/22/23
DATE

623
SIGNATURE

DATE


SIGNATURE

5/16/2023
DATE



TACLA28343C

M-41036

Price Change Order # 003

Date: May 3, 2023

To: **Rogers O'Brien**
3901 S. Lamar Blvd., Ste. 200
Austin, TX 78704

Job Name: **Waco High School**

Attn: **Johnathan Eggeling**

Job Location: 2020 N. 42nd. Street
Waco, TX 76710

LP Job #: **HC220285**

Reference: **ASI 015 REVISED controls sequence**

Please (add/deduct) the amount below to (install/remove) the items listed in the breakout sheet (attached) as per comments from (GC, Architech, Engineer) to specifications listed. Please note: this changes will not take effect until Lochridge Priest receives a notice to proceed or a Contract Change Order.

Total: **\$318,483.00**

Add For Bond

Number of Days Added to Schedule for this work: 0

Exclusions: Bond, overtime and original contract exclusions.

By:

Ralph Reynolds
Senior Vice President

Please Note: Lochridge Priest has the right to reprice this change order in the event that the supplied information is incorrect or differs from the actual field situation.

Lochridge Priest

HVAC & PLUMBING SHORT RECAP					PRINT TIME: 5/3/2023 13:25			
JOB NAME:					BID DATE:			
LOCATION:					EST. NO.:			
LABOR RATE: \$ 50.00		MAN HRS		EQUIP \$	MAT'L \$	LABOR \$	SUB-MISC	
MCA %: 100%		UNIT HRS	EXT HRS					
P L U M B I N G	QUAN	DESCRIPTION						
	1			0	0	\$ -	\$ -	
	1			0	0	\$ -	\$ -	
	1	-		0	0	\$ -	\$ -	
	1	-		0	0	\$ -	\$ -	
	1	-		0	0	\$ -	\$ -	
	1	-		0	0	\$ -	\$ -	
	1	-		0	0	\$ -	\$ -	
	1	20% ADD FOR MED. GAS. PIP	0	0	\$ -	\$ -		
	1	10% ADD FOR DOM. WTR. PIP	0	0	\$ -	\$ -		
	-	TAG & ID	-	0	\$ -	\$ -		
	-	TESTING 10.0%	-	0	\$ -	\$ -		
-	SUPERVISION 10.0%	-	0	\$ -	\$ -			
PLUMBING TOTALS				0	\$ -	\$ -	\$ -	
P I P I N G	QUAN	DESCRIPTION						
	1	-		0	0	\$ -	\$ -	
	1	-		0	0	\$ -	\$ -	
	1	-		0	0	\$ -	\$ -	
	1	-		0	0	\$ -	\$ -	
	1	-		0	0	\$ -	\$ -	
	1	-		0	0	\$ -	\$ -	
	1	-		0	0	\$ -	\$ -	
	1	10% ADD FOR 1" & DOWN PIP	0	0	\$ -	\$ -		
	-	TAG & ID	-	0	\$ -	\$ -		
	-	SUPERVISION 10.0%	-	0	\$ -	\$ -		
	PIPING TOTALS				0	0	0	0
S H E E T M E T A L	#S OF DUCT: 0				\$ -			
	LABOR RATES				\$ -			
	\$ 45.00	SHOP	-	0	\$ -	\$ -		
	\$ 45.00	HANDLING	-	0	\$ -	\$ -		
	\$ 45.00	FIELD	-	0	\$ -	\$ -		
	QUAN	DESCRIPTION						
		Sheetmetal Shop Expense					\$ -	
	1	20% FIELD CORR. FACTOR	0	0	\$ -	\$ -	\$ -	
	1	-	0	0	\$ -	\$ -	\$ -	
	1	-	0	0	\$ -	\$ -	\$ -	
	1	-	0	0	\$ -	\$ -	\$ -	
	1	-	0	0	\$ -	\$ -	\$ -	
1	-	0	0	\$ -	\$ -	\$ -		
-	SUPERVISION 10.0%	-	0	\$ -	\$ -	\$ -		
SHEETMETAL TOTALS				0	\$ -	\$ -	\$ -	
HVAC TOTALS				0	\$ -	\$ -	\$ -	
S U B & M I S C	LINE	DESCRIPTION	VENDOR				SUBCONTRACTOR	
	1	INSULATION			\$ -	\$ -	\$ -	
	2	TEMP CONTROLS			\$ -	\$ -	289,530	
	3				\$ -	\$ -	\$ -	
	4				\$ -	\$ -	\$ -	
	5	-			\$ -	\$ -	\$ -	
	6	-			\$ -	\$ -	\$ -	
	7	CLEAN UP CREW	2.0%		\$ -	\$ -	\$ -	
	8	EQUIPMENT RENTAL					\$ -	
	9	SU; T & B ; G & A				\$ -	\$ -	
	-	SMALL TOOL/MISC MTL/WARRANTY			\$ -	\$ -	\$ -	
	SUB & MISC. TOTALS					\$ -	\$ -	289,530
M I S C	STARTUP LABOR RATE: \$ 90.00		SUMMARY					
	EQUIPMENT ADJUSTMENT: \$ -			HVAC	SUB & MISC.	PLUMBING	TOTALS	
	WARRANTY %: 4%		EQUIP	\$ -	\$ -	\$ -	\$ -	
	MISC. MATERIAL %: 17%		MATL	\$ -	\$ -	\$ -	\$ -	
			LABOR	\$ -	\$ -	\$ -	\$ -	
	DESCRIPTION:		S/M	\$ -	289,530	\$ -	289,530	
			TAX	\$ -	\$ -	\$ -	\$ -	
			COST	\$ -	289,530	\$ -	289,530	
			GEN. COND.	\$ -	\$ -	\$ -	\$ -	
			SUBTOTAL	\$ -	289,530	\$ -	289,530	
			FEE	\$ -	28,953	\$ -	28,953	
			BID W/O BOND	\$ -	318,483	\$ -	318,483	
			PERF. BOND				\$ -	
			JOB TOTAL BID	625			\$ 318,483	
			% M/U v LABOR	0.0%	0.0%	0.0%	0.0%	

**WACO INDEPENDENT SCHOOL DISTRICT
BOARD MEETING MINUTES**

Special Meeting, May 16, 2023 - 6:00 p.m.
WISD Administration Offices Board Room

BOARD MEMBERS PRESENT

Stephanie Korteweg
Jonathan Grant

BOARD MEMBERS ABSENT

Jose Vidana
Jeremy Davis
Keith Guillory
Angleo Ochoa

When canvassing an election, only two board members are needed to form a quorum.

CALL TO ORDER

Stephanie Korteweg, Board President, called the meeting of the Waco Independent School District Board of Trustees to order at 12:04 p.m. She stated that a quorum of Board Members was present, that the meeting had been duly called, and that the notice of the meeting had been posted in accordance with the Texas Open Meetings Act, Texas Government Code Chapter 551.

PUBLIC COMMENTS ON AGENDA ITEMS

None

**CONSIDER, DISCUSS AND TAKE APPROPRIATE ACTION REGARDING
CANVASSING THE VOTES FROM THE MAY 6, 2023 BOARD OF TRUSTEES
ELECTION**

Elizabeth Cox, Chief of Staff, presented the results of the May 6, 2023, Board of Trustees Election.

Stephanie Korteweg made a motion, seconded by Jonathan Grant, to approve the canvassing of the votes from the May 6, 2023, Board of Trustees Election. The motion carried unanimously (2-0).

Following Section 67.004 of Texas Election Code, a quorum of board members has completed and approved the canvass of the May 6, 2023 Waco ISD Board of Trustees Election Results.

ADJOURNMENT

The meeting was adjourned at 12:07 p.m.

**WACO INDEPENDENT SCHOOL DISTRICT
BOARD MEETING MINUTES**

Regular Meeting, May 18, 2023 - 6:00 p.m.
WISD Administration Offices Board Room

BOARD MEMBERS PRESENT

Stephanie Korteweg
Jose Vidana
Jeremy Davis
Keith Guillory
Angelo Ochoa
Jonathan Grant
Jim Patton - After Oath of Office

BOARD MEMBERS ABSENT

None

CALL TO ORDER

Stephanie Korteweg, Board President, called the meeting of the Waco Independent School District Board of Trustees to order at 6:00 p.m. She stated that a quorum of Board Members was present, that the meeting had been duly called, and that the notice of the meeting had been posted in accordance with the Texas Open Meetings Act, Texas Government Code Chapter 551.

OATH OF OFFICE

The Oath of Office was administered to new board member Jim Patton. The Oath of Office was also administered to returning board members Jose Vidana and Angelo Ochoa.

PUBLIC COMMENTS ON AGENDA ITEMS

None

MOMENT OF SILENCE AND PLEDGE OF ALLEGIANCE

**CONSIDER, DISCUSS AND TAKE APPROPRIATE ACTION REGARDING THE
REORGANIZATION OF THE BOARD OF TRUSTEES**

President

Angelo Ochoa made a motion, seconded by Jose Vidana, to elect Stephanie Korteweg as Board of Trustees President. The motion carried unanimously (7-0).

Vice President

Jonathan Grant made a motion, seconded by Angelo Ochoa, to elect Jose Vidana as Board of Trustees Vice President. The motion carried unanimously (7-0).

Secretary

Keith Guillory made a motion, seconded by Stephanie Korteweg, to elect Jeremy Davis as Board of Trustees Secretary. The motion carried unanimously (7-0).

SPECIAL RECOGNITIONS

Pledge Leaders

Eddy Favela and Alyson Roque-Ramirez, students from Crestview Elementary School, led the Pledge of Allegiance.

Dell Scholar

Lili Bien, Waco High School student, was recognized as a Dell Scholar. The Dell Scholar program provides a support system for students pursuing a degree. Scholars receive:

- \$20,000 Scholarship
- Personalized support for academic, financial and emotional life challenges
- A laptop computer
- \$500 in Textbook Credits for four years
- Scholars Resource Network
- Access to Tele-Therapy Sessions

UIL State Theatrical Design Contest

The UIL State Theatrical Design Contest was held in early May at the Round Rock Performing Arts Center. Waco High School had three students selected to present their work at the state level.

- Costume Design - Claire Prather
- Costume Design - Helen Goodman
- Scenic Design - Lily Howell

State UIL One-Act Honor Crew

Waco High School had two students selected:

- Eleanor Rhodes
- Andrew Eggers

Community Partner Award

The Educational Service Center, Region 12, was recognized as the Outstanding Community Partner of the month.

SUPERINTENDENT'S REPORT

Education Foundation Enrichment Grants

Dr. Kincannon reported that the Waco Education Foundation awarded a record \$154,995 to 46 teacher grant recipients. This brings the total amount of grants funded over the past decade and a half to more than \$2.15 million.

Legislative Update

Dr. Kincannon shared the latest legislative updates. The Board will hear more about the outcomes of the Legislative Session at the Summer Leadership Conference in June in Fort Worth.

Graduation

Waco High School's graduation ceremony begins at 7:30 on Thursday, May 25.
University High School's graduation ceremony is scheduled for 8:00 on Friday, May 26.
Both ceremonies will held at the Waco ISD Stadium

On May 30, at 6:00, Brazos will hold its graduation ceremony at Antioch Community Church.

Family Fest

The Annual Back-to-School Family Fest is scheduled on Saturday, August 5, 2023, from 9:00am - 12:00pm. Because of construction around Waco High School, University High School will serve as the location for a single event.

INFORMATION ITEMS/REPORTS

- Monthly Financial Reports for the Period Ended April 30, 2023
- High-Quality Early Childhood Program Update

CONSENT AGENDA:CONSIDER AND TAKE APPROPRIATE ACTION

- Amendments to the 2022-2023 Budget
- Bid Award for Administrative Services (ASO) for Medical Health Plan, Pharmacy Benefits Management (PBM), or Fully-Insured Medical Insurance Option
- Bid Award for Bank Depository Services
- Bid Award for Educational Consulting, Professional Development, and Other Student-Based Contracted Services
- Bid Award for Maintenance Supplies, Equipment, and Services
- Bid Award for Restaurant & Catering Services
- Purchases over \$50,000 under Pre-Existing Bid, Purchasing Cooperative, or Allowed Professional Service
- Instructional Materials Allotment, TEKS Certification for the 2023-2024 School Year

- Renewal of the Bid Award and Amendment to the Transportation Services Agreement for the 2023-2024 School Year
- Innovative Course Approval
- Optional Flexible School Day Program Renewal Application
- Waiver to use Alternate Reading Diagnostic Instruments
- New Construction Utility Easement - Waco High School
- School District Teaching Permit for Selected Teacher Candidate to Teach a Non-Core Academic CTE Course
- Board of Trustees Meeting Minutes
 - Regular Meeting - April 27, 2023

Jose Vidana made a motion, seconded by Keith Guillory, to approve the Consent Agenda as presented. The motion carried unanimously (7-0).

REVIEW, DISCUSS AND TAKE APPROPRIATE ACTION REGARDING THE SCHEMATIC DESIGN OF KENDRICK ELEMENTARY SCHOOL

Jarrold Sterzinger and Doug Dawson presented the schematic design for Kendrick Elementary School.

Jonathan Grant made a motion, seconded by Jose Vidana, to approve the Schematic Design of Kendrick Elementary School. The motion carried unanimously (7-0).

REVIEW AND DISCUSS REQUIRED DISTRICTWIDE INTRUDER DETECTION AUDIT REPORT FINDINGS

Dr. Kincannon shared the Districtwide Intruder Detection Audit Report Findings for Parkdale Elementary and South Waco Elementary. She stated a corrective action plan is being implemented in compliance with the TxSSC.

ANNOUNCEMENTS

Elizabeth Cox, Chief of Staff, made the following announcements:

- Waco High School Graduation is Thursday, May 25 at 7:30 p.m.
- University High School Graduation is Friday, May 26 at 8:00 p.m.
- Brazos Graduation is Tuesday, May 30 at 6:00 p.m. It will be held at Antioch Community Church.
- The Waco High School Spring Football game will be held Friday, May 19, at 6:00 p.m.
- The University High School Spring Football game is being held tonight.
- Cesar Chavez Middle School's production of Annie Jr is Saturday at 2:30 p.m.
- Tuesday, May 23, at 11:00 a.m. is the Outstanding Teachers Banquet

- Wednesday, May 24, at 11:00 a.m. is the Retirement Celebration for Retiring Waco ISD Employees
- The Elementary District Science Fair is May 24, at 6:00 p.m.

CONSIDERATION OF PERSONNEL

- Deliberate the Appointment, Employment, Evaluation, Reassignment, Duties, Discipline, or Dismissal of a Public Officer or Employee
- Hear a Complaint or Charge Against an Officer or Employee

The Board convened in closed session at 7:06 p.m.

The Board reconvened at 9:00 p.m.

ADJOURNMENT

The meeting adjourned at 9:00 p.m.

Waco Independent School District

Board of Trustee Meeting Agenda Item

Date: June 29, 2022

Contact Person: Sheryl Davis

RE: Review and Discuss the Sale of Unlimited Tax Building Bonds, Series 2023

=====

Background Information:

As authorized by the voters on November 2, 2021 and approved by the Board of Trustees on August 11, 2022, the Waco Independent School District has issued the last of the authorization with \$80 million in Unlimited Tax Building Bonds, Series 2023. The sale of those bonds occurred on Wednesday, April 19, 2023 and closed on May 16, 2023.

The bonds were issued at a par amount of \$78,455,000 at a premium of \$2,262,988.90. This premium generates additional project funds as well as funds to cover the underwriter's discount, issuance costs and excess proceeds of \$717,988.90. The total amount received for project costs is \$80,000,000.

Fiscal Implications:

The Unlimited Tax Building Bonds, Series 2023, will fund a portion of the projects approved by the voters in the November 2, 2021 election.

Administrative Recommendation(s):

The District's Financial Advisor, Robert "Dusty" Traylor, of RBC Capital Markets, will present a summary of the bond sale.

Waco Independent School District

\$80,000,000 Project Deposit

\$78,455,000 Unlimited Tax School Building Bonds, Series 2023

Pricing Date:
April 19, 2023



**Capital
Markets**

R. Dustin Traylor
Managing Director

RBC Capital Markets, LLC
303 Pearl Parkway
Suite 220
San Antonio, TX 78215

Tel: (210) 805-1117
Fax: (210) 805-1119

robert.d.traylor@rbccm.com

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Transaction Overview



Unlimited Tax School Building Bonds, Series 2023

Financing Overview

Issuer	Waco Independent School District
Par Amount	\$78,455,000.00
Project Deposit	\$80,000,000.00
Issue	Unlimited Tax School Building Bonds, Series 2023
Pricing Date	April 19, 2023
Delivery Date	May 16, 2023
First Coupon	15-Feb-24
Type of Sale	Negotiated
Tax Status	Tax-Exempt
Optional Redemption	48,441.0000
Ratings	Underlying: Moody's: "Aa2" PSF Enhanced: Moody's "Aaa"
Arbitrage Yield	3.99%
All-In-TIC:	4.11%
Financial Advisor	RBC Capital Markets
Bond Counsel	Bracewell LLP
Underwriters' Co-Counsel	Orrick, Herrington & Sutcliffe LLP
Underwriters' Co-Counsel	Perez Law Firm PLLC
Senior Manager	Oppenheimer & Co.
Co-Manager	Robert W. Baird & Co.
Co-Manager	BOK Financial Securities
Co-Manager	Cabrera Capital Markets, LLC
Paying Agent	UMB Bank, N.A.

NEW ISSUE: BOOK-ENTRY-ONLY

Ratings: Moody's: "Aaa"
PSF Guaranteed
(See "RATINGS" and
"THE PERMANENT SCHOOL
FUND GUARANTEE PROGRAM")

OFFICIAL STATEMENT April 19, 2023

In the opinion of Bond Counsel, under existing law, interest on the Bonds is (i) excludable from gross income for federal income tax purposes under section 103 of the Internal Revenue Code of 1986, as amended, and (ii) not an item of tax preference for purposes of the alternative minimum tax on individuals. See "TAX MATTERS" herein, including information regarding potential alternative minimum tax consequences for corporations.

\$78,455,000
WACO INDEPENDENT SCHOOL DISTRICT
(A political subdivision of the State of Texas located in McLennan County, Texas)
UNLIMITED TAX SCHOOL BUILDING BONDS, SERIES 2023

Dated Date: April 1, 2023 (interest will accrue from the Delivery Date)

Due: August 15, as shown on page ii

The Waco Independent School District (the "District") is issuing its \$78,455,000 Unlimited Tax School Building Bonds, Series 2023 (the "Bonds") in accordance with the Constitution and general laws of the State of Texas, including, particularly, Chapter 45, Texas Education Code, as amended, Chapter 1371, Texas Government Code, as amended, an order (the "Bond Order") adopted by the Board of Trustees of the District (the "Board") on March 23, 2023 authorizing the issuance of the Bonds and delegating authority to certain officers of the District to complete the sale of the Bonds through the execution of a pricing certificate (the "Pricing Certificate"), and an election held within the District on November 2, 2021 (the "Election"). The Pricing Certificate was executed by an authorized District official on April 19, 2023. The Bond Order and the Pricing Certificate are collectively referred to herein as the "Order". The Bonds constitute direct obligations of the District and are payable as to principal and interest from the proceeds of an annual ad valorem tax levied, without legal limit as to rate or amount, against all taxable property located within the District, as provided in the Order.

Interest on the Bonds will accrue from the Delivery Date (defined herein), and will be payable on February 15 and August 15 each year, commencing February 15, 2024 until stated maturity or prior redemption. The Bonds will be issued as fully registered obligations in principal denominations of \$5,000 or any integral multiple thereof within a stated maturity. Interest accruing on the Bonds will be calculated on the basis of a 360-day year consisting of twelve 30-day months. (See "THE BONDS - General Description.")

The District has received conditional approval from the Texas Education Agency for the payment of principal of and interest on the Bonds to be guaranteed under the Permanent School Fund Guarantee Program which will automatically become effective when the Attorney General of Texas approves the Bonds. (See "THE PERMANENT SCHOOL FUND GUARANTEE PROGRAM").

The District intends to utilize the Book-Entry-Only System of The Depository Trust Company ("DTC"), but reserves the right on its behalf or on behalf of DTC to discontinue such system. The principal of, and interest on the Bonds will be payable to Cede & Co., as nominee for DTC, by UMB Bank, N.A., Austin, Texas, as the initial Paying Agent/Registrar (the "Paying Agent/Registrar") for the Bonds. No physical delivery of the Bonds will be made to the owners thereof. Such Book-Entry-Only System will affect the method and timing of payment and the method of transfer. (See "BOOK-ENTRY-ONLY SYSTEM").

The District reserves the right, at its option, to redeem Bonds having stated maturities on and after August 15, 2033, in whole or in part, in principal amounts of \$5,000 or any integral multiple thereof, on August 15, 2032 or any date thereafter, at par value thereof plus accrued interest to the date of redemption. The Term Bonds, hereinafter defined, are subject to mandatory sinking fund redemption as described herein. (See "THE BONDS - Redemption Provisions").

Proceeds from the sale of the Bonds will be used for (i) the purposes of acquiring, constructing, renovating, improving and equipping school buildings of the District, including a new Waco High School, a new G.W. Carver Middle School, a new Tennyson Middle School, a new Kendrick Elementary School, and the purchase of necessary sites for school buildings, and (ii) paying the costs of issuing the Bonds. (See "THE BONDS - Authorization and Purpose").

MATURITY SCHEDULE ON INSIDE COVER, PAGE ii

The Bonds are offered when, as and if issued, and accepted by the initial purchasers thereof named below (the "Underwriters"), subject to the approval of legality by the Attorney General of the State of Texas and the approval of certain legal matters by Bracewell LLP, Dallas Texas, Bond Counsel. Certain legal matters will be passed upon for the Underwriters by their co-counsel, Orrick, Herrington & Sutcliffe LLP, Austin, Texas and the Perez Law Firm PLLC, McAllen, Texas. The Bonds are expected to be available for initial delivery through the services of DTC on or about May 16, 2023 (the "Delivery Date").

635 **OPPENHEIMER & CO.**
BOK FINANCIAL SECURITIES, INC.

BAIRD
CABRERA CAPITAL MARKETS, LLC

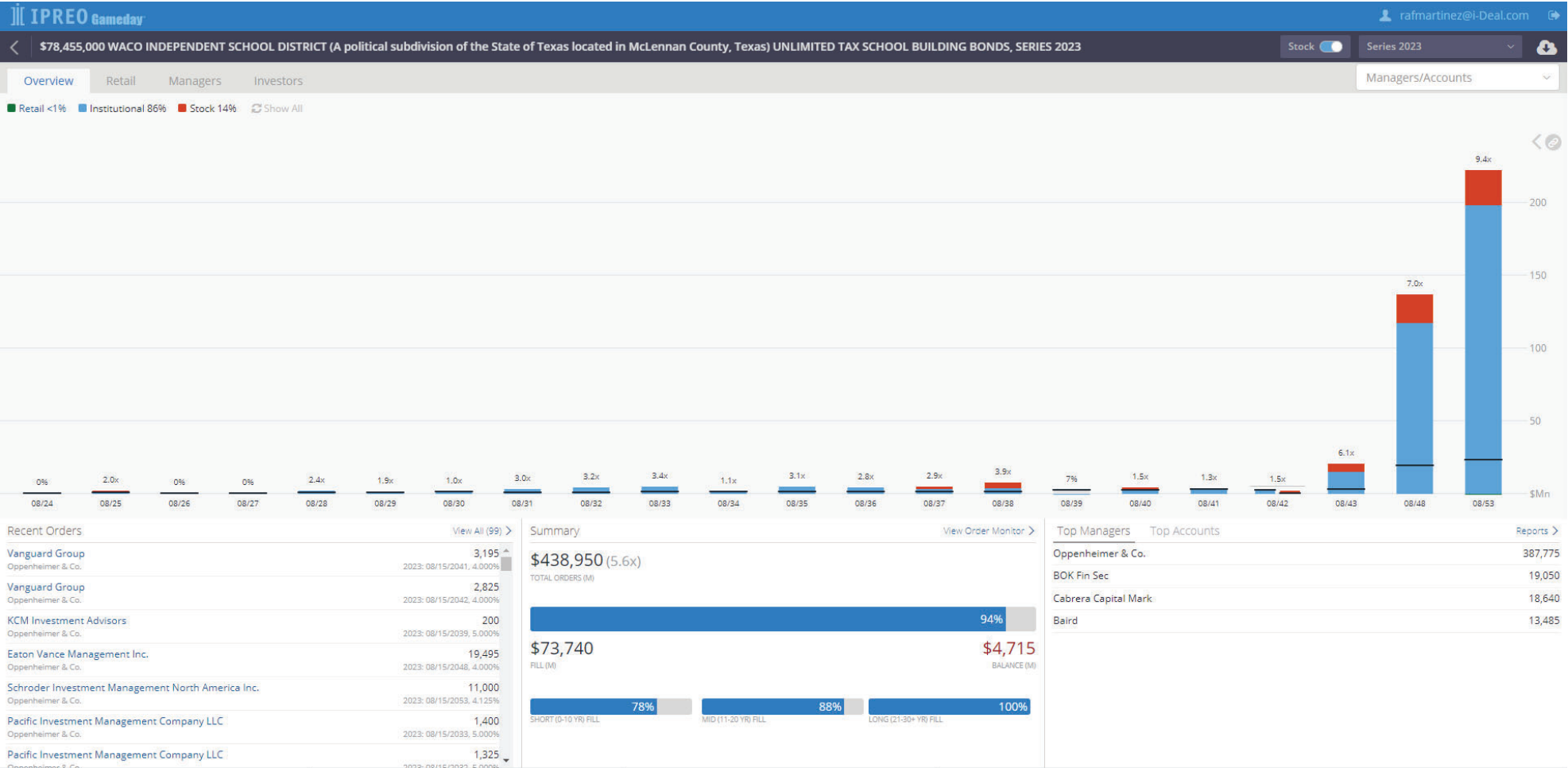
Sources and Uses of Funds - Series 2023	
Sources	
Principal	\$ 78,455,000.00
Net Premium	2,262,988.90
Total Sources	\$ 80,717,988.90
Uses	
Project Fund Deposit	\$ 80,000,000.00
Underwriters' Discount	400,968.62
Costs of Issuance & excess proceeds	317,020.28
Total Uses	\$ 80,717,988.90

Total Waco ISD Debt Service



Fiscal Year Ending	Existing Debt Service	Series 2023 Bonds		Total Debt Service	Total Debt Service
		Principal	Interest		
08/31/2023	\$ 24,868,757				\$ 24,868,757
08/31/2024	21,148,523	\$ 475,000	\$ 4,271,697	\$ 4,746,697	25,895,220
08/31/2025	21,505,273	1,025,000	3,401,219	4,426,219	25,931,492
08/31/2026	21,965,773	790,000	3,349,969	4,139,969	26,105,742
08/31/2027	22,046,423	750,000	3,310,469	4,060,469	26,106,892
08/31/2028	21,951,673	885,000	3,272,969	4,157,969	26,109,642
08/31/2029	21,926,673	955,000	3,228,719	4,183,719	26,110,392
08/31/2030	20,998,273	1,925,000	3,180,969	5,105,969	26,104,242
08/31/2031	21,926,023	1,100,000	3,084,719	4,184,719	26,110,742
08/31/2032	21,683,533	1,395,000	3,029,719	4,424,719	26,108,251
08/31/2033	21,678,558	1,470,000	2,959,969	4,429,969	26,108,526
08/31/2034	21,682,375	1,540,000	2,886,469	4,426,469	26,108,844
08/31/2035	21,684,075	1,620,000	2,809,469	4,429,469	26,113,543
08/31/2036	21,692,678	1,690,000	2,728,469	4,418,469	26,111,147
08/31/2037	21,787,140	1,680,000	2,643,969	4,323,969	26,111,109
08/31/2038	21,590,315	1,960,000	2,559,969	4,519,969	26,110,284
08/31/2039	19,988,556	2,900,000	2,461,969	5,361,969	25,350,525
08/31/2040	19,601,606	3,045,000	2,316,969	5,361,969	24,963,575
08/31/2041	19,598,306	3,195,000	2,164,719	5,359,719	24,958,025
08/31/2042	19,597,306	3,325,000	2,036,919	5,361,919	24,959,225
08/31/2043	19,600,906	3,460,000	1,898,919	5,358,919	24,959,825
08/31/2044	19,599,263	3,600,000	1,760,519	5,360,519	24,959,781
08/31/2045	19,600,725	3,745,000	1,616,519	5,361,519	24,962,244
08/31/2046	19,599,025	3,890,000	1,466,719	5,356,719	24,955,744
08/31/2047	19,598,356	4,050,000	1,311,119	5,361,119	24,959,475
08/31/2048	19,597,713	4,210,000	1,149,119	5,359,119	24,956,831
08/31/2049	19,601,213	4,380,000	980,719	5,360,719	24,961,931
08/31/2050	19,596,213	4,560,000	800,044	5,360,044	24,956,256
08/31/2051	19,602,413	4,745,000	611,944	5,356,944	24,959,356
08/31/2052	19,593,725	4,945,000	416,213	5,361,213	24,954,938
08/31/2053	-	5,145,000	212,231	5,357,231	5,357,231
Total	\$ 624,911,389	\$ 78,455,000	\$ 67,923,397	\$ 146,378,397	\$ 771,289,786

Pricing Day Orders



Overview of Credit Ratings

Waco ISD ("Aa2")



Credit Rating Grid

		S&P	Moody's	Fitch
Highest Quality (Lowest default risk)	Credit Rating Levels	AAA	Aaa	AAA
High Grade / High Quality		AA+	Aa1	AA+
		AA	Aa2	AA
		AA-	Aa3	AA-
Upper Medium Grade		A+	A1	A+
		A	A2	A
		A-	A3	A-
Minimum Investment Grade		BBB+	Baa1	BBB+
		BBB	Baa2	BBB
		BBB-	Baa3	BBB-
Speculative Grade		BB+	Ba1	BB+
		BB	Ba2	BB
		BB-	Ba3	BB-
		B+	B1	B+
		B	B2	B
		B-	B3	B-
Highly Speculative Grade		CCC (+/-)	Caa1	CCC (+/-)
	CC	Caa2	CC	
	C	Caa3	C	
Imminent default or in default		SD or D	Ca or C	SD or D



Comment on Waco ISD Ratings

Credit Strengths:

- ▲ Positive financial operations and strong reserves
- ▲ Low fixed costs
- ▲ Presence of Baylor University

Credit Challenges:

- ▼ Negative enrollment trend
- ▼ Weak economic profile (low adjusted resident income)

Waco Independent School District
Board of Trustees Board Meeting

Date: June 29, 2023

Contact Person: Dr. Daniel Lopez

RE: Review and Discuss the Texas Association of School Boards (TASB) Pay Maintenance Study

Background Information:

Waco ISD engaged the HR Services Division of the Texas Association of School Boards (TASB) to conduct a Pay Maintenance Study. This presentation provides market comparisons, recommendations, and cost models that were derived from the maintenance review for compensation conducted in the Spring of 2023.

The pay systems maintenance addressed the following employee groups: Teachers, Exempt Staff, and Non-Exempt Staff. Recommendations provided in the report are intended only as information for decision-making purposes.

Fiscal Implications:

None

Administrative Recommendation(s):

No action is required. This information is presented for review and discussion only.

Waco ISD

Pay Systems Maintenance

Jennifer Barton, HR and Compensation Consultant
June 29, 2023

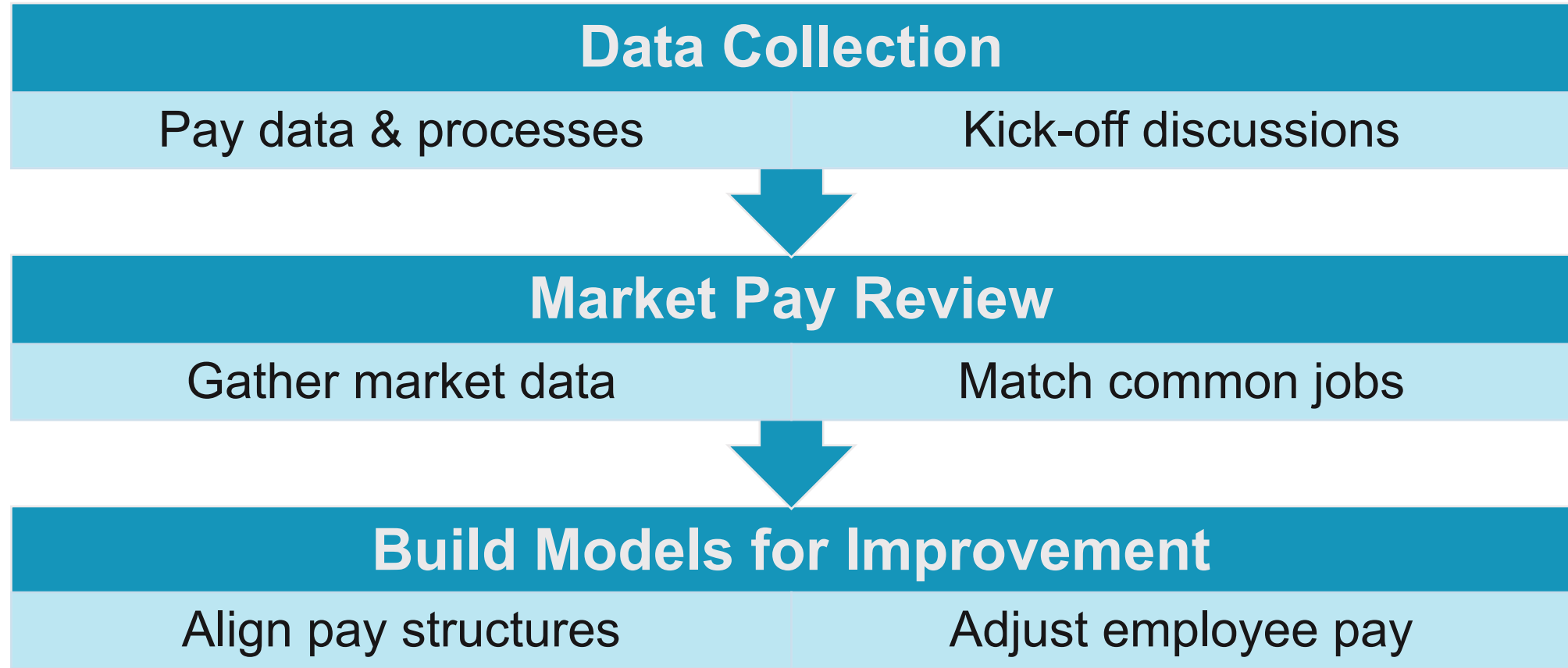


HR Services

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

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TASB Pay Study Process



Pay System Objectives

- **Recruit Employees**

- Competitive entry rates
- Competitive pay for experienced new hires

- **Pay for Job Value**

- Prevent overpayment or underpayment

- **Retain Employees**

- Advance pay to market rates
- Market-competitive pay increases

- **Control Costs**

- Salary plan and increases driven by budget

Strategies for Pay System Control

- Assess job value accurately
- Keep pay ranges competitive
- Control pay spread between job incumbents
- Accelerate employees to market pay
- Budget sufficiently for pay increases

Market Pay Strategy

Midpoint rate is intentionally set:

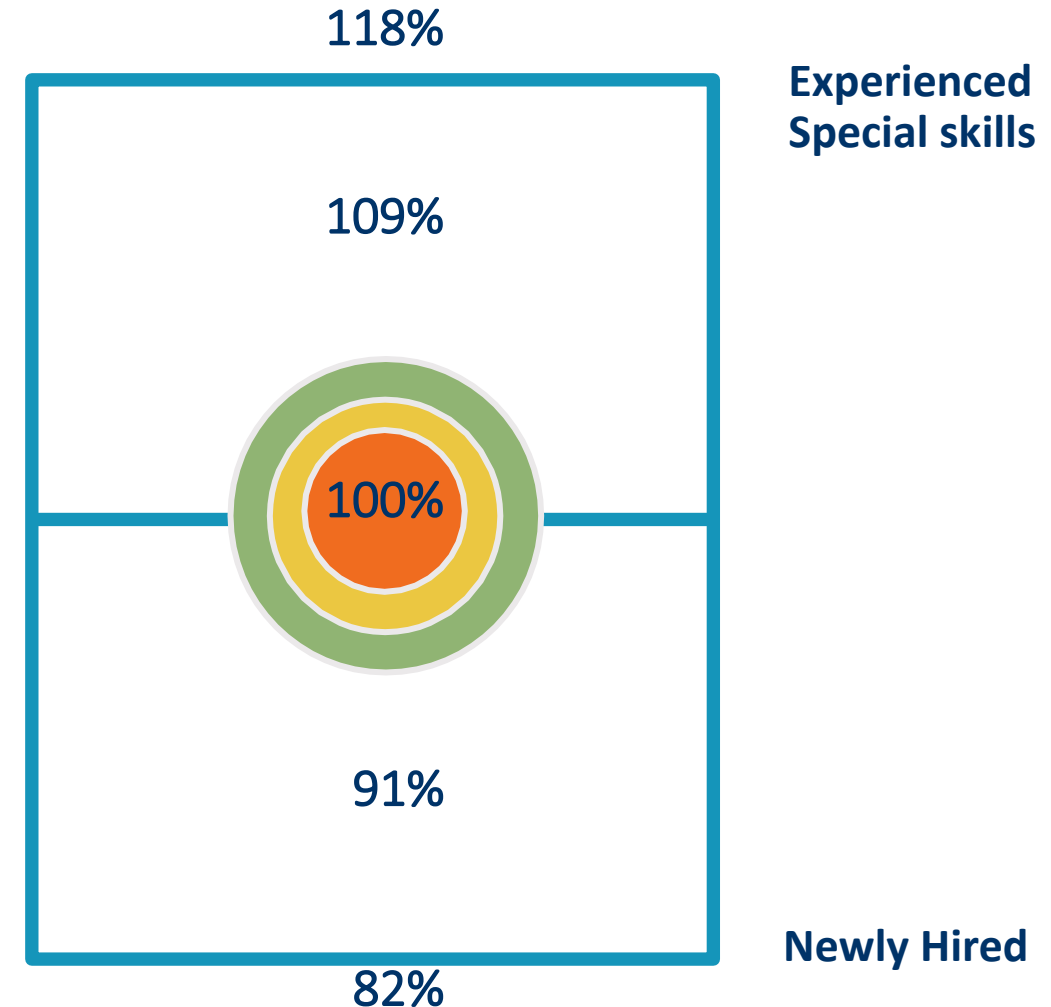
- Market value
- District goals

Range parameters are set to limit employee pay variance from the target rate.

Goal is to pay employees near target rate.

Target rate is adjusted regularly.

645



Market Districts

*** District did not participate in TASB salary survey. Teacher schedules collected from the district.*

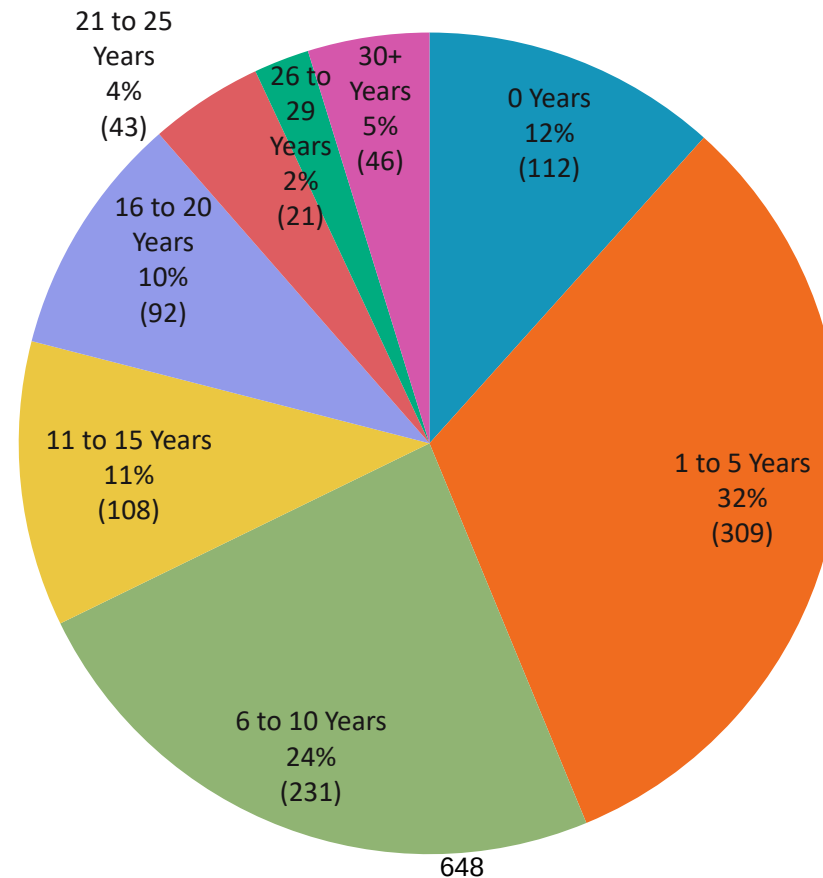
	District	ESC Region	Student Enrollment	Number of FTE	Teacher, Exempt, Nonexempt
1	Belton ISD	12	13,636	2,130	X
2	Bryan ISD	06	16,180	2,691	X
3	College Station ISD	06	14,187	1,963	X
4	Copperas Cove ISD	12	8,112	1,288	X
5	Crowley ISD	11	16,541	2,054	X
6	Del Valle ISD	13	11,078	1,700	X
7	Duncanville ISD	10	11,908	1,806	**
8	Georgetown ISD	13	13,005	1,932	X
9	Grapevine-Colleyville ISD	11	13,790	1,954	X
10	Killeen ISD	12	43,938	6,026	X
11	La Vega ISD	12	3,091	484	**
12	Leander ISD	13	42,265	5,450	X
13	Longview ISD	07	8,236	1,252	X
14	Mansfield ISD	11	35,559	4,495	X
15	Midlothian ISD	10	10,922	1,342	X
16	Midway ISD-McLennan County	12	8,749	1,304	X
17	Pflugerville ISD	13	25,519	3,462	X
18	Round Rock ISD	13	47,270	6,600	X
19	Temple ISD	12	8,522	1,415	X
20	Tyler ISD	07	18,148	2,550	X
	Waco ISD	12	14,086	2,302	20

Other Waco Metro Area Market Sources

- Economic Research Institute
- CompAnalyst

Teachers – Demographics

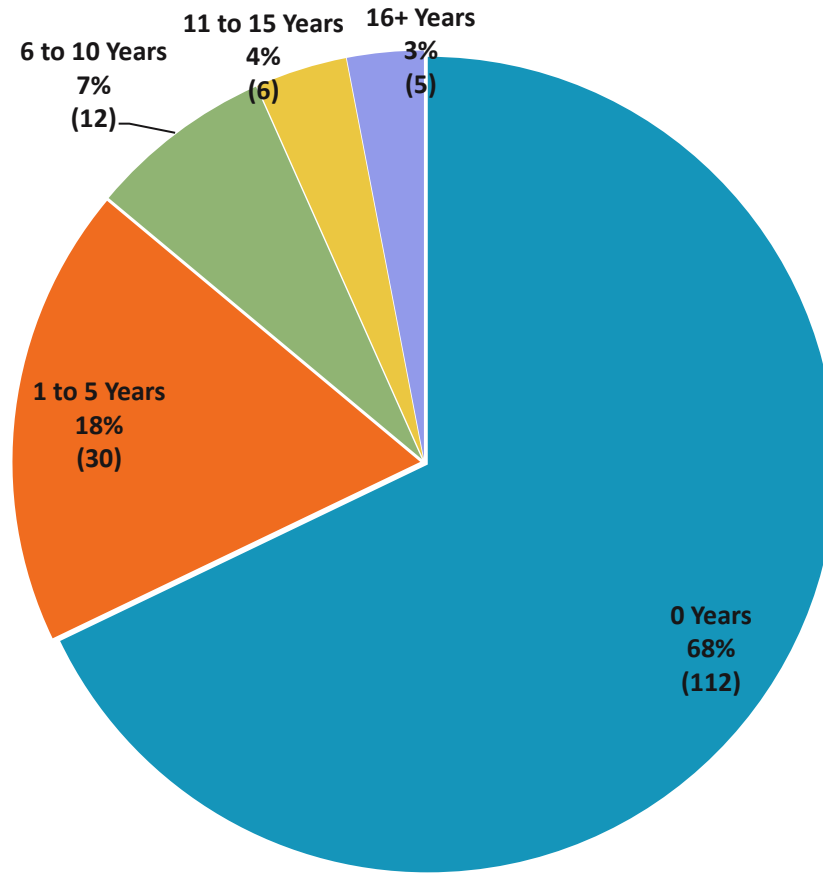
Experience of Current Teachers



962 Teachers

Teachers – Demographics

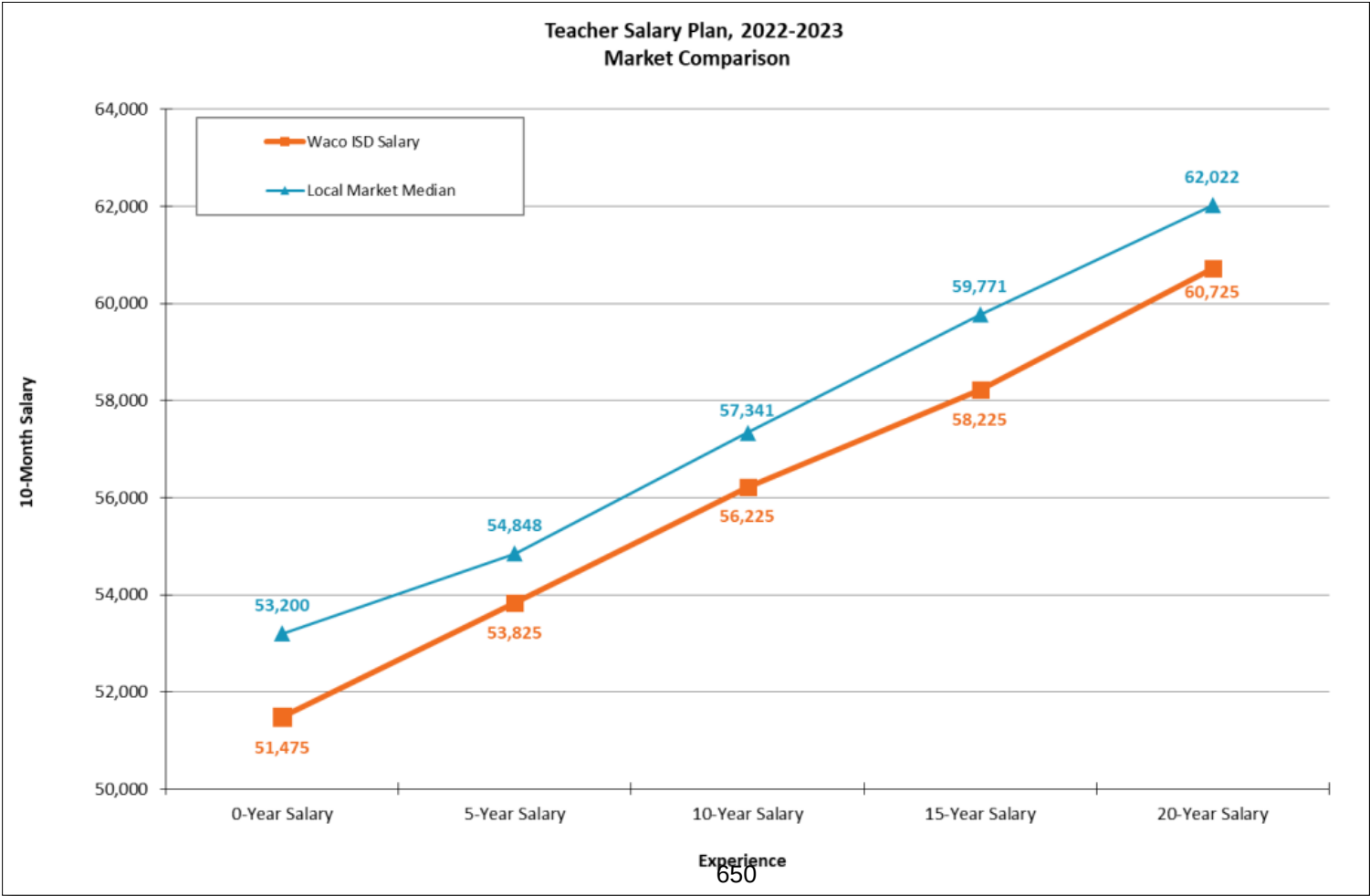
Experience of Newly Hired Teachers



649

165 Teachers
with 0 years of local experience in 2022-2023

Teachers – Market Graph



Teachers – Market Salaries

	0 - Years	5 - Years	10 - Years	15 - Years	20 - Years
Waco ISD Salary	\$51,475	\$53,825	\$56,225	\$58,225	\$60,725
Local Market Median	\$53,200	\$54,848	\$57,341	\$59,771	\$62,022
% Difference from Market	97%	98%	98%	97%	98%
Difference from Market	(\$1,725)	(\$1,023)	(\$1,116)	(\$1,546)	(\$1,297)

Teachers – Market Stipends

Stipend	Waco ISD	Median Stipend	Districts Reporting
Secondary Math	\$8,000	\$3,120	11 of 18
Secondary Science	\$8,000	\$3,120	11 of 18
Special Education - General/Resource	\$1,500	\$1,600	8 of 18
Special Education - Self-Contained	\$3,000	\$2,500	15 of 18
Bilingual	\$6,000	\$6,000	18 of 18
ESL – General	\$1,000	\$1,250	6 of 18
ESL – Dual Language Program	\$1,000	\$2,500	4 of 18

Other Pay Groups – Market Salaries

Pay Group	Employee Pay to Market	Pay Grade Midpoint to Market	Pay Grade Minimum to Market	Number of Benchmarks
Central Administration	102%	100%	--	25
Campus Administration	100%	103%	--	7
Professional	99%	102%	--	34
Clerical/Technical	94%	99%	90%	25
Instructional Support	107%	108%	99%	8
Auxiliary	100% 653	105%	97%	24

Recommendation 1

Implement pay structure adjustments to align with market

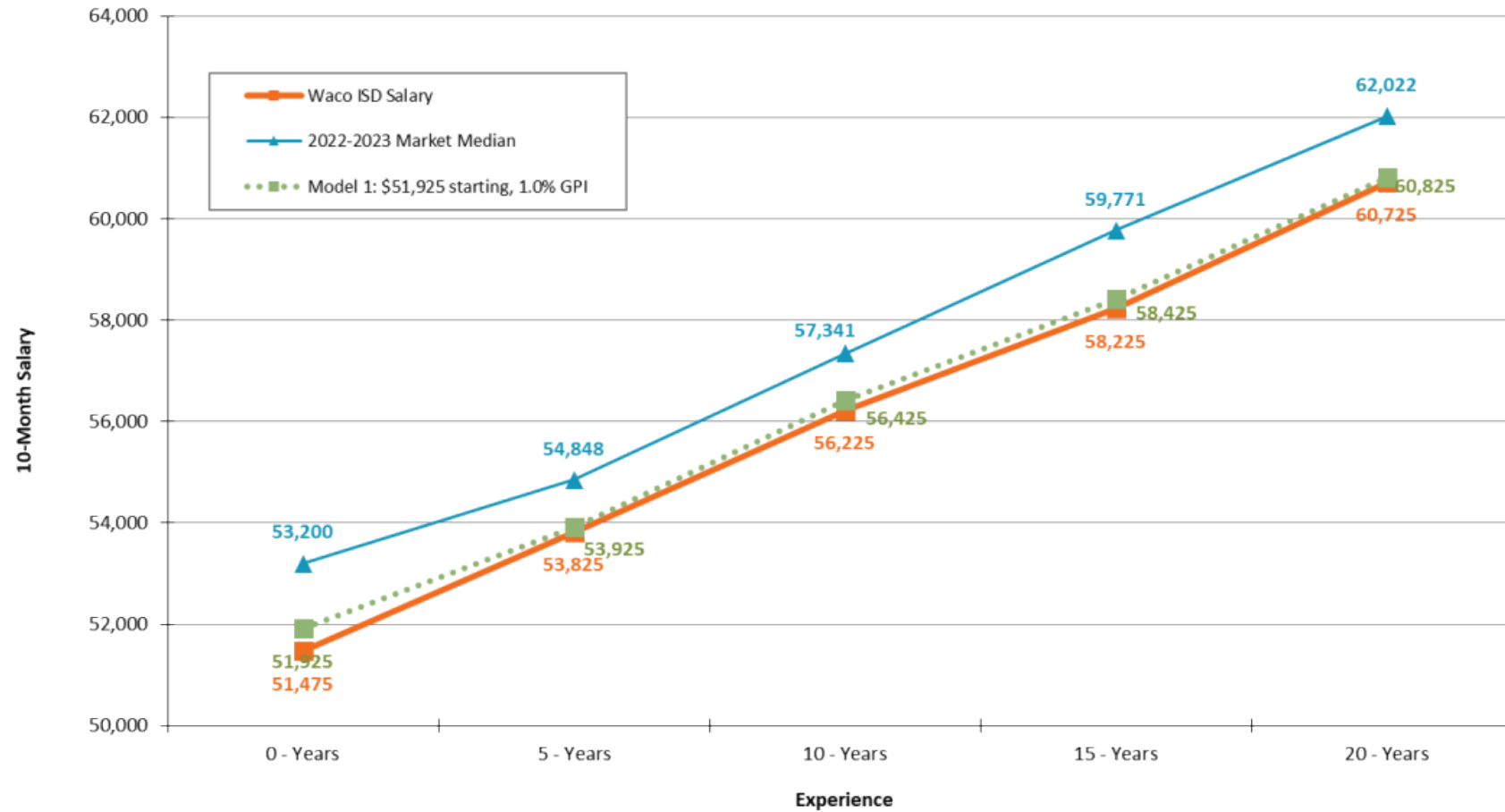
- Improved starting salaries
- Midpoints aligned with market
- Align jobs within structures

Recommendation 2

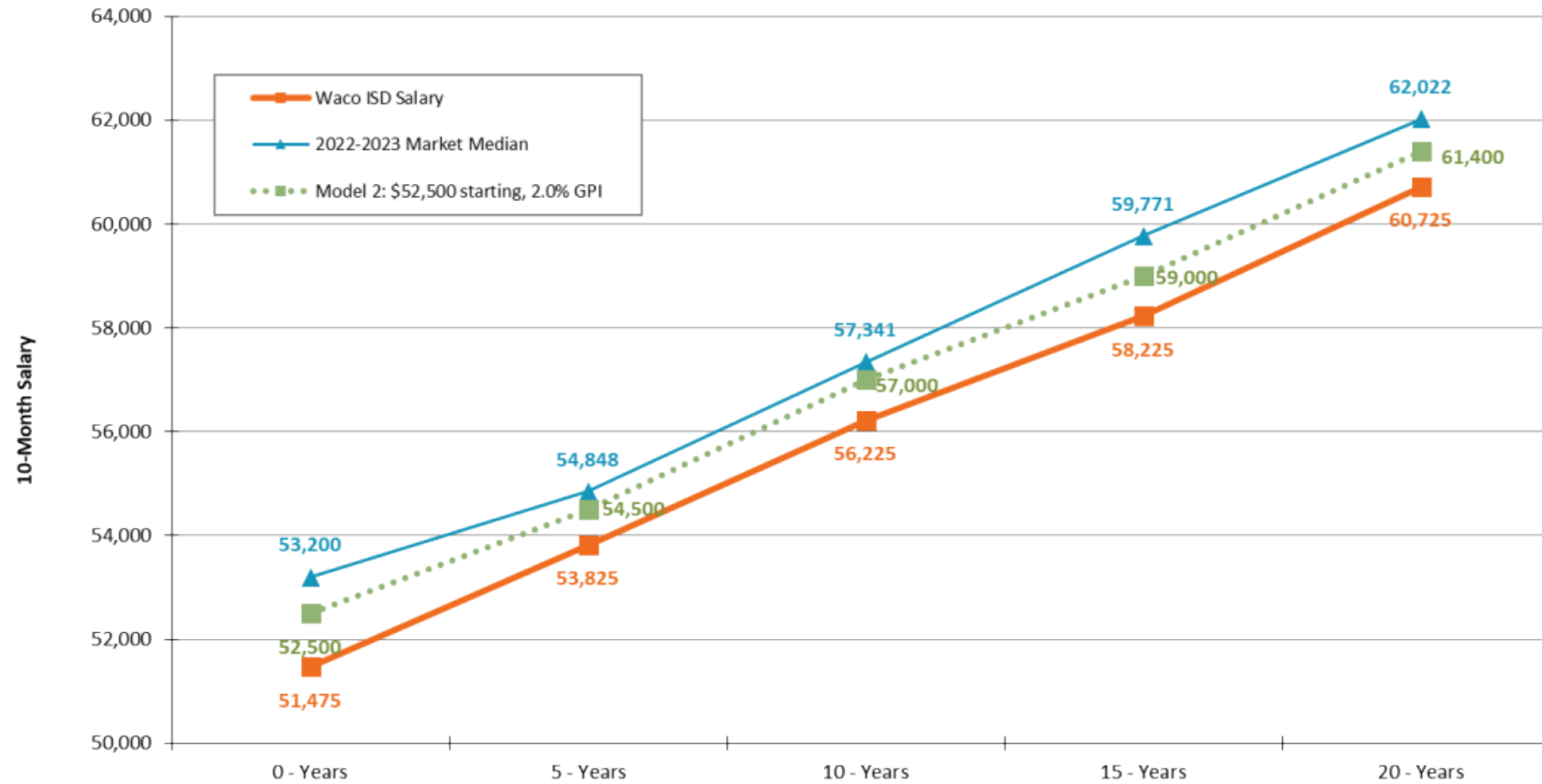
Adopt a general pay increase (GPI) to maintain market position

- Model 1: 1% for all job groups
- Model 2: 2% for all job groups
- Model 3: 3% for all job groups
- For teacher structure, GPI calculated as a percentage of market median salary (\$58,149)
- For other pay groups, GPI calculated as a percentage of employee's pay grade midpoint

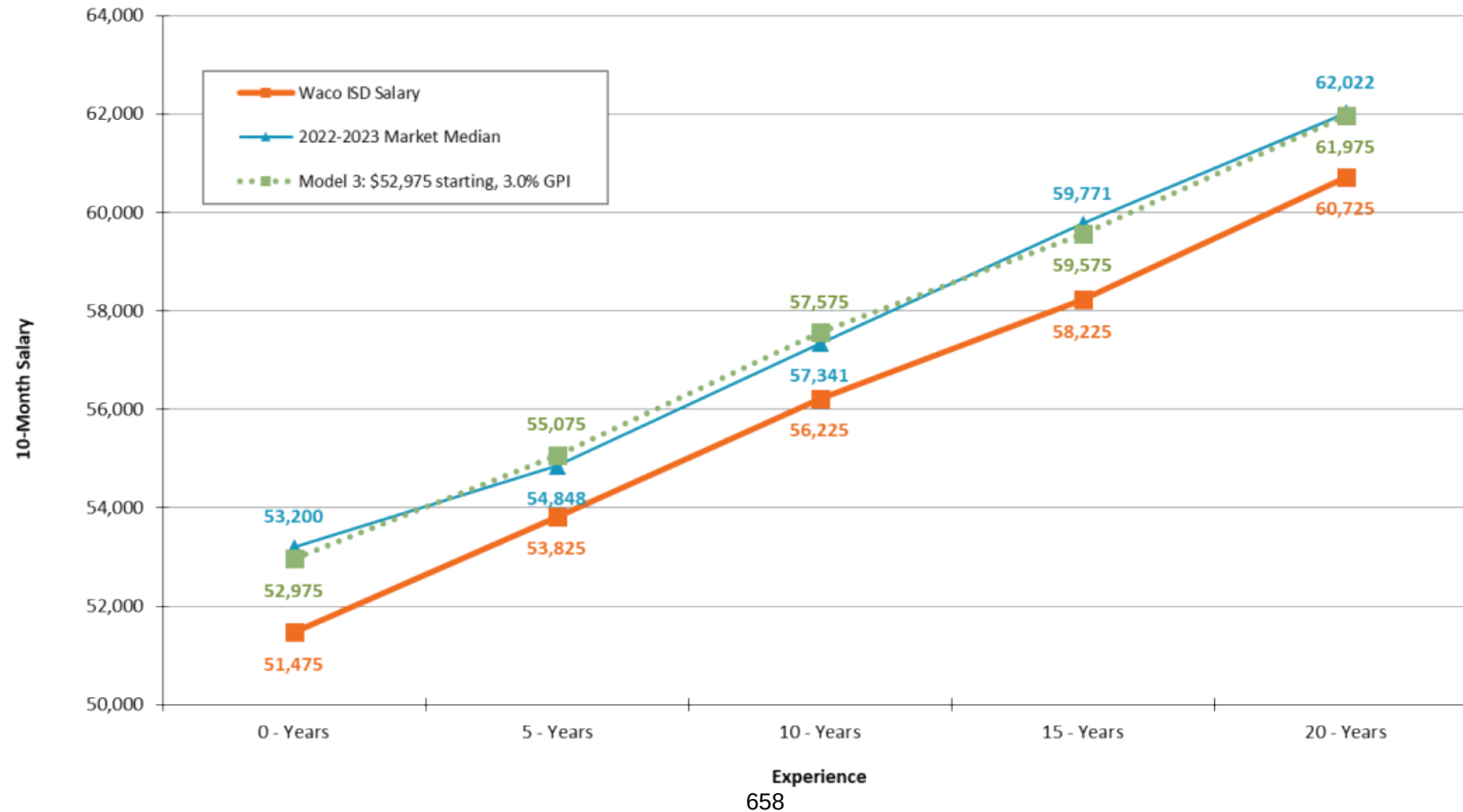
Recommendation 2



Recommendation 2



Recommendation 2



Recommendation 3

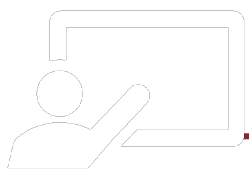
Provide adjustments to address market differences and maintain equity

- Increase to 1 percent above minimum
- Teacher pay equity adjustments
- Strategic adjustments
- Placement scale adjustments for hourly employees

Recommendation 4

Consider increasing stipends for hard-to-fill teaching assignments

- Bilingual: Increase value from \$6,000 to \$7,000



Recommendation 5

Continue to annually review district compensation plan and update as needed to maintain market competitiveness

Cost – Model 1 (1.0%)

Pay Group	General Pay Increase	Adjustments	Estimated Total Increase
Teachers	\$573,929	\$24,982	\$598,911
Administrative Professional	\$348,660	\$148,510	\$497,170
Clerical Paraprofessional	\$151,187	\$163,239	\$314,426
Auxiliary	\$93,625	\$364,518	\$458,143
Total	\$1,167,401	\$701,249	\$1,868,650
% of Current Costs	1.1%	0.6%	1.7%

Cost – Model 2 (2.0%)

Pay Group	General Pay Increase	Adjustments	Estimated Total Increase
Teachers	\$1,123,718	\$25,012	\$1,148,730
Administrative Professional	\$697,278	\$117,873	\$815,151
Clerical Paraprofessional	\$302,039	\$116,623	\$418,662
Auxiliary	\$186,327	\$308,605	\$494,932
Total	\$2,309,362	\$568,113	\$2,877,475
% of Current Costs	2.1%	0.5%	2.6%

Cost – Model 3 (3.0%)

Pay Group	General Pay Increase	Adjustments	Estimated Total Increase
Teachers	\$1,673,689	\$9,405	\$1,683,094
Administrative Professional	\$1,045,869	\$94,959	\$1,140,828
Clerical Paraprofessional	\$453,395	\$81,425	\$534,820
Auxiliary	\$279,726	\$257,628	\$537,354
Total	\$3,452,679	\$443,417	\$3,896,096
% of Current Costs	3.2%	0.4%	3.6%

Jennifer Barton,
HR and Compensation Consultant
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Pay Systems Maintenance

Waco Independent School District

July 2023

Jennifer Barton



INTRODUCTION

Waco ISD (WISD) engaged the HR Services Division of the Texas Association of School Boards (TASB) to provide pay system maintenance. TASB offers this maintenance service to former clients that have adopted a market-based pay plan.

The report presents a summary of our findings and recommendations based on three percentage adjustment models requested by the district. It includes a market comparison of key benchmark jobs, a cost estimate of the requested pay increase adjustments, a new teacher placement guide, and pay range structures for other job groups.

Project Activities

The following tasks were completed according to the district's service agreement:

- Set up pay file modeling templates using a snapshot of actual employee data
- Reviewed competitive pay for teachers and key benchmark jobs
- Reviewed and adjusted teacher hiring schedule and other pay range structures as needed
- Calculated individual employee pay adjustments
- Calculated cost estimates for adjustment models
- Recommended strategic adjustments for improvement of pay problems
- Conducted a briefing and delivered a report to district leadership team

Employee data files will be transferred electronically upon completion of the project.

Note: Pay adjustments are based on the snapshot of district employee data at the time data was received by TASB. Districts are responsible for updating payroll systems and calculating pay for any subsequent new hires.

MARKET SUMMARY

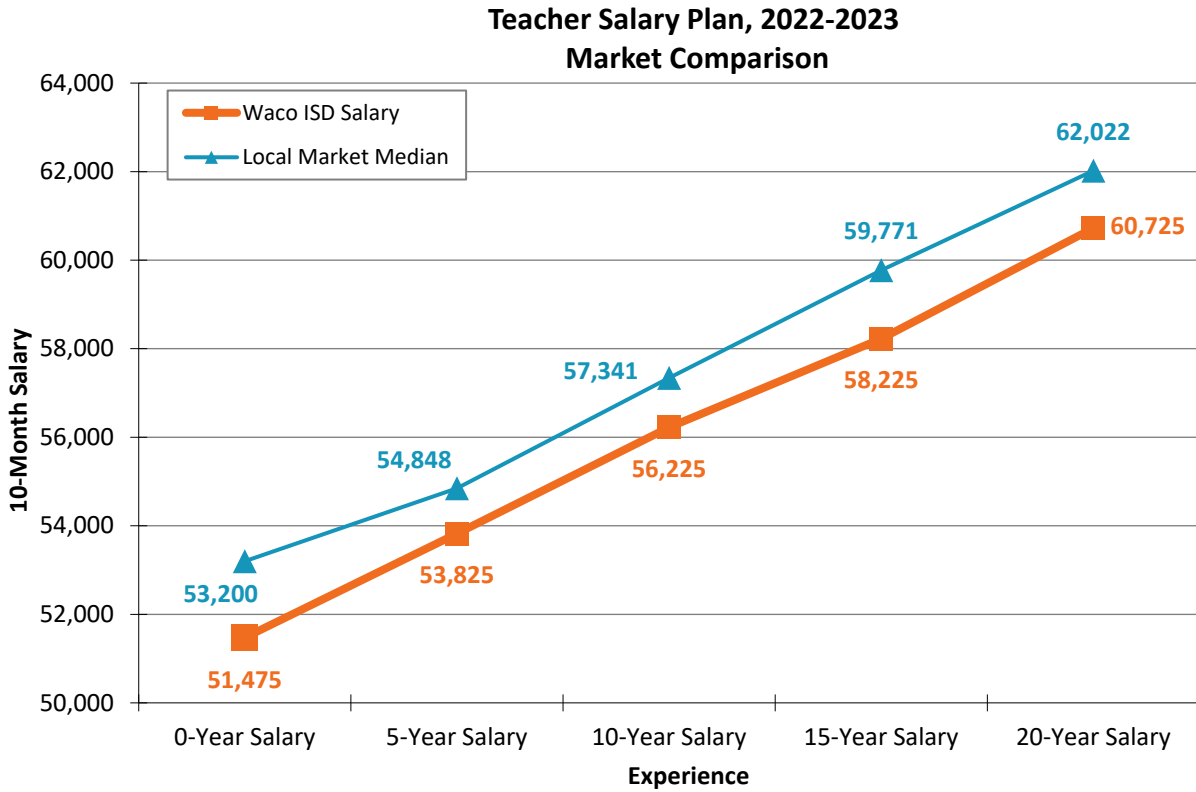
Comparison districts were selected based on enrollment and location. School district data was obtained from the most recent available surveys conducted by TASB HR Services. Non-school market data for the Waco metro area from multiple third-party sources was incorporated for positions with similar jobs outside of K-12 education. Statewide market data for districts of comparable size (10,000 to 24,999) was used for high-level central administrator jobs.

	District	ESC Region	Student Enrollment	Number of FTE	Teacher, Exempt, Nonexempt
1	Belton ISD	12	13,636	2,130	X
2	Bryan ISD	06	16,180	2,691	X
3	College Station ISD	06	14,187	1,963	X
4	Copperas Cove ISD	12	8,112	1,288	X
5	Crowley ISD	11	16,541	2,054	X
6	Del Valle ISD	13	11,078	1,700	X
7	Duncanville ISD	10	11,908	1,806	**
8	Georgetown ISD	13	13,005	1,932	X
9	Grapevine-Colleyville ISD	11	13,790	1,954	X
10	Killeen ISD	12	43,938	6,026	X
11	La Vega ISD	12	3,091	484	**
12	Leander ISD	13	42,265	5,450	X
13	Longview ISD	07	8,236	1,252	X
14	Mansfield ISD	11	35,559	4,495	X
15	Midlothian ISD	10	10,922	1,342	X
16	Midway ISD-McLennan County	12	8,749	1,304	X
17	Pflugerville ISD	13	25,519	3,462	X
18	Round Rock ISD	13	47,270	6,600	X
19	Temple ISD	12	8,522	1,415	X
20	Tyler ISD	07	18,148	2,550	X
Waco ISD		12	14,086	2,302	20

** District did not participate in survey. Teacher schedules collected from the district.

Teacher Market Comparison

Teacher salaries at WISD are below market median at all surveyed years in the range. Starting pay (0 years) is furthest from market at 3 percent below market (\$1,725 below market) and closest to market at year 5 at 2 percent below market (\$1,023 below market). Average teacher salary is 5 percent below market which is 2 percent lower than last year.



Teacher Salaries by Experience
Bachelor's degree, 10 months

District		0-Year Salary	5-Year Salary	10-Year Salary	15-Year Salary	20-Year Salary	Average Teacher Salary
1	Mansfield ISD	\$60,500	\$61,612	\$63,208	\$65,352	\$66,992	\$65,834
2	Crowley ISD	\$60,010	\$61,187	\$63,048	\$64,152	\$66,365	\$62,454
3	Grapevine-Colleyville ISD	\$57,000	\$58,700	\$61,300	\$62,900	\$64,400	\$62,403
4	Duncanville ISD**	\$57,000	\$58,000	\$59,200	\$60,700	\$62,700	
5	Killeen ISD	\$56,160	\$58,160	\$60,160	\$62,160	\$64,160	\$61,106
6	Midlothian ISD	\$56,000	\$58,000	\$60,000	\$62,000	\$64,000	\$61,214
7	Del Valle ISD	\$54,000	\$55,636	\$58,675	\$60,367	\$62,684	\$58,395
8	Leander ISD	\$53,520	\$54,896	\$57,182	\$59,617	\$61,862	\$58,540
9	Belton ISD	\$53,500	\$55,000	\$57,100	\$59,600	\$62,100	\$57,100
10	Pflugerville ISD	\$53,400	\$54,400	\$56,700	\$59,200	\$61,701	\$57,629
11	Round Rock ISD	\$53,000	\$54,800	\$57,575	\$59,925	\$61,943	\$58,501
12	Copperas Cove ISD	\$53,000	\$54,750	\$63,000	\$68,000	\$73,000	\$60,090
13	Georgetown ISD	\$53,000	\$54,500	\$56,000	\$58,278	\$60,803	\$57,028
14	Temple ISD	\$52,500	\$55,000	\$57,500	\$60,000	\$62,500	\$57,903
15	Bryan ISD	\$50,000	\$51,250	\$53,000	\$55,950	\$59,250	\$55,110
16	Tyler ISD	\$50,000	\$51,000	\$54,650	\$55,850	\$57,550	\$53,332
17	Longview ISD	\$49,500	\$50,800	\$53,280	\$55,780	\$58,940	\$54,781
18	College Station ISD	\$47,725	\$48,756	\$50,439	\$52,785	\$56,661	\$52,000
19	La Vega ISD**	\$47,204	\$50,204	\$54,292	\$57,292	\$60,292	
20	Midway ISD-McLennan County	\$47,100	\$49,255	\$52,385	\$55,830	\$59,250	\$52,954
Waco ISD		\$51,475	\$53,825	\$56,225	\$58,225	\$60,725	\$55,515
Median		\$53,200	\$54,848	\$57,341	\$59,771	\$62,022	\$58,149
Comparison to Median		97%	98%	98%	97%	98%	95%
Dollar Difference		(\$1,725)	(\$1,023)	(\$1,116)	(\$1,546)	(\$1,297)	(\$2,634)

** District did not participate in survey. Teacher schedules collected from the district.

In the table above, the horizontal arrow indicates how WISD's starting (0-year) teacher salary compares to a sorted list of the peer districts in the market.

The table below includes common teacher stipends and how the district compares with peers. This comparison may be helpful if the district is considering adjusting stipend amounts or offerings. Offering stipends for hard-to-fill positions is one method of remaining competitive with peer districts. Teacher stipends are addressed in the recommendations section of the report.

Stipend	Waco ISD	Median Stipend	Districts Reporting
Master's Degree – General	--	\$1,000	16 of 18
Master's Degree – Subject-Area	--	\$3,315	1 of 18
Secondary Math	\$8,000	\$3,120	11 of 18
Secondary Science	\$8,000	\$3,120	11 of 18
Bilingual	\$6,000	\$6,000	18 of 18
Special Education General/Resource	\$1,500	\$1,600	8 of 18
Special Education Self-Contained	\$3,000	\$2,500	15 of 18

The tables below show the employee groups included in this study as well as the average market comparison for each.

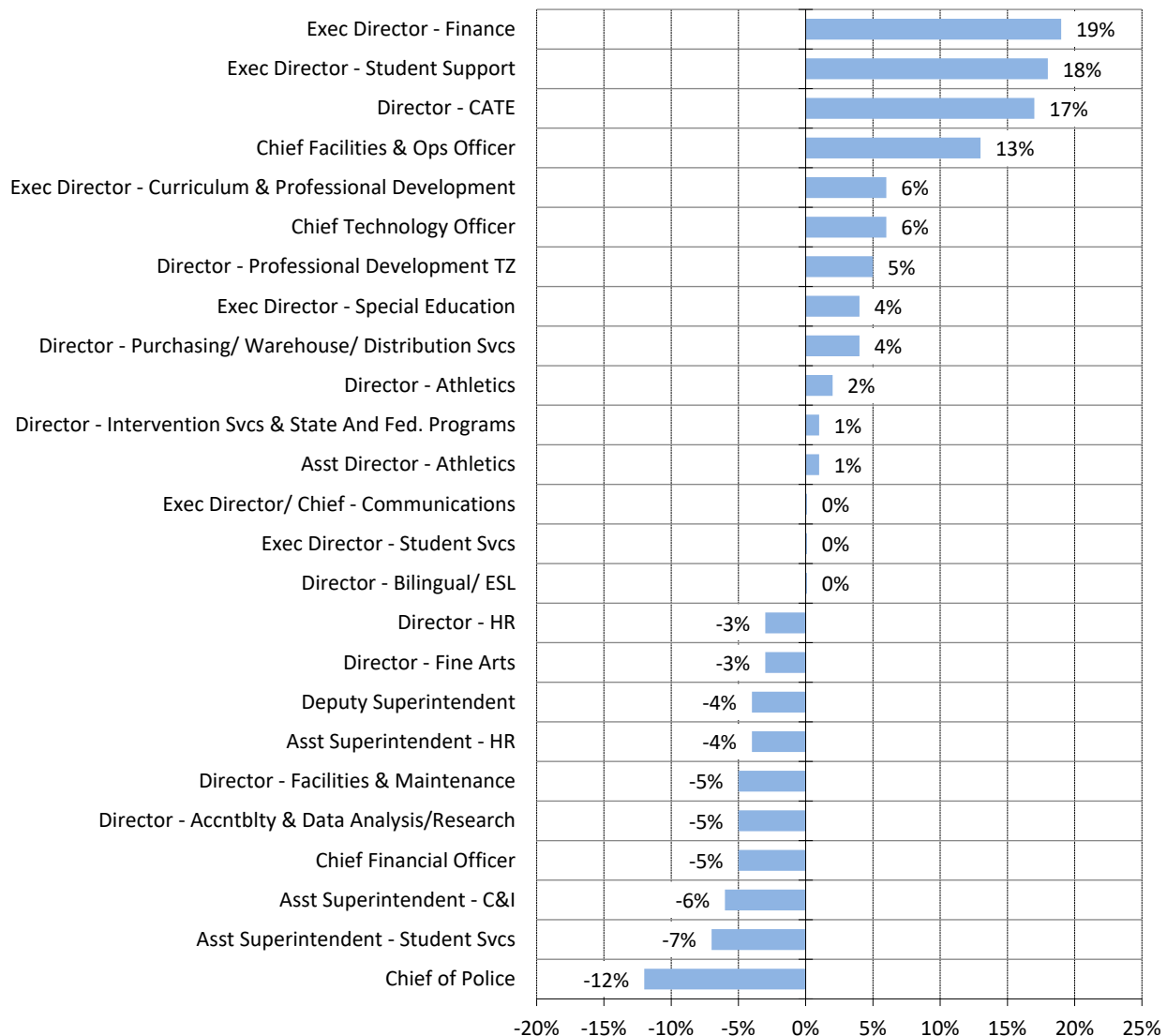
Exempt Pay Group	Employee Pay to Market	Pay Grade Midpoint to Market	Number of Benchmarks
Central Administration	102%	100%	25
Campus Administration	100%	103%	7
Professional	99%	102%	34

Nonexempt Pay Group	Employee Pay to Market	Pay Grade Midpoint to Market	Pay Grade Minimum to Market	Number of Benchmarks
Clerical & Technical	94%	99%	90%	25
Instructional Support	107%	108%	99%	8
Auxiliary	100%	105%	97%	24

Central Administration Market Comparison

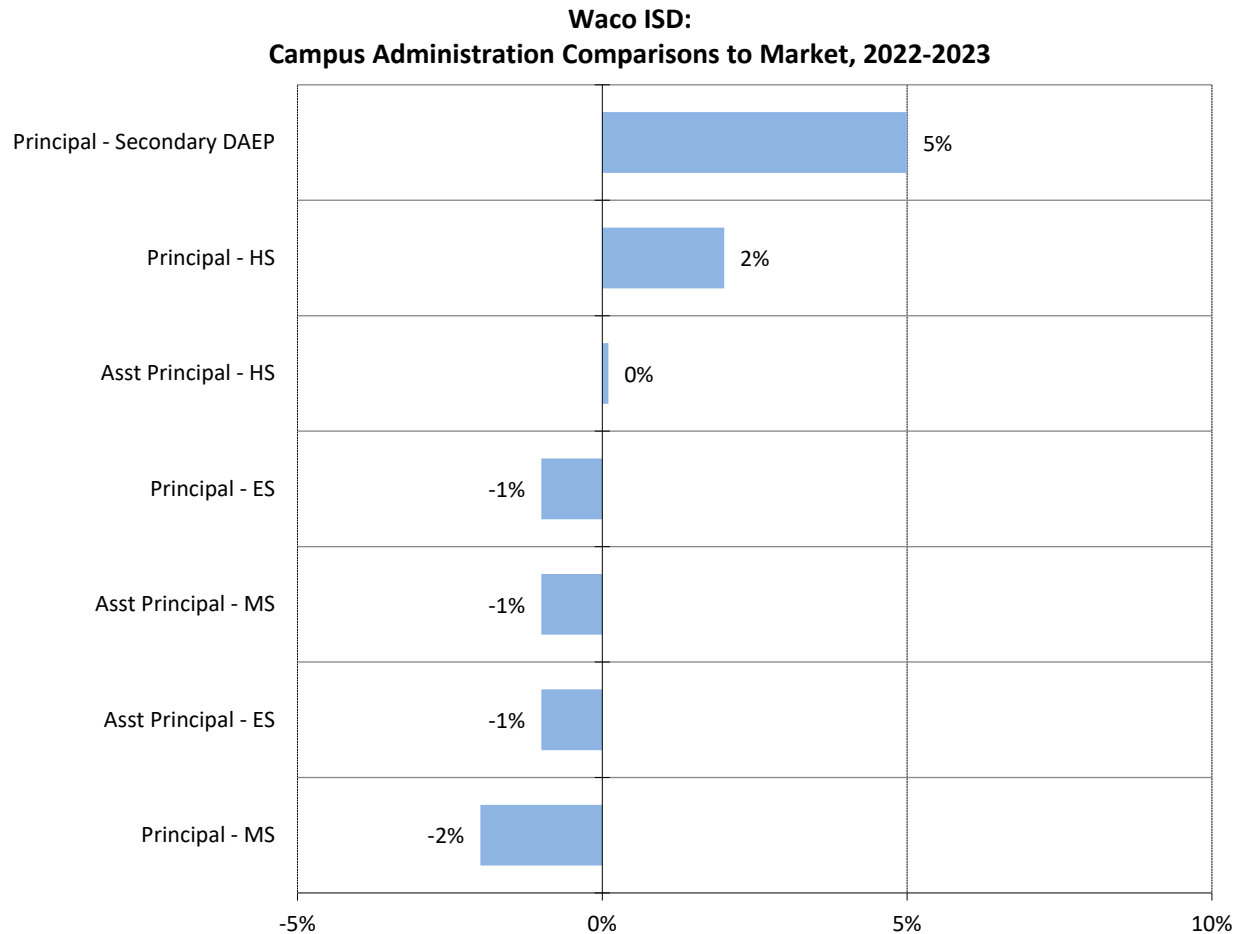
Benchmark central administration positions in WISD are 101 percent of market on average with jobs ranging from 12 percent below to 19 percent above market. One job in this group is more than 10 percent below market. Due to the number of single incumbent jobs in this group, market comparisons are based on statewide market values of comparable size districts (enrollment 10,000 to 24,999).

Waco ISD: Central Administration Comparisons to Market, 2022-2023



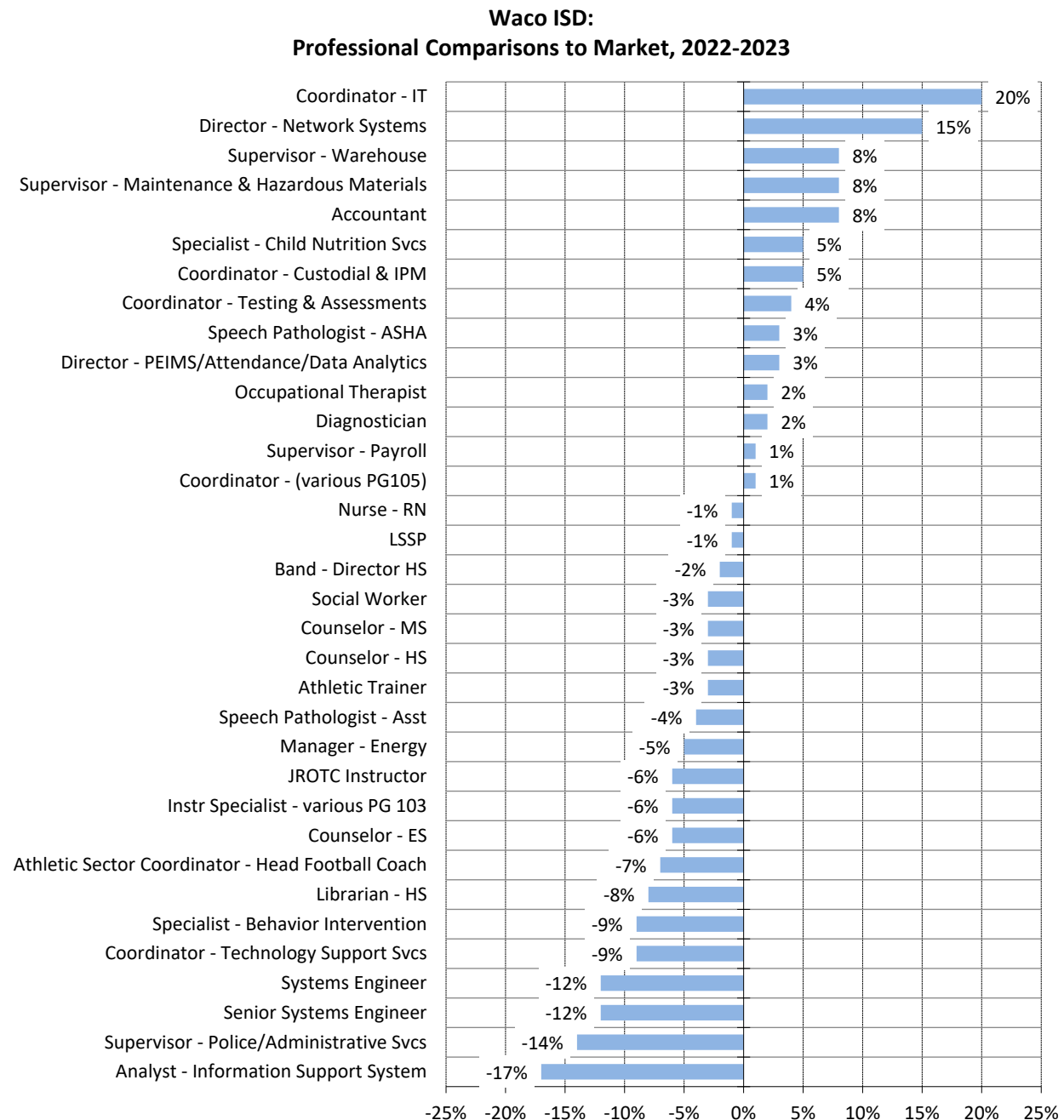
Campus Administration Market Comparison

Across benchmark campus administration jobs, WISD is paying 100 percent of market, on average. Jobs range between 2 percent below to 5 percent above market. Overall, campus administrator pay is aligned with market.



Professional Market Comparison

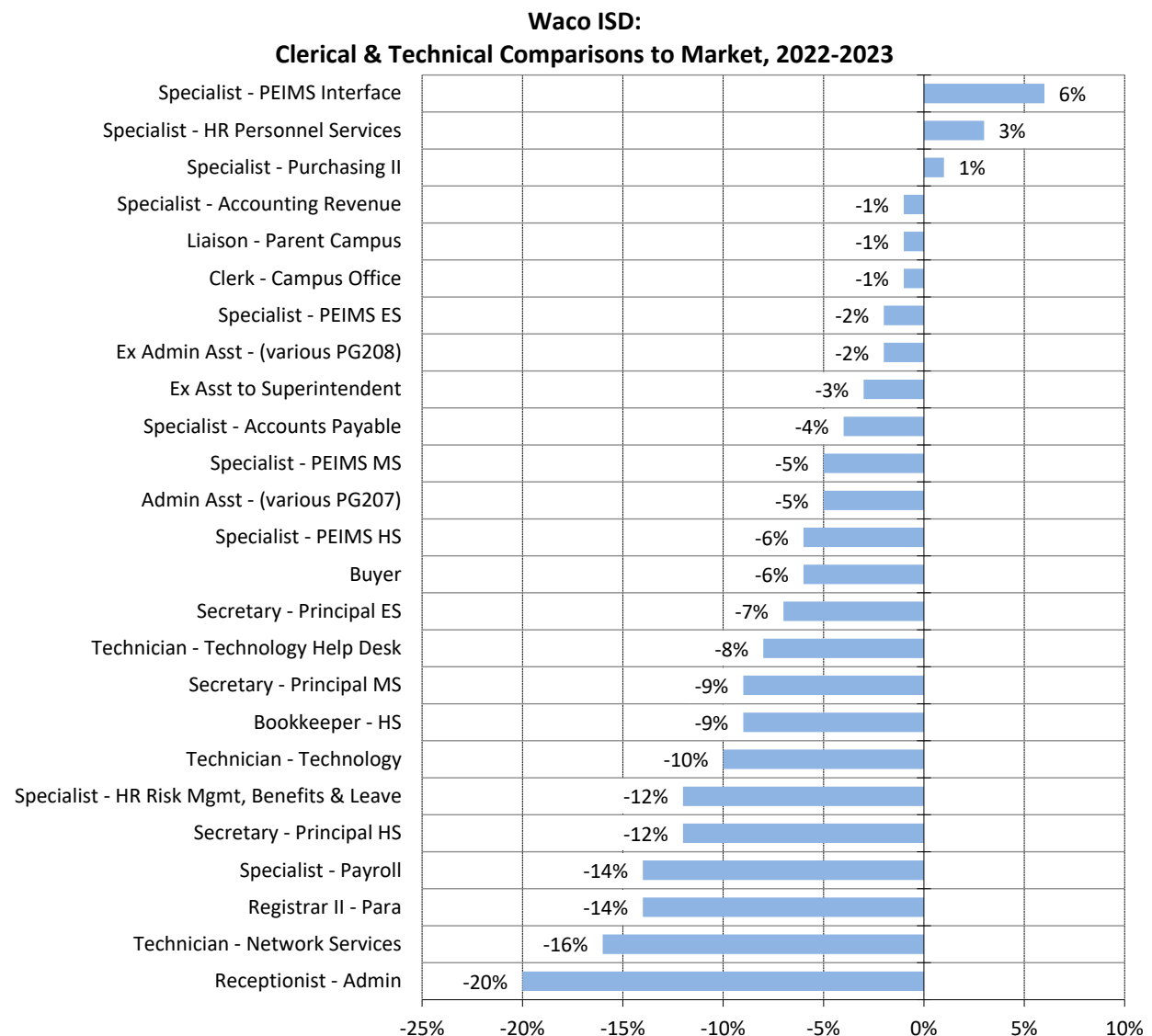
Across benchmark professional positions, WISD is 99 of market, on average. Jobs within this group range from 17 percent below market to 20 percent above market medians. Four jobs in this group are more than 10 percent below market, three of which are in technology.



Clerical & Technical Market Comparison

Across benchmark clerical and technical jobs, the district is paying 94 percent of market, on average. Individual jobs range from 20 percent below market median to 6 percent above market median. Six jobs in this group are paid more than 10 percent below market with receptionist-admin comparing 20 percent below market.

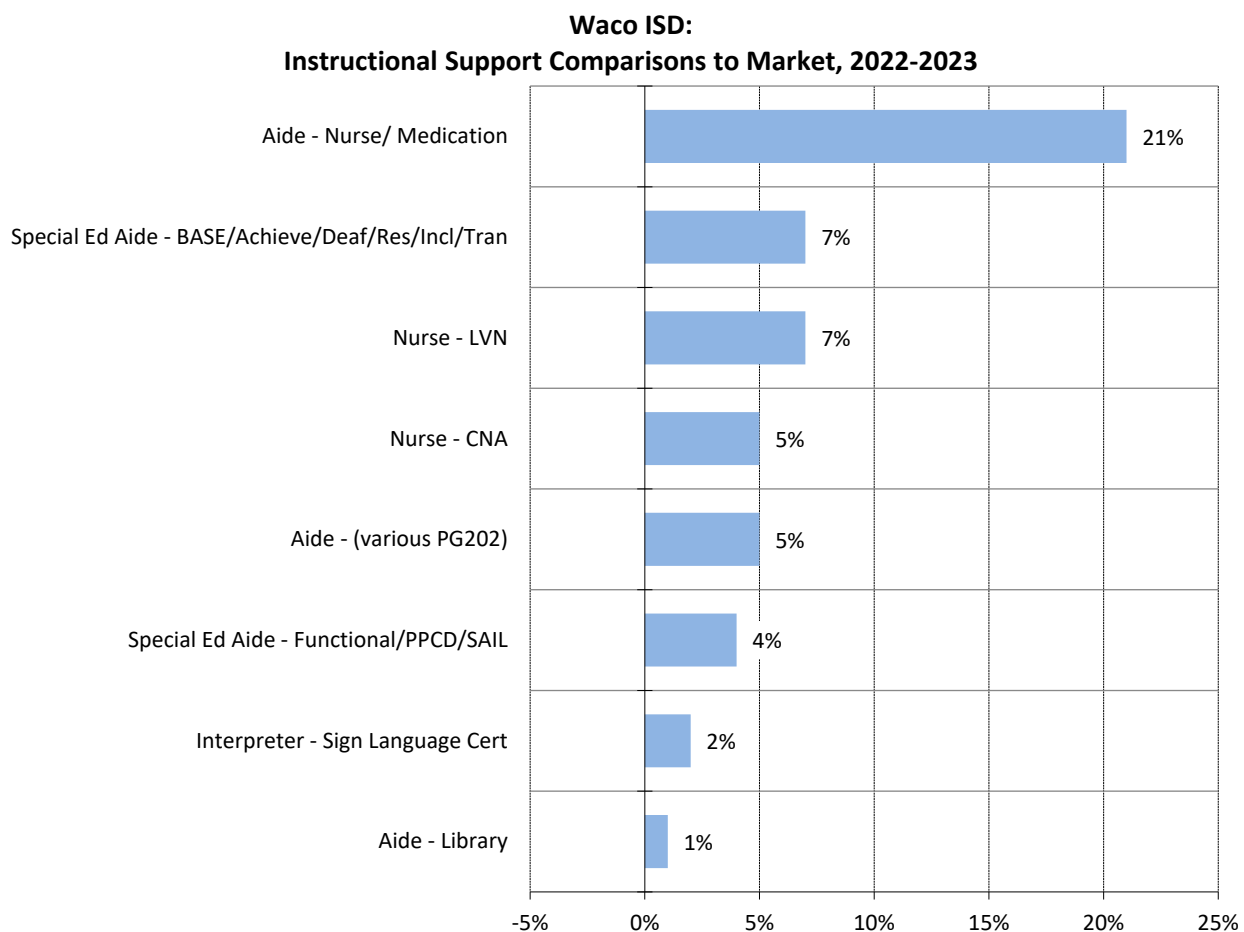
Pay range minimums are 10 percent below market, on average. Raising starting rates may help to align positions that fall below market.



Instructional Support Market Comparison

Across benchmark instructional support jobs, the district is paying 107 percent of market, on average. Individual jobs range between 1 and 21 percent above market median. The instructional support group is paid strong to market and is the most competitive employee group in the district overall.

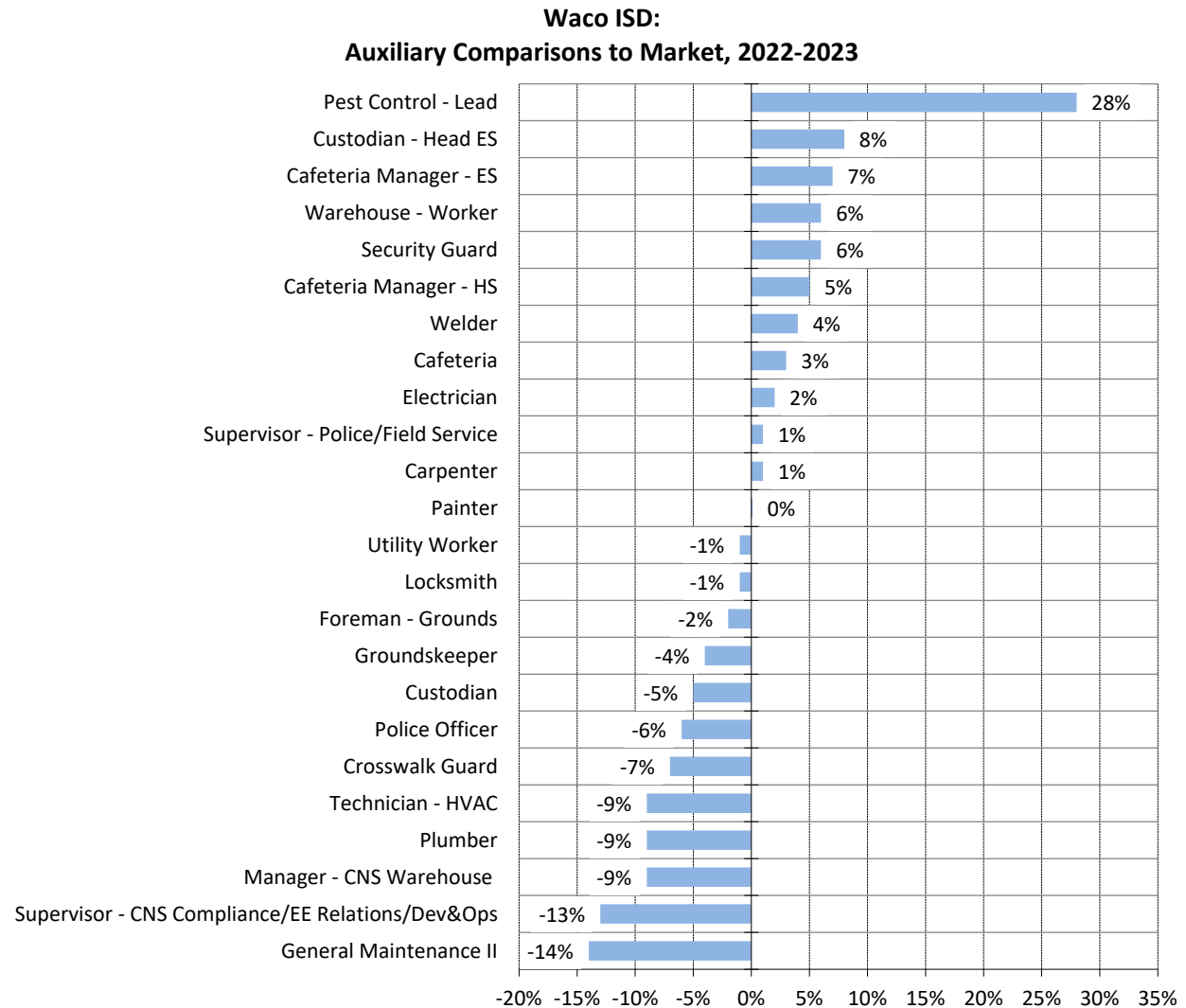
Pay range minimums are 1 percent below market, on average. Raising starting rates may help to align any positions that fall below market. For this group, starting rates for classroom teacher aides are 8 percent below market and LVNs are 1 percent below market. All other starting rates are competitive.



Auxiliary Market Comparison

Across benchmark auxiliary jobs, the district is paying 100 percent of market, on average. Individual jobs range between 14 percent below and 28 percent above market median. Two jobs in this group compare more than 10 percent below market.

Pay range minimums are 3 percent below market, on average. Raising starting rates may help to align any positions that fall below market.



SUMMARY AND RECOMMENDATIONS

Summary

Waco ISD continues to make strong efforts to maintain market competitiveness and internal pay equity for all employee pay groups. The district continues to refine employee pay systems to support the district's recruitment and retention efforts.

Recommendations

Following is a listing of recommendations for the Waco ISD compensation plan.

Recommendation 1

Adopt the proposed pay plans with adjustments for 2023–2024. The recommended plans provide strong starting salaries, midpoints aligned with market values, and jobs aligned within the pay structures.

Recommendation 2

Implement one of the proposed pay increase models to improve market competitiveness. The characteristics of each model are described in the next sections along with specific details for each model. Three increase models are proposed to allow for flexibility in district financial planning for the following school year.

Recommendation 3

Provide adjustments to improve market competitiveness and maintain internal pay equity.

Recommended adjustments include:

- Adjustments to the teacher hiring schedule to ensure there is a reasonable differential between years.
- Adjustments to 1 percent above the proposed pay grade minimum for employees whose pay is still below the minimum after the general pay increase is applied.
- Adjustments for employees in the educator career pathway to ensure pay is at least 3 percent above the daily rate of a teacher with the same experience.
- Strategic adjustments for employees in the paraprofessional and auxiliary groups that provide 1 percent of midpoint for anyone whose pay is less than 90 percent of midpoint after other adjustments are applied.
- Placement scale adjustments for employees in the nonexempt pay groups that align pay by experience. Placement scales divide the minimum and midpoint by 20 years of experience.

Recommendation 4

Consider increasing teaching area stipends to improve recruitment and retention efforts in hard-to-fill areas.

- Increase the bilingual teacher stipend from \$6,000 to \$7,000.

Recommendation 5:

The district should consider freezing the pay rates of employees already paid at or above the maximum of their assigned pay grade. By honoring the pay grade maximums, the district can control pay equity and help maintain the integrity of the overall pay system.

Recommendation 6:

Continue to conduct an annual review of the compensation plan to ensure market competitiveness and maintain internal equity.

MODEL 1

The following pages include a summary cost estimate and proposed teacher hiring schedule for **Model 1**. The proposed pay plans for exempt and nonexempt pay groups are located in the Proposed Pay Plans section of this report.

- Teachers receive a 1.0 percent of market general pay increase (GPI), equal to a \$600 increase per continuing teacher
 - Additional adjustments to teacher hiring schedule in years 1 and 2 to ensure a reasonable differential between years
- Other pay groups, including administrative/professional, paraprofessional, and auxiliary, receive a 1.0 percent of midpoint GPI

	Total Staff	Count of Increases	Cost Increase	Percent of Current Costs	2022-2023 Current Costs
Teachers					
\$51,925 starting salary	962		\$598,911		\$53,182,719
^{1c} 1.0% general pay increase (\$600)		962	\$573,929	1.1%	
Adjustments to years 1-2		156	\$24,982	0.0%	
Administrative Professional	454		\$497,170		\$33,212,202
^{1c} 1.0% of pay range midpoint increase		446	\$343,067	1.0%	
1.0% increase to employees over range max		8	\$5,593	0.0%	
Adjustments to 1.0% above pay range minimum		18	\$55,951	0.2%	
Teacher pay equity adjustments		32	\$28,923	0.1%	
Strategic adjustments		87	\$63,636	0.2%	
Clerical Paraprofessional	510		\$314,426		\$13,961,951
^{1c} 1.0% of pay range midpoint increase		504	\$149,826	1.1%	
1.0% increase to employees over range max		6	\$1,361	0.0%	
Adjustments to 1.0% above pay range minimum		72	\$47,157	0.3%	
Placement scale adjustments		128	\$116,082	0.8%	
Auxiliary	293		\$458,143		\$8,236,098
^{1c} 1.0% of pay range midpoint increase		291	\$92,718	1.1%	
1.0% increase to employees over range max		2	\$907	0.0%	
Adjustments to 1.0% above pay range minimum		101	\$122,035	1.5%	
Placement scale adjustments		167	\$242,483	2.9%	
Subtotal - General Pay Increase	2,219	2,219	\$1,167,401	1.1%	
Subtotal - Implementation/Equity Adjustments		761	\$701,249	0.6%	
Total Cost Estimate			\$1,868,650	1.7%	\$108,592,970

Footnotes:

^{1c} Pay increases were applied to all employees and itemized separately for employees at or above the maximum rate.

Waco ISD

2023-2024 New Hire Guide for Teachers

Model 1: \$51,925 starting, 1.0% GPI

Years of Experience	New Hire Salary
0	\$51,925
1	\$52,275
2	\$52,625
3	\$52,975
4	\$53,425
5	\$53,925
6	\$54,425
7	\$54,925
8	\$55,425
9	\$55,925
10	\$56,425
11	\$56,825
12	\$57,225
13	\$57,625
14	\$58,025
15	\$58,425
16	\$58,825
17	\$59,325
18	\$59,825
19	\$60,325
20	\$60,825
21	\$61,325
22	\$61,825
23	\$62,225
24	\$62,625
25	\$63,025
26	\$63,425
27+	\$63,825

Continuing Teachers will receive an increase of
\$600

The salaries listed above are based on 10-month employment for the 2023-2024 school year. Salary plans are determined on an annual basis and salary advancement is not guaranteed. Pay increases are based on the annual pay raise budget approved by the Board of Trustees.

MODEL 2

The following pages include a summary cost estimate and proposed teacher hiring schedule for **Model 2**. The proposed pay plans for exempt and nonexempt pay groups are located in the Proposed Pay Plans section of this report.

- Teachers receive a 2.0 percent of market general pay increase (GPI), equal to a \$1,175 increase per continuing teacher
 - Additional adjustments to teacher hiring schedule in years 1 and 2 to ensure a reasonable differential between years
- Other pay groups, including administrative/professional, clerical/ paraprofessional, and auxiliary, receive a 2.0 percent of midpoint GPI

	Total Staff	Count of Increases	Cost Increase	Percent of Current Costs	2022-2023 Current Costs
Teachers					
\$52,500 starting salary	962		\$1,148,730		\$53,182,719
^{1c} 2.0% general pay increase (\$1,175)		962	\$1,123,718	2.1%	
Adjustments to years 1-2		156	\$25,012	0.0%	
Administrative Professional	454		\$815,151		\$33,212,202
^{1c} 2.0% of pay range midpoint increase		444	\$685,020	2.1%	
2.0% increase to employees over range max		10	\$12,258	0.0%	
Adjustments to 1.0% above pay range minimum		13	\$45,039	0.1%	
Teacher pay equity adjustments		29	\$28,115	0.1%	
Strategic adjustments		60	\$44,719	0.1%	
Clerical Paraprofessional	510		\$418,662		\$13,961,951
^{1c} 2.0% of pay range midpoint increase		504	\$299,226	2.1%	
2.0% increase to employees over range max		6	\$2,813	0.0%	
Adjustments to 1.0% above pay range minimum		61	\$29,836	0.2%	
Placement scale adjustments		85	\$86,787	0.6%	
Auxiliary	293		\$494,932		\$8,236,098
^{1c} 2.0% of pay range midpoint increase		291	\$184,513	2.2%	
2.0% increase to employees over range max		2	\$1,814	0.0%	
Adjustments to 1.0% above pay range minimum		92	\$96,306	1.2%	
Placement scale adjustments		152	\$212,299	2.6%	
Subtotal - General Pay Increase	2,219	2,219	\$2,309,362	2.1%	
Subtotal - Implementation/Equity Adjustments		648	\$568,113	0.5%	
Total Cost Estimate			\$2,877,475	2.6%	\$108,592,970

Footnotes:

^{1c} Pay increases were applied to all employees and itemized separately for employees at or above the maximum rate.

Waco ISD

2023-2024 New Hire Guide for Teachers

Model 2: \$52,500 starting, 2.0% GPI

Years of Experience	New Hire Salary
0	\$52,500
1	\$52,850
2	\$53,200
3	\$53,550
4	\$54,000
5	\$54,500
6	\$55,000
7	\$55,500
8	\$56,000
9	\$56,500
10	\$57,000
11	\$57,400
12	\$57,800
13	\$58,200
14	\$58,600
15	\$59,000
16	\$59,400
17	\$59,900
18	\$60,400
19	\$60,900
20	\$61,400
21	\$61,900
22	\$62,400
23	\$62,800
24	\$63,200
25	\$63,600
26	\$64,000
27+	\$64,400

Continuing Teachers will receive an increase of
\$1,175

The salaries listed above are based on 10-month employment for the 2023-2024 school year. Salary plans are determined on an annual basis and salary advancement is not guaranteed. Pay increases are based on the annual pay raise budget approved by the Board of Trustees.

MODEL 3

The following pages include a summary cost estimate and proposed teacher hiring schedule for **Model 3**. The proposed pay plans for exempt and nonexempt pay groups are located in the Proposed Pay Plans section of this report.

- Teachers receive a 3.0 percent of market general pay increase (GPI), equal to a \$1,750 increase per continuing teacher
 - Additional adjustments to teacher hiring schedule at year 1 to ensure a reasonable differential between years
- Other pay groups, including administrative/professional, clerical/ paraprofessional, and auxiliary, receive a 3.0 percent of midpoint GPI

	Total Staff	Count of Increases	Cost Increase	Percent of Current Costs	2022-2023 Current Costs
Teachers					
\$52,975 starting salary	962		\$1,683,094		\$53,182,719
^{1c} 3.0% general pay increase (\$1,750)		962	\$1,673,689	3.1%	
Adjustments to years 1		94	\$9,405	0.0%	
Administrative Professional	454		\$1,140,828		\$33,212,202
^{1c} 3.0% of pay range midpoint increase		444	\$1,026,075	3.1%	
3.0% increase to employees over range max		10	\$19,794	0.1%	
Adjustments to 1.0% above pay range minimum		9	\$37,205	0.1%	
Teacher pay equity adjustments		29	\$27,295	0.1%	
Strategic adjustments		42	\$30,459	0.1%	
Clerical Paraprofessional	510		\$534,820		\$13,961,951
^{1c} 3.0% of pay range midpoint increase		500	\$448,699	3.2%	
3.0% increase to employees over range max		10	\$4,696	0.0%	
Adjustments to 1.0% above pay range minimum		38	\$16,140	0.1%	
Placement scale adjustments		63	\$65,285	0.5%	
Auxiliary	293		\$537,354		\$8,236,098
^{1c} 3.0% of pay range midpoint increase		291	\$276,985	3.4%	
3.0% increase to employees over range max		2	\$2,741	0.0%	
Adjustments to 1.0% above pay range minimum		82	\$73,411	0.9%	
Placement scale adjustments		142	\$184,217	2.2%	
Subtotal - General Pay Increase	2,219	2,219	\$3,452,679	3.2%	
Subtotal - Implementation/Equity Adjustments		499	\$443,417	0.4%	
Total Cost Estimate			\$3,896,096	3.6%	\$108,592,970

Footnotes:

^{1c} Pay increases were applied to all employees and itemized separately for employees at or above the maximum rate.

Waco ISD

2023-2024 New Hire Guide for Teachers

Model 3: \$52,975 starting, 3.0% GPI

Years of Experience	New Hire Salary
0	\$52,975
1	\$53,325
2	\$53,675
3	\$54,125
4	\$54,575
5	\$55,075
6	\$55,575
7	\$56,075
8	\$56,575
9	\$57,075
10	\$57,575
11	\$57,975
12	\$58,375
13	\$58,775
14	\$59,175
15	\$59,575
16	\$59,975
17	\$60,475
18	\$60,975
19	\$61,475
20	\$61,975
21	\$62,475
22	\$62,975
23	\$63,375
24	\$63,775
25	\$64,175
26	\$64,575
27+	\$64,975

Continuing Teachers will receive an increase of
\$1,750

The salaries listed above are based on 10-month employment for the 2023-2024 school year. Salary plans are determined on an annual basis and salary advancement is not guaranteed. Pay increases are based on the annual pay raise budget approved by the Board of Trustees.

PROPOSED PAY PLANS

2023-2024 Proposed Administrative Professional Pay Plan

Waco ISD

Pay Grade	Current Grade	Job Title	Calendars	Minimum	Midpoint	Maximum	
101				Daily	\$239.90	\$288.00	\$336.10
101		Coordinator - ARP Homeless Outreach Program	203	153 Days	36,705	44,064	51,423
101		Coordinator - Attendance & Truancy	202	193 Days	46,301	55,584	64,867
101		Coordinator - PDS	153	202 Days	48,460	58,176	67,892
101		Coordinator - Special Programs	207	203 Days	48,700	58,464	68,228
101		Facilitator - Restorative Discipline	202, 226	207 Days	49,659	59,616	69,573
101		Facilitator - Restorative Justice	226	212 Days	50,859	61,056	71,253
101		Lead Parent Educator	202	226 Days	54,217	65,088	75,959
101		Liaison - Parent & Community Support	226				
101		LSPSP Case Manager	202				
101		LSSP - Intern	202				
101		Manager - Afterschool	226				
101		Manager - Afterschool/ Summer Enrichment	226				
101		Manager - Athletic Scheduling & Equipment	226				
101		Parent Educator	202				
101		Parent Educator - Inspiracion	202				
101		Practicum Student - Behavior	193				
101		Specialist - Campus Parent/ Community Involvement	212, 226				
101		Specialist - Child Nutrition Services	226				
101		Specialist - Community School	207, 226				
101		Specialist - Dropout Credit Recovery	212				
101		Specialist - Homeless Student	203				
101		Specialist - Inspiracion Program	226				
101		Specialist - Records Management	226				
101		Strength & Conditioning Coach	226				
102				Daily	\$263.89	\$316.80	\$369.71
102		Accountant - Business Services	226	187 Days	49,347	59,242	69,136
102		Accountant - Grants	226	188 Days	49,611	59,558	69,505
102		Analyst - Information Support System	226	202 Days	53,306	63,994	74,681
102		Behavior Analyst - Intern	212	203 Days	53,570	64,310	75,051
102		Coordinator - Afterschool Program Support & Curriculum	226	207 Days	54,625	65,578	76,530
102		Coordinator - Librarian & Technology Supervisor	212	212 Days	55,945	67,162	78,379
102		Facilitator - HR	226	226 Days	59,639	71,597	83,554
102		Facilitator - Technology	202	240 Days	63,334	76,032	88,730
102		Homeless Students Population Specialist	187				
102		Interventionist - At-Risk Students	226				
102		Library Media Specialist	188				
102		Library Media Specialist	188				
102		Library Media Specialist PK-8	188				
102		Manager - Energy	226				
102		Manager - Television Production	226				
102		Network Infrastructure Engineer	226				
102		Network Systems Engineer	226				
102		Specialist - Afterschool Program	226				
102		Specialist - At-Risk Students	203, 207				
102		Specialist - Behavior Intervention	207				
102		Specialist - Campus Testing	187				
102		Specialist - College Career Military Readiness	212				
102		Specialist - Information Systems	226				
102		Specialist - Public Relations	226				
102		Specialist - Threat Assessment & Violence Prevention	212				
102		Specialist - Transition	202				
102		Speech Pathologist - Asst	187				
102		Supervisor - Facilities & Preventive Maintenance	240				

2023-2024 Proposed Administrative Professional Pay Plan

Waco ISD

Pay Grade	Current Grade	Job Title	Calendars	Minimum	Midpoint	Maximum
	102	Supervisor - Maintenance & Hazardous Materials	240			
	102	Supervisor - Warehouse	240			
	102	Systems Engineer	226			
103						
	103	Administrator In Residence	207	187 Days	53,295	63,980
	103	Analyst - Data	207	188 Days	53,580	64,322
	103	Athletic Trainer	202	190 Days	54,150	65,007
	103	Coordinator - Custodial & IPM	240	193 Days	55,005	66,033
	103	Counselor - ES	190	202 Days	57,570	69,112
	103	Counselor - ES At-Risk Students	190	203 Days	57,855	69,454
	103	Counselor - MS	203, 212	207 Days	58,995	70,823
	103	Counselor - Special Education	190	212 Days	60,420	72,534
	103	ESL Strategist/ Interventionist	187	226 Days	64,410	77,324
	103	ESL Strategist/ Interventionist - HS	187	240 Days	68,400	82,114
	103	Facilitator - ARD	202			
	103	Facilities - Construction Manager	226			
	103	Instructional Coach - Kindergarten & First Grade	207			
	103	Instructional Coach - Montessori Secondary	202			
	103	Instructional Coach - Pre-K & Kindergarten	207			
	103	Instructional Specialist	202			
	103	Instructional Specialist - Dyslexia	187			
	103	Instructional Specialist - ELA	202			
	103	Instructional Specialist - ELAR/SS	202			
	103	Instructional Specialist - English	202			
	103	Instructional Specialist - Math	202			
	103	Instructional Specialist - Math/Science	202			
	103	Instructional Specialist - RDSPD	202			
	103	Instructional Specialist - Science	202			
	103	Instructional Specialist - Science/ELAR/SS	202			
	103	Instructional Specialist - Science/Social Studies	202			
	103	Instructional Specialist - Supplemental	212			
	103	Instructional Specialist - Support For Teachers/ Students	202			
	103	Instructional Specialist - Technology	202			
	103	Liaison - Parent & Community Support	226			
	103	Librarian - ES	188			
	103	Librarian - HS	193			
	103	Librarian - MS	188			
	103	Master Teacher	202			
	103	Master Teacher - Blended Learning	202			
	103	Nurse - RN	187			
	103	Reading Recovery Lead	202			
	103	Social Worker - Parent/ Community Involvement	202			
	103	Special Education	202			
	103	Specialist - Data	207			
	103	Specialist - Transition	202			
	103	Supervisor - Community Outreach For Homeless Students	203			
	103	Supervisor - Payroll	226			
	103	Supervisor - Risk Management & Benefits	226			
104						
	104	Asst Principal - ES	207	187 Days	57,559	69,098
	104	Asst Project Manager - Operations	226	190 Days	58,482	70,207
	104	Behavior Analyst - BCBA	212	196 Days	60,329	72,424
	104	Counselor - Challenge Academy	190	202 Days	62,176	74,641

2023-2024 Proposed Administrative Professional Pay Plan

Waco ISD

Pay Grade	Current Grade	Job Title	Calendars		Minimum	Midpoint	Maximum	
	104	Counselor - GWAHCA	212	203 Days	62,483	75,011	87,538	
	104	Counselor - GWAMA	212		207 Days	63,715	76,489	89,263
	104	Counselor - HS	203		212 Days	65,254	78,336	91,419
	104	Counselor - HS Lead	226		226 Days	69,563	83,509	97,456
	104	Diagnostician	202					
	104	Licensed Specialist School Psychology	202					
	104	Occupational Therapist	190					
	104	School Social Worker - Clinical	226					
	104	Speech Pathologist - ASHA	187, 196					
	104	Supervisor - Police/Field Service	226					
105				Daily	\$323.20	\$387.99	\$452.78	
	105	Asst Principal - DAEP	226	207 Days	66,902	80,314	93,725	
	105	Asst Principal - HS	207	212 Days	68,518	82,254	95,989	
	105	Asst Principal - MS	207, 226	226 Days	73,043	87,686	102,328	
	105	Coordinator - Advanced Academics	226					
	105	Coordinator - Athletics MS	226					
	105	Coordinator - Bilingual	212					
	105	Coordinator - C&I	226					
	105	Coordinator - Communications	207					
	105	Coordinator - Counseling & SEL	226					
	105	Coordinator - District Reading	226					
	105	Coordinator - English Language Learner	207					
	105	Coordinator - Hst Curriculum & Certifications	226					
	105	Coordinator - Instructional Technology	226					
	105	Coordinator - Librarian	212					
	105	Coordinator - Professional Development	226					
	105	Coordinator - RDSPD	226					
	105	Coordinator - Special Education	226					
	105	Coordinator - State & Federal Programs	226					
	105	Coordinator - Student Management	226					
	105	Coordinator - Technology Support Services	226					
	105	Coordinator - Testing & Assessments	226					
	105	Coordinator - TW Nonprofit Systems	226					
	105	Coordinator- Compliance & Response To Intervention	226					
	105	Dean - Instruction MS	226					
	105	Dean - Student Services MS	226					
	105	Senior Security Systems Engineer	226					
	105	Senior Systems Engineer	226					
	105	Supervisor - Police/Administrative Services	226					
106				Daily	\$365.21	\$438.43	\$511.65	
	106	Assoc Principal - HS	226	207 Days	75,598	90,755	105,912	
	106	Asst Director - Athletics	226	226 Days	82,537	99,085	115,633	
	106	Asst Director - HR	226					
	106	Asst Director - Maintenance	226					
	106	Asst Principal - HS	207, 226					
	106	Chief of Police	226					
	106	Dean - Academies	226					
	106	Dean - FEA	226					
	106	Dean - GWAHCA	226					
	106	Dean - GWAMA	226					
	106	Dean - Instruction HS	226					
	106	Director - Accountability & Data Analysis	226					
	106	Director - Accounting	226					

2023-2024 Proposed Administrative Professional Pay Plan

Waco ISD

Pay Grade	Current Grade	Job Title	Calendars	Minimum	Midpoint	Maximum
106		Director - Advanced Academics	226			
106		Director - Early Childhood Education	226			
106		Director - Extended Learning & Enrichment Programs	226			
106		Director - Network Systems	226			
106		Director - Opportunity Culture	226			
106		Director - PEIMS/Attendance/Data Analytics	226			
106		Director - Purchasing/ Warehouse/ Distribution Services	226			
106		Director - Reseach/ Data/ Evaluation/ Assessment	226			
106		Director - Strategic Evaluation Systems & Support	226			
106		Director - Strategic Planning & Communications	226			
106		Director - Wrap-Around Services	226			
106		Principal - Credit Recovery	226			
106		Principal - ES	226			
107						
107		Athletic Sector Coordinator - Head Football Coach	226			
107		Director - Attendance & Outreach	226			
107		Director - Bilingual/ ESL	226			
107		Director - Career & Technology Education	226			
107		Director - Challenge Academy	226			
107		Director - Facilities & Maintenance	226			
107		Director - Fine Arts	226			
107		Director - Health Services	226			
107		Director - HR	226			
107		Director - Intervention Services & State And Fed. Programs	226			
107		Director - Professional Development TZ	226			
107		Director - Special Education	226			
107		Principal - MS	226			
107		Principal - Secondary DAEP	226			
108						
108		Chief Communications Officer	226			
108		Director - Athletics	226			
108		Exec Director - Communications	226			
108		Exec Director - Curriculum & Professional Development	226			
108		Exec Director - Elementary Education	226			
108		Exec Director - Finance	226			
108		Exec Director - HR	226			
108		Exec Director - Secondary Education	226			
108		Exec Director - Special Education	226			
108		Exec Director - Student Advocacy	226			
108		Exec Director - Student Services	226			
108		Exec Director - Student Support	226			
108		Principal - HS	226			

Daily	\$401.43	\$477.89	\$554.35
226 Days	90,723	108,003	125,283

Daily	\$449.60	\$535.24	\$620.88
226 Days	101,610	120,964	140,319

2023-2024 Proposed Administrative Professional Pay Plan

Waco ISD

Pay Grade	Current Grade	Job Title	Calendars	Minimum	Midpoint	Maximum
109						
	109	Asst Superintendent - C&I	226			
	109	Asst Superintendent - HR	226			
	109	Asst Superintendent - Student Services	226			
	109	Chief Facilities & Operations Officer	226			
	109	Chief Financial Officer	226			
	109	Chief Technology Officer	226			
110						
	110	Chief of Staff	226			
	110	Deputy Superintendent	226			

Daily	\$557.51	\$663.70	\$769.89
226 Days	125,997	149,996	173,995

Daily	\$641.14	\$763.26	\$885.38
226 Days	144,898	172,497	200,096

2023-2024 Proposed Clerical-Paraprofessional Pay Plan

Waco ISD

*Annual amounts are based on 8 hours per day.

Pay Grade	Current Grade	Job Title	Calendars	Minimum	Midpoint	Maximum	
201				Hourly	\$12.50	\$15.06	\$17.62
	201	After School - Worker	207	193 Days	19,300	23,253	27,205
	201	Receptionist - Campus	193	207 Days	20,700	24,939	29,179
202				Hourly	\$14.00	\$16.87	\$19.74
	202	After School - Fitness Worker	187	187 Days	20,944	25,238	29,531
	202	Aide - Behavior Support	187	188 Days	21,056	25,372	29,689
	202	Aide - Bilingual Instructional	187				
	202	Aide - Child Care	187				
	202	Aide - Inspiracion Classroom Asst	187				
	202	Aide - Instructional	187				
	202	Aide - Instructional - Compensatory	187				
	202	Aide - Instructional (SIT)	187				
	202	Aide - Instructional Math	187				
	202	Aide - ISS	187				
	202	Aide - Library	187, 188				
	202	Aide - Nurse/ Medication	187				
	202	Aide - PE	187				
	202	Aide - Pre-K	187				
	202	Aide - Pre-K/ Bilingual	187				
	202	Aide - Pre-K/ Kindergarden	187				
	202	Aide - Primary Literacy	187				
	202	Aide - Reset Classroom	187				
	202	Aide - Student Services	187				
	202	Associate - Reach	187				
	202	Nurse - CNA	187				
	202	Teacher Resident	187				
203				Hourly	\$15.00	\$18.07	\$21.14
	203	Aide - Special Ed - FA/Achieve	187	187 Days	22,440	27,033	31,625
	203	Aide - Sped	187	193 Days	23,160	27,900	32,640
	203	Aide - Sped - 18-21 Transition	187	202 Days	24,240	29,201	34,162
	203	Aide - Sped - Achieve	187	212 Days	25,440	30,647	35,853
	203	Aide - Sped - Aspire	187	226 Days	27,120	32,671	38,221
	203	Aide - Sped - Deaf Ed	187				
	203	Aide - Sped - Early Childhood	187				
	203	Aide - Sped - ECSE	187				
	203	Aide - Sped - FA	187				
	203	Aide - Sped - FA/Aspire	187				
	203	Aide - Sped - Inclusion	187				
	203	Aide - Sped - Resource/Inclusion	187				
	203	Aide - Sped - Sail	187				
	203	Bilingual Asst - Sped	202				
	203	Clerk - Athletic	212				
	203	Clerk - Campus Office	193				
	203	Clerk - English Learners Dept Testing	226				
	203	Clerk - HR	226				
	203	Clerk - Sped	202				
	203	Receptionist - Admin	226				

2023-2024 Proposed Clerical-Paraprofessional Pay Plan

Waco ISD

*Annual amounts are based on 8 hours per day.

Pay Grade	Current Grade	Job Title	Calendars	Minimum	Midpoint	Maximum	
204				Hourly	\$15.90	\$19.16	\$22.42
204		Liaison - Parent Campus	193	193 Days	24,550	29,583	34,616
204		Secretary - Principal ES	226	196 Days	24,931	30,043	35,155
204		Specialist - Parent Involvement	202	202 Days	25,694	30,963	36,231
204		Specialist - PEIMS ES	196	226 Days	28,747	34,641	40,535
204		Specialist - PEIMS HS	196				
204		Specialist - PEIMS MS	196				
205				Hourly	\$17.20	\$20.72	\$24.24
205		Registrar II - Para	226	226 Days	31,098	37,462	43,826
205		Secretary - Principal Challenge	226				
205		Secretary - Principal DAEP	226				
205		Secretary - Principal GWAHCA	226				
205		Secretary - Principal GWAMA	226				
205		Secretary - Principal MS	226				
206				Hourly	\$18.40	\$22.17	\$25.94
206		Bookkeeper - HS	226	187 Days	27,526	33,166	38,806
206		Child Care Director	187	226 Days	33,267	40,083	46,900
206		Interpreter - Sign Language Noncertified	187				
206		Secretary - Principal HS	226				
206		Specialist - Police Support Services	226				
206		Specialist - Warehouse	226				
207				Hourly	\$19.90	\$23.97	\$28.04
207		Admin Asst - Athletics	226	187 Days	29,770	35,859	41,948
207		Admin Asst - Bernard & Audre Rapport Vision Center	202	202 Days	32,158	38,736	45,313
207		Admin Asst - Bilingual	226	226 Days	35,979	43,338	50,696
207		Admin Asst - Career & Technology Education	226				
207		Admin Asst - CNS	226				
207		Admin Asst - Custodial Services	226				
207		Admin Asst - Fine Arts	226				
207		Admin Asst - Homeless Department	187				
207		Admin Asst - Maintenance	226				
207		Admin Asst - Police	226				
207		Admin Asst - Student Management	226				
207		Bookkeeper - Athletics	226				
207		Nurse - LVN	187				
207		Specialist - Accounting Revenue	226				
207		Specialist - Accounts Payable	226				
207		Specialist - Bilingual Assessor	226				
207		Specialist - HR Personnel Services	226				
207		Specialist - HR Risk Mgmt, Benefits & Leave	226				
207		Specialist - HR Substitute Mgmt	226				
207		Specialist - Maintenance Business	226				
207		Specialist - Payroll	226				
207		Specialist - Purchasing II	226				
207		Specialist - Special Ed - PEIMS	226				
207		Technician - Network Services	226				
207		Technician - Technology	226				
207		Technician - Technology Help Desk	226				

2023-2024 Proposed Clerical-Paraprofessional Pay Plan

Waco ISD

*Annual amounts are based on 8 hours per day.

Pay Grade	Current Grade	Job Title	Calendars	Minimum	Midpoint	Maximum
208						
208	Ex Admin Asst - Business & Financial Services	226				
208	Ex Admin Asst - C&I	226				
208	Ex Admin Asst - Communications	226				
208	Ex Admin Asst - HR	226				
208	Ex Admin Asst - Ops	226				
208	Ex Admin Asst - Sped	226				
208	Ex Admin Asst - Student Services	226				
208	Ex Admin Asst - Technology Services	226				
208	Ex Admin Asst - TW	226				
208	Interpreter - Sign Language Certified	187				
208	Specialist - Admin Budget	226				
208	Specialist - PEIMS Interface	226				
208	Technician - Communication Systems	226				
209						
209	Asst - OT	187				
209	Buyer	226				
209	Ex Asst to Superintendent	226				
209	Specialist - Budget	226				
209	Specialist - PEIMS Interface Student Services	226				

Hourly	\$22.50	\$27.11	\$31.72
187 Days	33,660	40,557	47,453
226 Days	40,680	49,015	57,350

Hourly	\$26.30	\$31.69	\$37.08
187 Days	39,345	47,408	55,472
226 Days	47,550	57,296	67,041

2023-2024 Clerical-Paraprofessional Placement Scale

Waco ISD

Placement scales are used to establish a minimum rate for new hires based on experience approved by the district. Current employees may be paid above this placement scale. This scale is for placement of new hires only. Future wage increases are determined annually and are not guaranteed.

Range Position	2023-2024 Total Exp	Pay Grades								
		201	202	203	204	205	206	207	208	209
Minimum	0	\$12.50	\$14.00	\$15.00	\$15.90	\$17.20	\$18.40	\$19.90	\$22.50	\$26.30
	1	\$12.63	\$14.14	\$15.15	\$16.06	\$17.38	\$18.59	\$20.10	\$22.73	\$26.57
	2	\$12.75	\$14.28	\$15.30	\$16.22	\$17.55	\$18.77	\$20.30	\$22.96	\$26.83
	3	\$12.87	\$14.42	\$15.45	\$16.38	\$17.72	\$18.95	\$20.50	\$23.19	\$27.09
	4	\$12.99	\$14.56	\$15.60	\$16.54	\$17.89	\$19.13	\$20.70	\$23.42	\$27.35
	5	\$13.11	\$14.70	\$15.75	\$16.70	\$18.06	\$19.31	\$20.90	\$23.65	\$27.61
	6	\$13.23	\$14.84	\$15.90	\$16.86	\$18.23	\$19.49	\$21.10	\$23.88	\$27.87
	7	\$13.35	\$14.98	\$16.05	\$17.02	\$18.40	\$19.67	\$21.30	\$24.11	\$28.13
	8	\$13.47	\$15.12	\$16.20	\$17.18	\$18.57	\$19.85	\$21.50	\$24.34	\$28.39
	9	\$13.59	\$15.26	\$16.35	\$17.34	\$18.74	\$20.03	\$21.70	\$24.57	\$28.65
	10	\$13.71	\$15.40	\$16.50	\$17.50	\$18.91	\$20.21	\$21.90	\$24.80	\$28.91
	11	\$13.83	\$15.54	\$16.65	\$17.66	\$19.08	\$20.39	\$22.10	\$25.03	\$29.17
	12	\$13.95	\$15.68	\$16.80	\$17.82	\$19.25	\$20.57	\$22.30	\$25.26	\$29.43
	13	\$14.07	\$15.82	\$16.95	\$17.98	\$19.42	\$20.75	\$22.50	\$25.49	\$29.69
	14	\$14.19	\$15.96	\$17.10	\$18.14	\$19.59	\$20.93	\$22.70	\$25.72	\$29.95
	15	\$14.31	\$16.10	\$17.25	\$18.30	\$19.76	\$21.11	\$22.90	\$25.95	\$30.21
	16	\$14.43	\$16.24	\$17.40	\$18.46	\$19.93	\$21.29	\$23.10	\$26.18	\$30.47
	17	\$14.55	\$16.38	\$17.55	\$18.62	\$20.10	\$21.47	\$23.30	\$26.41	\$30.73
	18	\$14.67	\$16.52	\$17.70	\$18.78	\$20.27	\$21.65	\$23.50	\$26.64	\$30.99
	19	\$14.79	\$16.66	\$17.85	\$18.94	\$20.44	\$21.83	\$23.70	\$26.87	\$31.25
Midpoint	20	\$15.06	\$16.87	\$18.07	\$19.16	\$20.72	\$22.17	\$23.97	\$27.11	\$31.69

2023-2024 Proposed Auxiliary Pay Plan

Waco ISD

*Annual amounts are based on 8 hours per day.

Pay Grade	Current Grade	Job Title	Calendars	Minimum	Midpoint	Maximum	
301				Hourly	\$12.00	\$14.12	\$16.24
	301	Crosswalk Guard	178	178 Days	17,088	20,107	23,126
302				Hourly	\$14.00	\$16.87	\$19.74
	302	Cafeteria	180	180 Days	20,160	24,293	28,426
	302	Custodian	240	240 Days	26,880	32,390	37,901
303				Hourly	\$14.70	\$17.71	\$20.72
	303	Cafeteria - Lead	180	180 Days	21,168	25,502	29,837
	303	Custodian - Lead	240	240 Days	28,224	34,003	39,782
	303	Specialist - Floor Care	240				
	303	Utility Worker	240				
304				Hourly	\$15.45	\$18.61	\$21.77
	304	Cafeteria - Lead Trainee	184	184 Days	22,742	27,394	32,045
	304	CNS Warehouse - Worker	226	226 Days	27,934	33,647	39,360
	304	General Maintenance I	240	240 Days	29,664	35,731	41,798
	303	Groundskeeper	240				
	304	Utility Worker - Lead	240				
305				Hourly	\$16.55	\$19.94	\$23.33
	305	Cafeteria Manager - ES	184	184 Days	24,362	29,352	34,342
	305	Custodian - Head ES	240	207 Days	27,407	33,021	38,634
	305	General Maintenance II	240	240 Days	31,776	38,285	44,794
	305	Groundskeeper - Equipment Operator	240				
	305	Security Guard	207				
	305	Technician - Pest Control	240				
	305	Utility Worker - WISD Stadium	240				
	305	Warehouse - Worker	240				
306				Hourly	\$18.05	\$21.75	\$25.45
	306	Cafeteria Manager - MS	184	184 Days	26,570	32,016	37,462
	306	Custodian - Head MS	240	240 Days	34,656	41,760	48,864
	306	Groundskeeper - Irrigation	240				
	306	Groundskeeper - Lead	240				
	306	Warehouse Worker - Senior	240				
307				Hourly	\$19.68	\$23.71	\$27.74
	307	Cafeteria Manager - HS	184	184 Days	28,969	34,901	40,833
	307	Carpenter	240	240 Days	37,786	45,523	53,261
	307	Custodian - Head Administration	240				
	307	Custodian - Head DAEP	240				
	307	Custodian - Head HS	240				
	307	Energy Controls Technician II	240				
	307	Locksmith	240				
	307	Painter	240				
	307	Plumber (non licensed)	240				
	307	Roofer	240				
	307	Specialist - Warehouse Receiving	240				
	307	Welder	240				

2023-2024 Proposed Auxiliary Pay Plan

Waco ISD

*Annual amounts are based on 8 hours per day.

Pay Grade	Current Grade	Job Title	Calendars	Minimum	Midpoint	Maximum	
308				Hourly	\$21.85	\$26.33	\$30.81
	308	Electrician	240	240 Days	41,952	50,554	59,155
	308	Pest Control - Lead	240				
	308	Plumber	240				
	308	Technician - Asbestos	240				
	308	Technician - HVAC	240				
309				Hourly	\$23.61	\$28.44	\$33.27
	309	Preventive Maintenance - Lead	240	240 Days	45,331	54,605	63,878
310				Hourly	\$25.50	\$30.72	\$35.94
	310	Electrician - Lead	240	207 Days	42,228	50,872	59,517
	310	Manager - CNS Warehouse	226	226 Days	46,104	55,542	64,980
	310	Plumber - Lead	240	240 Days	48,960	58,982	69,005
	310	Police Officer	207, 226				
	309	Supervisor - CNS Compliance & Employee Relations	226				
	309	Supervisor - CNS Dev & Ops	226				
	310	Technician - HVAC Lead	240				
311				Hourly	\$29.32	\$35.33	\$41.34
	311	Asst Supervisor - Custodial	240	240 Days	56,294	67,834	79,373
	311	Foreman - Grounds	240				

2023-2024 Auxiliary Placement Scale

Waco ISD

Placement scales are used to establish a minimum rate for new hires based on experience approved by the district. Current employees may be paid above this placement scale. This scale is for placement of new hires only. Future wage increases are determined annually and are not guaranteed.

Range Position	2023-2024 Total Exp	Pay Grades										
		301	302	303	304	305	306	307	308	309	310	311
Minimum	0	\$12.00	\$14.00	\$14.70	\$15.45	\$16.55	\$18.05	\$19.68	\$21.85	\$23.61	\$25.50	\$29.32
	1	\$12.12	\$14.14	\$14.85	\$15.61	\$16.72	\$18.24	\$19.88	\$22.07	\$23.85	\$25.76	\$29.62
	2	\$12.22	\$14.28	\$15.00	\$15.76	\$16.88	\$18.42	\$20.08	\$22.29	\$24.09	\$26.02	\$29.92
	3	\$12.32	\$14.42	\$15.15	\$15.91	\$17.04	\$18.60	\$20.28	\$22.51	\$24.33	\$26.28	\$30.22
	4	\$12.42	\$14.56	\$15.30	\$16.06	\$17.20	\$18.78	\$20.48	\$22.73	\$24.57	\$26.54	\$30.52
	5	\$12.52	\$14.70	\$15.45	\$16.21	\$17.36	\$18.96	\$20.68	\$22.95	\$24.81	\$26.80	\$30.82
	6	\$12.62	\$14.84	\$15.60	\$16.36	\$17.52	\$19.14	\$20.88	\$23.17	\$25.05	\$27.06	\$31.12
	7	\$12.72	\$14.98	\$15.75	\$16.51	\$17.68	\$19.32	\$21.08	\$23.39	\$25.29	\$27.32	\$31.42
	8	\$12.82	\$15.12	\$15.90	\$16.66	\$17.84	\$19.50	\$21.28	\$23.61	\$25.53	\$27.58	\$31.72
	9	\$12.92	\$15.26	\$16.05	\$16.81	\$18.00	\$19.68	\$21.48	\$23.83	\$25.77	\$27.84	\$32.02
	10	\$13.02	\$15.40	\$16.20	\$16.96	\$18.16	\$19.86	\$21.68	\$24.05	\$26.01	\$28.10	\$32.32
	11	\$13.12	\$15.54	\$16.35	\$17.11	\$18.32	\$20.04	\$21.88	\$24.27	\$26.25	\$28.36	\$32.62
	12	\$13.22	\$15.68	\$16.50	\$17.26	\$18.48	\$20.22	\$22.08	\$24.49	\$26.49	\$28.62	\$32.92
	13	\$13.32	\$15.82	\$16.65	\$17.41	\$18.64	\$20.40	\$22.28	\$24.71	\$26.73	\$28.88	\$33.22
	14	\$13.42	\$15.96	\$16.80	\$17.56	\$18.80	\$20.58	\$22.48	\$24.93	\$26.97	\$29.14	\$33.52
	15	\$13.52	\$16.10	\$16.95	\$17.71	\$18.96	\$20.76	\$22.68	\$25.15	\$27.21	\$29.40	\$33.82
	16	\$13.62	\$16.24	\$17.10	\$17.86	\$19.12	\$20.94	\$22.88	\$25.37	\$27.45	\$29.66	\$34.12
	17	\$13.72	\$16.38	\$17.25	\$18.01	\$19.28	\$21.12	\$23.08	\$25.59	\$27.69	\$29.92	\$34.42
	18	\$13.82	\$16.52	\$17.40	\$18.16	\$19.44	\$21.30	\$23.28	\$25.81	\$27.93	\$30.18	\$34.72
	19	\$13.92	\$16.66	\$17.55	\$18.31	\$19.60	\$21.48	\$23.48	\$26.03	\$28.17	\$30.44	\$35.02
	Midpoint	20	\$14.12	\$16.87	\$17.71	\$18.61	\$19.94	\$21.75	\$23.71	\$26.33	\$28.44	\$30.72

DETAILED MARKET COMPARISONS

Waco ISD

Teacher Salary Plan Comparisons, 2022-2023

District		Student Enrollment		Number of Teachers		0-Year Salary	5-Year Salary	10-Year Salary	15-Year Salary	20-Year Salary	Average Teacher Salary	Max Yrs Credit	Last % Increase
1	Mansfield ISD	35,559	2,426			\$60,500	\$61,612	\$63,208	\$65,352	\$66,992	\$65,834	30	4.0%
2	Crowley ISD	16,541	1,217			\$60,010	\$61,187	\$63,048	\$64,152	\$66,365	\$62,454	30	4.0%
3	Grapevine-Colleyville ISD	13,790	988			\$57,000	\$58,700	\$61,300	\$62,900	\$64,400	\$62,403	37	2.0%
4	Duncanville ISD**	11,946	808			\$57,000	\$58,000	\$59,200	\$60,700	\$62,700		30	
5	Killeen ISD	43,938	2,759			\$56,160	\$58,160	\$60,160	\$62,160	\$64,160	\$61,106	20	8.0%
6	Midlothian ISD	10,922	685			\$56,000	\$58,000	\$60,000	\$62,000	\$64,000	\$61,214	30	4.0%
7	Del Valle ISD	11,078	748			\$54,000	\$55,636	\$58,675	\$60,367	\$62,684	\$58,395	26	7.0%
8	Leander ISD	42,265	3,129			\$53,520	\$54,896	\$57,182	\$59,617	\$61,862	\$58,540	30	5.0%
9	Belton ISD	13,636	950			\$53,500	\$55,000	\$57,100	\$59,600	\$62,100	\$57,100	30	4.0%
10	Pflugerville ISD	25,519	1,857			\$53,400	\$54,400	\$56,700	\$59,200	\$61,701	\$57,629	28	3.0%
11	Round Rock ISD	47,270	3,284			\$53,000	\$54,800	\$57,575	\$59,925	\$61,943	\$58,501	30	5.0%
12	Copperas Cove ISD	8,112	687			\$53,000	\$54,750	\$63,000	\$68,000	\$73,000	\$60,090	20	5.3%
13	Georgetown ISD	13,005	922			\$53,000	\$54,500	\$56,000	\$58,278	\$60,803	\$57,028	30	4.0%
14	Temple ISD	8,522	636			\$52,500	\$55,000	\$57,500	\$60,000	\$62,500	\$57,903	32	5.0%
15	Bryan ISD	16,180	1,292			\$50,000	\$51,250	\$53,000	\$55,950	\$59,250	\$55,110	37	1.9%
16	Tyler ISD	18,148	1,232			\$50,000	\$51,000	\$54,650	\$55,850	\$57,550	\$53,332	40	1.9%
17	Longview ISD	8,236	632			\$49,500	\$50,800	\$53,280	\$55,780	\$58,940	\$54,781	25	2.8%
18	College Station ISD	14,187	1,020			\$47,725	\$48,756	\$50,439	\$52,785	\$56,661	\$52,000	26	2.0%
19	La Vega ISD**	3,091	206			\$47,204	\$50,204	\$54,292	\$57,292	\$60,292		30	
20	Midway ISD-McLennan County	8,749	561			\$47,100	\$49,255	\$52,385	\$55,830	\$59,250	\$52,954	25	2.5%
Waco ISD		14,086	957			\$51,475	\$53,825	\$56,225	\$58,225	\$60,725	\$55,515	27	3.1%
25th Percentile						\$50,000	\$51,188	\$54,561	\$56,957	\$60,032	\$55,590	26	2.6%
Median						\$53,200	\$54,848	\$57,341	\$59,771	\$62,022	\$58,149	30	4.0%
75th Percentile						\$56,040	\$58,000	\$60,040	\$62,040	\$64,040	\$60,852	30	5.0%
Comparison to Median Dollar Difference						97%	98%	98%	97%	98%	95%		
						(\$1,725)	(\$1,023)	(\$1,116)	(\$1,546)	(\$1,297)	(\$2,634)		

** District did not participate in survey. Teacher schedules collected from the district.

Waco ISD

Teacher Stipend Comparisons, 2022-2023

District		Student Enrollment	Master's Degree - General		Master's Degree - Subject-Area	Secondary Math	Secondary Science	Special Education General/Resource	Special Education Self-Contained	Bilingual	ESL General	ESL Dual Language	National Board Certification	Campus Assignment
1	Belton ISD	13,636	\$1,000			\$2,000	\$2,000	\$2,500	\$2,500	\$6,000	\$500	\$500		
2	Bryan ISD	16,180	\$1,500					\$2,000	\$2,000	\$6,000		\$500		
3	College Station ISD	14,187	\$2,000					\$1,500	\$1,500	\$5,000				
4	Copperas Cove ISD	8,112	\$1,000			\$10,000	\$7,500	\$1,000	\$5,000	\$7,500	\$3,000			\$1,500
5	Crowley ISD	16,541	\$1,600			\$4,000	\$4,000		\$4,000	\$4,000				
6	Del Valle ISD	11,078	\$2,100			\$3,000	\$3,000	\$2,000	\$3,000	\$7,000		\$2,000		
7	Georgetown ISD	13,005	\$1,000						\$1,500	\$7,000				
8	Grapevine-Colleyville ISD	13,790	\$1,000							\$6,000				
9	Killeen ISD	43,938	\$1,175		\$3,315	\$3,120	\$3,120		\$5,000	\$7,500			\$1,175	
10	Leander ISD	42,265							\$2,000	\$7,000			\$1,500	
11	Longview ISD	8,236	\$1,000			\$4,000	\$4,000	\$1,700	\$1,700	\$4,000	\$1,000			
12	Mansfield ISD	35,559								\$5,500	\$1,575			
13	Midlothian ISD	10,922	\$1,000			\$5,000	\$5,000		\$1,500	\$5,000	\$500			
14	Midway ISD-McLennan County	8,749	\$1,000			\$2,500	\$2,000	\$1,500	\$2,000	\$2,000			\$2,000	
15	Pflugerville ISD	25,519	\$1,250			\$5,000	\$3,500	\$1,500	\$2,500	\$7,500		\$7,500		
16	Round Rock ISD	47,270	\$1,000						\$3,000	\$7,000			\$1,000	
17	Temple ISD	8,522	\$1,000			\$2,500	\$2,500		\$2,500	\$5,000	\$1,500			
18	Tyler ISD	18,148	\$1,000			\$2,000	\$2,000			\$3,000		\$3,000		
Waco ISD		14,086				\$8,000	\$8,000	\$1,500	\$3,000	\$6,000	\$1,000	\$1,000		
Median Stipend			\$1,000	\$3,315	\$3,120	\$3,120	\$3,120	\$1,600	\$2,500	\$6,000	\$1,250	\$2,500	\$1,338	\$1,500
Average Stipend			\$1,227	\$3,315	\$3,920	\$3,920	\$3,511	\$1,713	\$2,647	\$5,667	\$1,346	\$3,250	\$1,419	\$1,500
Count			16	1	11	11	11	8	15	18	6	4	4	1
Dollar Difference from Median					\$4,880	\$4,880	\$4,880	(\$100)	\$500	\$0	(\$250)	(\$1,500)		

Footnotes:

Special Education General/Resource:

- Del Valle ISD - resource/inclusion
- Longview ISD - All grades
- Midway ISD-McLennan County - Coteach, Resource, Pre-K
- Pflugerville ISD - SPED General

Special Education Self-Contained:

- College Station ISD - HR Services edit: copied from SpEd General
- Crowley ISD - SEAS, RISE, GOALS
- Del Valle ISD - life skills, behavior, ECSE
- Georgetown ISD - 2000 for Behavior Classes
- Killeen ISD, Leander ISD, Longview ISD - Life Skills, Pflugerville ISD - ECSE Self-Contained
- Midway ISD-McLennan County - ECSE, FAC, ADC, IBIS
- Round Rock ISD - \$2000 - Tier 1 ; \$2500 - Tier 2; \$3000 - Tier 3
- Temple ISD - PASS (Behavior Class)
- Waco ISD - 3000 for Achieve, Aspire and ECSE / \$4000 for SAIL (behavior unit)

Waco ISD

Teacher Incentive Comparisons, 2022-2023

District	Student Enrollment	Dept Chair/ Grade Leader	HS	Dept Chair/ Grade Leader	MS	Dept Chair/ Grade Leader	ES	Mentor Teacher	Foreign Language	Signing Bonus	Other Incentive
1 Belton ISD	13,636		\$2,000		\$700		\$700	\$500	\$2,000	\$1,000	\$2,000
2 Bryan ISD	16,180									\$1,500	
3 College Station ISD	14,187										
4 Copperas Cove ISD	8,112		\$1,500		\$1,500		\$1,500	\$500	\$3,000		
5 Crowley ISD	16,541		\$2,000		\$1,000		\$1,000		\$4,000		
6 Del Valle ISD	11,078		\$3,500		\$3,250		\$3,000	\$750		\$500	
7 Georgetown ISD	13,005		\$3,000		\$1,000		\$1,000	\$300			\$1,500
8 Grapevine-Colleyville ISD	13,790		\$2,000		\$1,500		\$775				
9 Killeen ISD	43,938		\$2,000		\$1,400			\$875		\$2,080	\$1,755
10 Leander ISD	42,265		\$2,000		\$1,000		\$250	\$500			
11 Longview ISD	8,236		\$3,000		\$3,000		\$3,000		\$4,000		\$1,500
12 Mansfield ISD	35,559		\$2,100		\$1,100		\$1,050				
13 Midlothian ISD	10,922		\$1,000		\$1,000		\$1,000	\$500			
14 Midway ISD-McLennan County	8,749		\$1,500		\$500		\$500	\$500	\$1,000		\$3,000
15 Pflugerville ISD	25,519		\$4,000		\$1,000		\$750	\$1,000	\$2,000		
16 Round Rock ISD	47,270		\$1,500		\$1,000		\$600	\$500		\$2,000	\$2,000
17 Temple ISD	8,522		\$2,000		\$1,000			\$500			
18 Tyler ISD	18,148		\$3,000		\$1,500		\$500				\$1,500
Waco ISD	14,086		\$1,000		\$1,000		\$1,000	\$500	\$3,000	\$1,500	
Median Stipend			\$2,000		\$1,000		\$763	\$500	\$2,500	\$1,500	\$1,755
Average Stipend			\$2,256		\$1,341		\$1,135	\$584	\$2,667	\$1,416	\$1,894
Count			16		16		12	11	6	5	7
Dollar Difference from Median			(\$1,000)		\$0		\$238	\$0	\$500	\$0	

Other Incentives:

Bryan ISD, Georgetown ISD, Longview ISD, Midway ISD-McLennan County, Round Rock ISD, Tyler ISD - doctorate degree

Killeen ISD - 1755 for Doctorate; 2210 for Dual Credit; 2335 Disciplinary Campus

Waco ISD
Market Comparisons, 2022-2023

Central Administration

	Benchmark Position	District Job Title	Diff in Days	Note	Districts Reporting	2022-2023 Market Salary	2022-2023 District Salary	2022-2023 District Salary Compared to Market	2022-2023 District Pay Range Midpoint	2022-2023 Pay Range Midpoint Compared to Market
1	Area Superintendent	Asst Superintendent - Student Services	0	S	26	\$146,049	\$136,019	93%	\$145,899	100%
2	Assistant Director - Athletics	Asst Director - Athletics	0	S	32	\$99,434	\$100,285	101%	\$96,380	97%
3	Chief Academic Officer	Asst Superintendent - C&I	0	S	48	\$146,723	\$138,019	94%	\$145,899	99%
4	Chief Facilities and Operations Officer	Chief Facilities & Operations Officer	0	S	45	\$141,281	\$159,377	113%	\$145,899	103%
5	Chief Financial Officer	Chief Financial Officer	0	S	57	\$163,222	\$155,334	95%	\$145,899	89%
6	Chief Human Resources Officer	Asst Superintendent - HR	0	S	53	\$145,314	\$139,377	96%	\$145,899	100%
7	Chief of Police	Chief of Police	0	S	25	\$100,000	\$88,360	88%	\$96,380	96%
8	Chief Technology Officer	Chief Technology Officer	0	S	48	\$130,008	\$137,234	106%	\$145,899	112%
9	Communications Officer	Exec Director/ Chief - Communications	0	S	53	\$111,171	\$111,673	100%	\$117,660	106%
10	Deputy Superintendent	Deputy Superintendent	0	S	34	\$174,659	\$167,534	96%	\$167,785	96%
11	Director of Athletics (Non-Coaching)	Director - Athletics	0	S	54	\$127,726	\$130,116	102%	\$117,660	92%
12	Director of Bilingual Education	Director - Bilingual/ ESL	0	S	43	\$103,643	\$103,643	100%	\$105,054	101%
13	Director of Career & Technical Education	Director - Career & Technology Education	0	S	53	\$105,734	\$123,467	117%	\$105,054	99%
14	Director of Curriculum/Instruction	Exec Director - Curriculum & Professional Development	0	S	44	\$112,305	\$119,116	106%	\$117,660	105%
15	Director of Finance/Business Manager	Exec Director - Finance	0	S	54	\$108,092	\$128,530	119%	\$117,660	109%
16	Director of Fine Arts	Director - Fine Arts	0	S	48	\$109,110	\$106,174	97%	\$105,054	96%
17	Director of Guidance & Counseling	Exec Director - Student Support	0	S	44	\$103,761	\$122,397	118%	\$117,660	113%
18	Director of Human Resources	Director - HR	0	S	46	\$108,782	\$105,054	97%	\$105,054	97%
19	Director of Maintenance	Director - Facilities & Maintenance	-4	S	54	\$104,683	\$99,750	95%	\$105,054	100%
20	Director of Nursing & Health Services	Director - Health Services	0	S,X	46	\$91,884	\$115,457	126%	\$105,054	114%
21	Director of Professional Development	Director - Professional Development TZ	0	S	24	\$101,616	\$106,520	105%	\$105,054	103%
22	Director of Purchasing	Director - Purchasing/ Warehouse/ Distribution Services	0	S	47	\$94,347	\$98,000	104%	\$96,380	102%
23	Director of Research, Evaluation, & Accountability	Director - Accountability & Data Analysis/Research	0	S	40	\$104,935	\$99,540	95%	\$96,380	92%
24	Director of Special Education	Exec Director - Special Education	0	S	58	\$116,080	\$121,116	104%	\$117,660	101%
25	Director of Student Services	Exec Director - Student Services	0	S	40	\$116,251	\$116,401	100%	\$117,660	101%
26	Federal Programs Administrator	Director - Intervention Services & State And Fed. Programs	0	S	46	\$105,066	\$106,152	101%	\$105,054	100%
District Comparison to Market							2022-2023 Pay		Plan	100%

Notes

- X Market comparison is excluded from overall counts and averages
- S Market salary is median of statewide responses for student enrollment of 10,000 to 24,999

Waco ISD
Market Comparisons, 2022-2023

Campus Administration

Benchmark Position		District Job Title		Diff in Days	Note	Districts Reporting	2022-2023 Market Salary	2022-2023 District Salary	2022-2023 District Salary Compared to Market	2022-2023 District Pay Range Midpoint	2022-2023 Pay Range Midpoint Compared to Market
1	Assistant Principal - ES	Asst Principal - ES		-2	M	18	\$71,063	\$70,599	99%	\$74,402	105%
2	Assistant Principal - HS	Asst Principal - HS		-8	M	18	\$81,455	\$81,638	100%	\$88,277	108%
3	Assistant Principal - MS	Asst Principal - MS		-5	M	18	\$75,026	\$74,394	99%	\$78,122	104%
4	Principal - DAEP/JAEP	Principal - Secondary DAEP		0	M	16	\$97,846	\$102,812	105%	\$105,054	107%
5	Principal - ES	Principal - ES		6	M	18	\$93,798	\$92,991	99%	\$96,380	103%
6	Principal - HS	Principal - HS		0	M	18	\$123,823	\$126,765	102%	\$117,660	95%
7	Principal - MS	Principal - MS		0	M	18	\$104,214	\$101,698	98%	\$105,054	101%
District Comparison to Market							2022-2023 Pay		100%	Plan	103%

Notes

104 M Market salary is median of reporting comparison districts

Waco ISD
Market Comparisons, 2022-2023

Professional

Benchmark Position		District Job Title	Diff in Days	Note	Districts Reporting	2022-2023 Market Salary	2022-2023 District Salary	2022-2023 District Salary Compared to Market	2022-2023 District Pay Range Midpoint	2022-2023 Pay Range Midpoint Compared to Market
1	Accountant (Degreed)	Accountant	0	C	11	\$68,134	\$73,453	108%	\$70,295	103%
2	Athletic Trainer	Athletic Trainer	-5	M	18	\$71,678	\$69,636	97%	\$67,228	94%
3	Behavior Specialist	Specialist - Behavior Intervention	10	M	17	\$65,882	\$59,884	91%	\$64,385	98%
4	Custodial Supervisor	Coordinator - Custodial & IPM	-14	M	14	\$66,275	\$69,735	105%	\$79,874	121%
5	Database Administrator	Analyst - Information Support System	0	C	11	\$85,616	\$71,240	83%	\$70,295	82%
6	Diagnostician	Diagnostician	5	M	17	\$70,685	\$71,859	102%	\$72,605	103%
7	District Child Nutrition Supervisor	Specialist - Child Nutrition Services	0	M	9	\$54,077	\$56,717	105%	\$65,088	120%
8	District Testing Coordinator	Coordinator - Testing & Assessments	0	M	13	\$88,723	\$92,350	104%	\$85,292	96%
9	Energy Manager	Manager - Energy	0	M	9	\$81,762	\$78,067	95%	\$70,295	86%
10	Head Football Coach	Athletic Sector Coordinator - Head Football Coach	0	M	16	\$112,921	\$105,232	93%	\$105,054	93%
11	High School Band Director	Band - Director HS	-13	M	17	\$82,963	\$81,006	98%	\$79,704	96%
12	Instructional Coach (Campus Level)	Instructional Specialist - various PG 103	-10	M	15	\$64,105	\$60,003	94%	\$67,228	105%
13	Instructional Coordinator	Coordinator - (various PG105)	0	M	15	\$82,051	\$83,026	101%	\$85,292	104%
14	Instructional Technology Specialist	Coordinator - IT	9	M	15	\$70,817	\$85,032	120%	\$85,292	120%
15	IT Coordinator/Manager	Coordinator - Technology Support Services	0	C	12	\$94,599	\$86,435	91%	\$85,292	90%
16	Librarian	Librarian - HS	-4	M	18	\$64,103	\$59,123	92%	\$63,400	99%
17	Licensed Specialist in School Psychology	LSSP	5	M	17	\$69,185	\$68,390	99%	\$72,605	105%
18	Maintenance Supervisor	Supervisor - Maintenance & Hazardous Materials	6	M	12	\$68,815	\$74,387	108%	\$74,650	108%
19	Network Administrator	Director - Network Systems	0	C	15	\$78,334	\$89,700	115%	\$96,380	123%
20	Nurse (RN)	Nurse - RN	0	C	17	\$61,850	\$61,425	99%	\$62,235	101%
21	Occupational Therapist	Occupational Therapist	3	C	16	\$68,409	\$69,588	102%	\$68,292	100%
22	Payroll Supervisor	Supervisor - Payroll	0	C	10	\$69,391	\$70,078	101%	\$75,215	108%
23	PEIMS Manager	Director - PEIMS/Attendance/Data Analytics	0	M	18	\$88,470	\$90,700	103%	\$96,380	109%
24	Police Lieutenant	Supervisor - Police/Administrative Services	0	C	4	\$89,984	\$77,100	86%	\$85,292	95%
25	ROTC Instructor	JROTC Instructor	-19	M	16	\$79,056	\$74,526	94%	\$63,704	81%
26	School Counselor - ES	Counselor - ES	-6	M	18	\$67,501	\$63,429	94%	\$63,234	94%
27	School Counselor - HS	Counselor - HS	-4	M	18	\$73,273	\$71,089	97%	\$72,964	100%
28	School Counselor - MS	Counselor - MS	-2	M	18	\$68,295	\$66,042	97%	\$67,560	99%
29	Social Worker	Social Worker	5	M	11	\$62,535	\$60,754	97%	\$67,228	108%
30	Speech-Language Pathologist	Speech Pathologist - ASHA	0	M	17	\$65,593	\$67,614	103%	\$67,213	102%
31	Speech-Language Pathology Assistant	Speech Pathologist - Asst	0	M	10	\$54,719	\$52,437	96%	\$58,164	106%
32	Systems Programmer/Analyst - Entry	Systems Engineer	-2	C	8	\$74,709	\$66,049	88%	\$70,295	94%

Waco ISD
Market Comparisons, 2022-2023

Professional

Benchmark Position		District Job Title	Diff in Days	Note	Districts Reporting	2022-2023 Market Salary	2022-2023 District Salary	2022-2023 District Salary Compared to Market	2022-2023 District Pay Range Midpoint	2022-2023 Pay Range Midpoint Compared to Market
33	Systems Programmer/Analyst - Senior	Senior Systems Engineer	0	C	10	\$91,983	\$81,161	88%	\$85,292	93%
34	Warehouse Supervisor	Supervisor - Warehouse	-20	M	14	\$63,138	\$68,006	108%	\$74,650	118%
District Comparison to Market						2022-2023 Pay		99%	Plan	102%

- Notes
- M Market salary is median of reporting comparison districts
 - C Market salary is average of non-school and school markets

Waco ISD

Market Comparisons, 2022-2023

Clerical & Technical

	Benchmark Position	District Job Title	Note	Districts Reporting	2022-2023 Market Rate	2022-2023 District Rate	2022-2023 District Rate Compared to Market	2022-2023 District Pay Range Midpoint	2022-2023 Pay Range Midpoint Compared to Market
1	Accounting Specialist	Specialist - Accounting Revenue	C	9	\$22.67	\$22.44	99%	\$23.74	105%
2	Accounts Payable Specialist	Specialist - Accounts Payable	C	15	\$22.48	\$21.65	96%	\$23.74	106%
3	Administrative Assistant - Campus	Clerk - Campus Office	M	12	\$16.83	\$16.68	99%	\$17.69	105%
4	Administrative Assistant - Director	Admin Asst - (various PG207)	M	18	\$22.94	\$21.88	95%	\$23.74	103%
5	Administrative Assistant - Executive/Chief	Ex Admin Asst - (various PG208)	M	18	\$27.06	\$26.60	98%	\$26.83	99%
6	Administrative Assistant to Principal - ES	Secretary - Principal ES	M	18	\$19.44	\$18.02	93%	\$18.57	96%
7	Administrative Assistant to Principal - HS	Secretary - Principal HS	M	18	\$22.96	\$20.21	88%	\$21.66	94%
8	Administrative Assistant to Principal - MS	Secretary - Principal MS	M	18	\$20.63	\$18.73	91%	\$20.24	98%
9	Attendance/PEIMS Data Assistant - ES	Specialist - PEIMS ES	M	15	\$17.56	\$17.20	98%	\$18.57	106%
10	Attendance/PEIMS Data Assistant - HS	Specialist - PEIMS HS	M	17	\$18.04	\$16.97	94%	\$18.57	103%
11	Attendance/PEIMS Data Assistant - MS	Specialist - PEIMS MS	M	14	\$18.19	\$17.31	95%	\$18.57	102%
12	Bookkeeper - HS	Bookkeeper - HS	M	15	\$20.84	\$19.06	91%	\$21.66	104%
13	Buyer	Buyer	NS		\$31.39	\$29.42	94%	\$31.39	100%
14	Computer Technician	Technician - Technology	C	17	\$24.69	\$22.18	90%	\$23.74	96%
15	District PEIMS Specialist	Specialist - PEIMS Interface	M	13	\$24.57	\$25.95	106%	\$26.83	109%
16	Employee Benefits Specialist	Specialist - HR Risk Mgmt, Benefits & Leave	C	14	\$25.40	\$22.24	88%	\$23.74	93%
17	Executive Assistant - Superintendent	Ex Asst to Superintendent	M	18	\$35.99	\$35.07	97%	\$31.39	87%
18	Help Desk Technician	Technician - Technology Help Desk	C	12	\$24.42	\$22.44	92%	\$23.74	97%
19	Human Resources Specialist	Specialist - HR Personnel Services	C	15	\$23.48	\$24.14	103%	\$23.74	101%
20	Network Technician	Technician - Network Services	C	11	\$32.57	\$27.34	84%	\$23.74	73%
21	Parent Liaison	Liaison - Parent Campus	M	10	\$17.84	\$17.72	99%	\$18.57	104%
22	Payroll Specialist	Specialist - Payroll	C	17	\$23.96	\$20.62	86%	\$23.74	99%

Waco ISD
Market Comparisons, 2022-2023

Clerical & Technical

Benchmark Position		District Job Title	Note	Districts Reporting	2022-2023 Market Rate	2022-2023 District Rate	2022-2023 District Rate Compared to Market	2022-2023 District Pay Range Midpoint	2022-2023 Pay Range Midpoint Compared to Market
23	Purchasing Specialist	Specialist - Purchasing II	C	13	\$22.68	\$22.87	101%	\$23.74	105%
24	Receptionist - Central Office	Receptionist - Admin	M	17	\$20.52	\$16.40	80%	\$17.69	86%
25	Registrar - HS	Registrar II - Para	M	17	\$22.01	\$18.97	86%	\$20.24	92%
26	Telecommunications Technician	Technician - Communication Systems	C,X	6	\$33.46	\$23.27	70%	\$26.83	80%
District Comparison to Market					2022-2023 Pay		94%	Plan	99%

Notes

- M** Market salary is median of reporting comparison districts
- C** Market salary is average of non-school and school markets
- NS** Market salary is median value of non-school market
- X** Market comparison is excluded from overall counts and averages

Waco ISD

Market Minimum Comparisons, 2022-2023

Market Minimum Comparisons, 2022-2023					Clerical & Technical Pay Range Minimums		
Benchmark Position		District Job Title	Note	Districts Reporting	2022-2023 Market Rate Minimum	2022-2023 District Rate Minimum	2022-2023 District Minimum Compared to Market
1	Accounting Specialist	Specialist - Accounting Revenue	M	8	\$22.77	\$19.47	86%
2	Accounts Payable Specialist	Specialist - Accounts Payable	M	15	\$20.19	\$19.47	96%
3	Administrative Assistant - Campus	Clerk - Campus Office	M	11	\$15.00	\$14.51	97%
4	Administrative Assistant - Director	Admin Asst - (various PG207)	M	15	\$19.92	\$19.47	98%
5	Administrative Assistant - Executive/Chief	Ex Admin Asst - (various PG208)	M	15	\$22.33	\$22.00	99%
6	Administrative Assistant to Principal - ES	Secretary - Principal ES	M	15	\$17.47	\$15.23	87%
7	Administrative Assistant to Principal - HS	Secretary - Principal HS	M	15	\$19.92	\$17.76	89%
8	Administrative Assistant to Principal - MS	Secretary - Principal MS	M	15	\$18.22	\$16.59	91%
9	Attendance/PEIMS Data Assistant - ES	Specialist - PEIMS ES	M	12	\$16.20	\$15.23	94%
10	Attendance/PEIMS Data Assistant - HS	Specialist - PEIMS HS	M	14	\$15.95	\$15.23	96%
11	Attendance/PEIMS Data Assistant - MS	Specialist - PEIMS MS	M	12	\$15.39	\$15.23	99%
12	Bookkeeper - HS	Bookkeeper - HS	M	13	\$18.50	\$17.76	96%
13	Computer Technician	Technician - Technology	M	14	\$21.92	\$19.47	89%
14	District PEIMS Specialist	Specialist - PEIMS Interface	M	11	\$24.16	\$22.00	91%
15	Employee Benefits Specialist	Specialist - HR Risk Mgmt, Benefits &	M	11	\$22.33	\$19.47	87%
16	Executive Assistant - Superintendent	Ex Asst to Superintendent	M	15	\$28.25	\$25.74	91%
17	Help Desk Technician	Technician - Technology Help Desk	M	10	\$23.06	\$19.47	84%
18	Human Resources Specialist	Specialist - HR Personnel Services	M	12	\$21.47	\$19.47	91%
19	Network Technician	Technician - Network Services	M	9	\$28.48	\$19.47	68%
20	Parent Liaison	Liaison - Parent Campus	M	9	\$17.47	\$15.23	87%
21	Payroll Specialist	Specialist - Payroll	M	15	\$21.91	\$19.47	89%
22	Purchasing Specialist	Specialist - Purchasing II	M	12	\$21.87	\$19.47	89%
23	Receptionist - Central Office	Receptionist - Admin	M	14	\$17.61	\$14.51	82%

Waco ISD

Market Minimum Comparisons, 2022-2023

		Benchmark Position	District Job Title	Note	Districts Reporting	Clerical & Technical Pay Range Minimums		
						2022-2023 Market Rate Minimum	2022-2023 District Rate Minimum	2022-2023 District Minimum Compared to Market
24	Registrar - HS		Registrar II - Para	M	14	\$17.60	\$16.59	94%
25	Telecommunications Technician		Technician - Communication System	M,X	4	\$32.16	\$22.00	68%
District Comparison to Market						Plan		
						90%		

Notes

- M Market minimum is median of reporting comparison districts
- X Market comparison is excluded from overall counts and averages

Waco ISD
Market Comparisons, 2022-2023

Instructional Support

Benchmark Position		District Job Title	Note	Districts Reporting	2022-2023 Market Rate	2022-2023 District Rate	2022-2023 District Rate Compared to Market	2022-2023 District Pay Range Midpoint	2022-2023 Pay Range Midpoint Compared to Market
1	Certified Nursing Assistant	Nurse - CNA	NS		\$15.08	\$15.76	105%	\$16.08	107%
2	Certified Occupational Therapy Assistant	Asst - OT	NS,X		\$28.82	\$38.03	132%	\$31.39	109%
3	Classroom Teacher Aide	Aide - (various PG202)	M	18	\$14.86	\$15.56	105%	\$16.08	108%
4	Deaf-Education Interpreter (Basic)	Interpreter - Sign Language Certified	C	7	\$25.67	\$26.16	102%	\$26.83	105%
5	Library Aide	Aide - Library	M	13	\$15.88	\$16.10	101%	\$16.08	101%
6	Licensed Vocational Nurse (LVN)	Nurse - LVN	C	15	\$22.83	\$24.46	107%	\$23.74	104%
7	Nursing Assistant (non-certified)	Aide - Nurse/ Medication	NS		\$14.62	\$17.62	121%	\$16.08	110%
8	Special Education Aide - General/Resource	Special Ed Aide - BASE/Achieve/Deaf/Res/Incl/Tran	M	18	\$15.39	\$16.42	107%	\$17.69	115%
9	Special Education Aide - Self-Contained	Special Ed Aide - Functional/PPCD/SAIL	M	16	\$15.47	\$16.05	104%	\$17.69	114%
District Comparison to Market					2022-2023 Pay		107%	Plan	108%

Notes

- M** Market salary is median of reporting comparison districts
- C** Market salary is average of non-school and school markets
- NS** Market salary is median value of non-school market
- X** Market comparison is excluded from overall counts and averages

Waco ISD

Market Minimum Comparisons, 2022-2023

					Instructional Support Pay Range Minimums		
Benchmark Position		District Job Title	Note	Districts Reporting	2022-2023 Market Rate Minimum	2022-2023 District Rate Minimum	2022-2023 District Minimum Compared to Market
1	Classroom Teacher Aide	Aide - (various PG202)	M	14	\$14.37	\$13.19	92%
2	Deaf-Education Interpreter (Basic)	Interpreter - Sign Language Certified	M	6	\$21.64	\$22.00	102%
3	Library Aide	Aide - Library	M	11	\$13.25	\$13.19	100%
4	Licensed Vocational Nurse (LVN)	Nurse - LVN	M	11	\$19.66	\$19.47	99%
5	Special Education Aide - General/Resource	Special Ed Aide - BASE/Achieve/Dea	M	15	\$14.49	\$14.51	100%
6	Special Education Aide - Self-Contained	Special Ed Aide - Functional/PPCD/S	M	14	\$14.50	\$14.51	100%
District Comparison to Market					Plan		
					99%		

Notes

M Market minimum is median of reporting comparison districts

Waco ISD
Market Comparisons, 2022-2023

Auxiliary

Benchmark Position	District Job Title	Note	Districts Reporting	2022-2023 Market Rate	2022-2023 District Rate	2022-2023 District Rate Compared to Market	2022-2023 Pay Range Midpoint	2022-2023 Pay Range Midpoint Compared to Market
1 Carpenter	Carpenter	C	13	\$23.14	\$23.35	101%	\$23.27	101%
2 Child Nutrition Manager - ES	Cafeteria Manager - ES	M	15	\$17.99	\$19.18	107%	\$19.58	109%
3 Child Nutrition Manager - HS	Cafeteria Manager - HS	M	15	\$22.37	\$23.52	105%	\$23.27	104%
4 Child Nutrition Worker	Cafeteria	C	15	\$13.55	\$14.00	103%	\$14.99	111%
5 Crossing Guard	Crosswalk Guard	M	11	\$13.58	\$12.59	93%	\$13.75	101%
6 Custodian	Custodian	C	15	\$14.59	\$13.85	95%	\$14.99	103%
7 District Child Nutrition Supervisor	Supervisor - CNS Compliance/EE Relations/Dev&Ops	M	9	\$29.91	\$26.05	87%	\$27.64	92%
8 Electrician	Electrician	C	16	\$26.99	\$27.52	102%	\$25.83	96%
9 General Laborer	Utility Worker	NS		\$15.03	\$14.87	99%	\$16.34	109%
10 General Maintenance Worker	General Maintenance II	M	17	\$20.14	\$17.34	86%	\$19.58	97%
11 Groundskeeper	Groundskeeper	M	18	\$16.67	\$15.92	96%	\$16.34	98%
12 HVAC Mechanic (Licensed)	Technician - HVAC	C	17	\$26.23	\$23.99	91%	\$25.83	98%
13 Lead Custodian - ES	Custodian - Head ES	M	14	\$17.03	\$18.31	108%	\$19.58	115%
14 Lead Custodian - HS	Custodian - Head HS	M,X	15	\$17.87	\$23.68	133%	\$23.27	130%
15 Locksmith	Locksmith	NS		\$21.94	\$21.77	99%	\$23.27	106%
16 Maintenance Foreman	Foreman - Grounds	C	11	\$29.43	\$28.76	98%	\$34.66	118%
17 Painter	Painter	C	13	\$21.28	\$21.19	100%	\$23.27	109%
18 Pest Control Specialist	Pest Control - Lead	C	9	\$20.43	\$26.20	128%	\$25.83	126%
19 Plumber	Plumber	C	13	\$26.90	\$24.58	91%	\$25.83	96%
20 Police Officer/Certified Peace Officer	Police Officer	C	7	\$29.64	\$27.83	94%	\$30.13	102%
21 Police Sergeant	Supervisor - Police/Field Service	C	5	\$40.28	\$40.61	101%	\$44.93	112%

Waco ISD
Market Comparisons, 2022-2023

Auxiliary

Benchmark Position		District Job Title		Note	Districts Reporting	2022-2023 Market Rate	2022-2023 District Rate	2022-2023 District Rate Compared to Market	2022-2023 District Pay Range Midpoint	2022-2023 Pay Range Midpoint Compared to Market
22	Security Guard	Security Guard		M	11	\$17.78	\$18.76	106%	\$19.58	110%
23	Warehouse Assistant	Warehouse - Worker		M	14	\$18.52	\$19.63	106%	\$19.58	106%
24	Warehouse Supervisor	Manager - CNS Warehouse		C	14	\$29.89	\$27.10	91%	\$30.13	101%
25	Welder	Welder		NS		\$23.27	\$24.31	104%	\$23.27	100%
District Comparison to Market						2022-2023 Pay		100%	Plan	105%

Notes

- M** Market salary is median of reporting comparison districts
- C** Market salary is average of non-school and school markets
- NS** Market salary is median value of non-school market
- X** Market comparison is excluded from overall counts and averages

Waco ISD

Market Minimum Comparisons, 2022-2023

		Benchmark Position	District Job Title	Note	Districts Reporting	Auxiliary Pay Range Minimums		
						2022-2023 Market Rate Minimum	2022-2023 District Rate Minimum	2022-2023 District Minimum Compared to Market
1	Carpenter		Carpenter	M	11	\$18.93	\$19.08	101%
2	Child Nutrition Manager - ES		Cafeteria Manager - ES	M	12	\$16.50	\$16.06	97%
3	Child Nutrition Manager - HS		Cafeteria Manager - HS	M	12	\$18.39	\$19.08	104%
4	Child Nutrition Worker		Cafeteria	M	12	\$13.52	\$12.29	91%
5	Crossing Guard		Crosswalk Guard	M	8	\$14.79	\$11.28	76%
6	Custodian		Custodian	M	13	\$13.60	\$12.29	90%
7	District Child Nutrition Supervisor		Supervisor - CNS Compliance/EE Rel	M	6	\$26.37	\$22.67	86%
8	Electrician		Electrician	M	13	\$22.20	\$21.18	95%
9	General Maintenance Worker		General Maintenance II	M	12	\$17.19	\$16.06	93%
10	Groundskeeper		Groundskeeper	M	15	\$14.82	\$13.40	90%
11	HVAC Mechanic (Licensed)		Technician - HVAC	M	13	\$23.01	\$21.18	92%
12	Lead Custodian - ES		Custodian - Head ES	M	13	\$14.51	\$16.06	111%
13	Lead Custodian - HS		Custodian - Head HS	M,X	13	\$16.30	\$19.08	117%
14	Maintenance Foreman		Foreman - Grounds	M	10	\$25.55	\$28.41	111%
15	Painter		Painter	M	10	\$17.23	\$19.08	111%
16	Pest Control Specialist		Pest Control - Lead	M	8	\$20.10	\$21.18	105%
17	Plumber		Plumber	M	11	\$22.46	\$21.18	94%
18	Police Officer/Certified Peace Officer		Police Officer	M	6	\$28.08	\$24.70	88%
19	Police Sergeant		Supervisor - Police/Field Service	M	3	\$34.52	\$37.43	108%

Waco ISD

Market Minimum Comparisons, 2022-2023

		Benchmark Position	District Job Title	Note	Districts Reporting	Auxiliary Pay Range Minimums		
						2022-2023 Market Rate Minimum	2022-2023 District Rate Minimum	2022-2023 District Minimum Compared to Market
20		Security Guard	Security Guard	M	10	\$15.75	\$16.06	102%
21		Warehouse Assistant	Warehouse - Worker	M	11	\$16.00	\$16.06	100%
22		Warehouse Supervisor	Manager - CNS Warehouse	M	11	\$24.92	\$24.70	99%
District Comparison to Market						Plan		
						97%		

Notes

- M Market minimum is median of reporting comparison districts
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Waco Independent School District

Board of Trustee Meeting Agenda Item

Date: June 29, 2023

Contact Person: Sheryl Davis

RE: Review and Discuss Budget Update

=====

Background Information:

The administration will present an update on the attendance, revenue, expenditures, and ending position projections as they related to the budget for the 2022-2023 fiscal year. We will also discuss recent legislation and its impact on school funding for 2023-2024, preliminary property valuations and projected tax rates, and finish up with a look at current general fund budget development and funding issues.

Fiscal Implications:

None.

Administrative Recommendation(s):

The report is presented for information, only.

BUDGET UPDATE

June 29, 2023



Agenda

- Enrollment and Average Daily Attendance
- 2022-2023 General Fund Projections
- School Finance Legislation
- 2023 Local Property Values and Projected Tax Rates
- 2023-2024 General Fund Base Budget, Additional Costs, and Projected Ending Position
- Budget Calendar

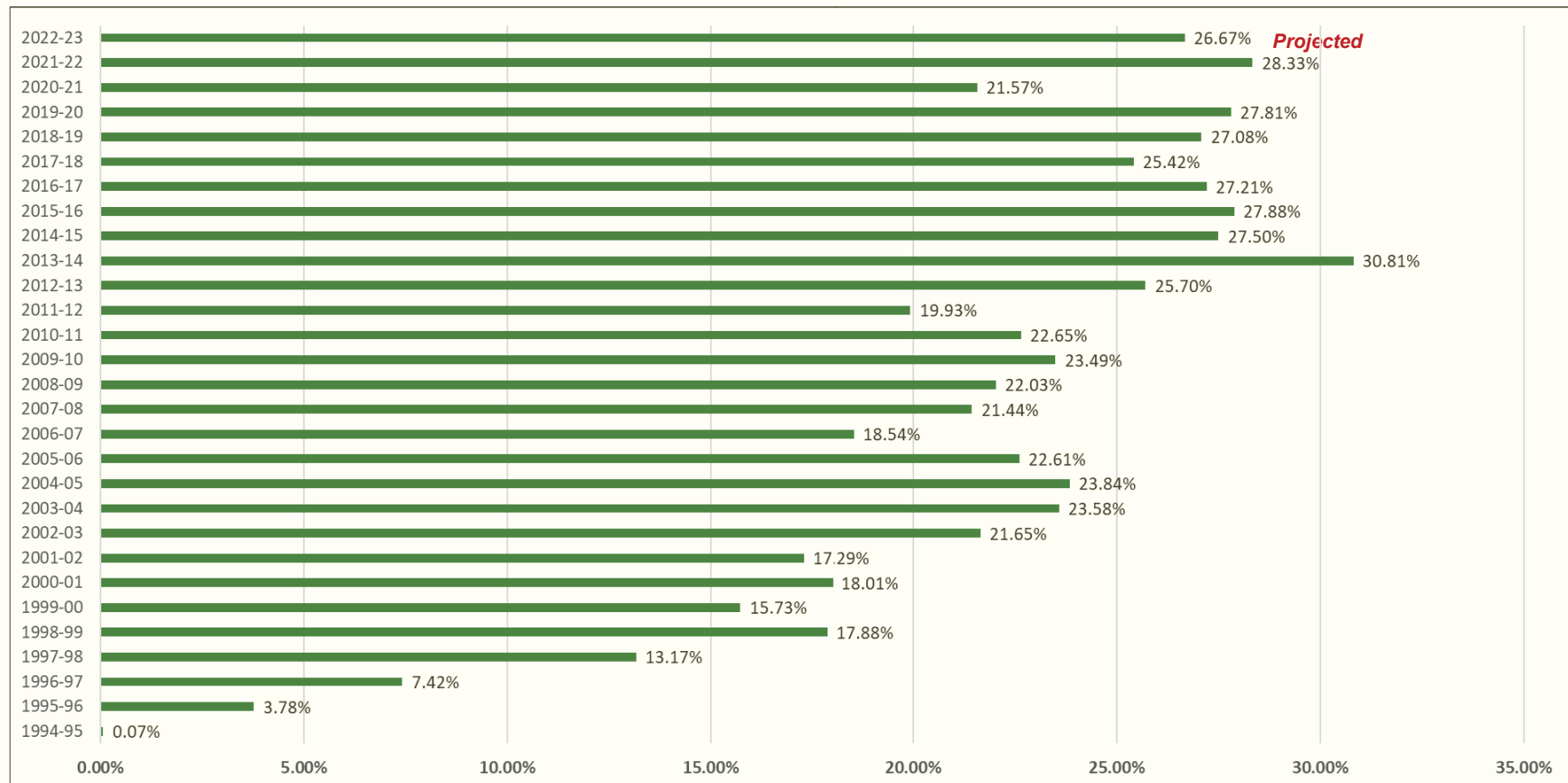
Enrollment & Average Daily Attendance

School Year	Fall PEIMS Enrollment	Total ADA per PEIMS Submission	Final ADA as a Percent of Fall PEIMS	TEA Summary of Finances ADA *with Hold Harmless	ADA Utilized for Budget Purposes	*State Hold Harmless Provisions
2014-2015	14,978	13,484	90.0%	13,484	13,453	
2015-2016	14,946	13,528	90.5%	13,528	13,452	
2016-2017	15,081	13,649	90.5%	13,649	13,455	
2017-2018	14,823	13,379	90.3%	13,379	13,669	
2018-2019	14,758	13,334	90.4%	13,334	13,301	
2019-2020	14,796	11,329	76.6%	13,354*	13,257	First 4 six weeks actual ADA with last two based on 2017-2018 ADA patterns
2020-2021	14,428	12,925	89.6%	13,188*	13,241	Received funding based on 2019-2020 ADA with 3-year trend of 100.4%, 13,537.681, difference came from ESSER funds
2021-2022	14,086	11,756	84.6%	12,503*	13,261	First 4 six weeks based on target percentage attendance rate from 2019-2020, 5 th & 6 th actual
2022-2023	13,823	11,871	85.9%	11,871	12,461	
2023-2024	13,698	11,816	86.3%	11,816	11,816	

2022-2023 General Fund Projections

Total Fund Balance – Beginning		\$ 55,253,929
Revenues:		
Local and Intermediate Source	\$ 82,607,565	
State Program	61,589,796	
Federal Program	5,857,421	150,054,782
Expenditures*		(152,712,671)
Expenditures over Revenues		(2,657,889)
Other Resources & (Uses)		(426,217)
Expenditures & Uses over Revenue & Resources		(3,084,106)
Total Fund Balance – Ending		\$ 52,169,823
<i>*Includes \$485,523 in construction costs to complete walk-in cooler/freezer project & \$1,007,131 in HVAC work left from hail damage claim</i>		

History of Unassigned Fund Balance as a Percent of Budget



Legislation – What’s Real

Legislation	Financial Impact
Current Law – Component of HB3:	
Golden Penny Yield increases from \$98.56 to \$126.21 in 2024 and \$129.52 in 2025, early estimates dependent on statewide property values, could change with any new school funding law	Increase in Tier II funding of \$4.0 million in 2024 and an additional \$0.5 million in 2025
School Safety:	
School Safety Allotment increase from \$9.72 per ADA to \$10.00 per ADA. Additionally, districts will receive \$15,000 per campus (question as to whether that will include the Greater Advanced Academies since they do not generate ADA, that is reporting by enrolled campus). Funds must be used in securing facilities, emergency response and mental health training, mandates at least one, armed security officer present during regular school hours at each district campus, technologies may only be purchased from a TEA approved vendor	The increase in the per capita rate will generate \$2,777 while the \$15,000 per campus will potentially generate \$375,000
Instructional Materials Allotment:	
Additional \$40 per student enrollment, may be used only for procurement of state-approved instruction materials	Possible \$547,920 increase, unused balance rolls forward

Legislation – What’s Real

Legislation	Financial Impact
New Instructional Facilities Allotment (NIFA):	
Statewide appropriation increased from \$70 million per year to \$100 million per year. Funds are allotted to assist districts pay for the cost of equipping and furnishing newly constructed instructional facilities, repurposed instructional facilities, or a leased facility operating for the first time as an instructional facility. The allotment is \$1,000 per ADA for the first year of occupancy plus an additional \$1,000 per increase in ADA for the second year of occupancy.	We have submitted an application for G.W. Carver for an estimated ADA of 808, should generate \$808,000 in 2023-2024.
Other Funding Legislation:	
• Up to \$20 per enrollment for open education resources materials • \$1500 per activity in which a non-enrolled student participated in district UIL • \$588.5 million to TRS for TRS ActiveCare • One-time payments to most categories of TRS retirees & COLA for those who retired prior to 2020	

Legislation – What’s Up in the Air

Legislation	Financial Impact
Tax Rate Relief:	
- Funds are appropriated within the budget for property tax relief - House and Senate have been unable to agree on methodology: - House: appraisal cap and shave \$0.1620 off districts' maximum compressed tax rate - Senate: increase Homestead Exemption to \$100,000 and shave \$0.1000 off districts' maximum compressed tax rate	
Increase in the Basic Allotment:	
- State funding has been largely flat for four years - Adjusting the basic allotment for inflation since 2019 (14.5%) would mean a \$900 increase (that would generate \$16 million for Waco ISD) - Clear that any increase for school districts is dependent on a voucher program passing	

2023 Net Taxable Property Values

Tax Year	Net Taxable Values		Value Adjustment	Percent Change from:	
	Preliminary	Certified		Preliminary	Prior Year
2015	\$ 5,033,516,985	\$ 4,764,656,776	\$ (268,860,206)	-5.34%	+ 4.29%
2016	5,337,750,193	5,251,460,667	(86,286,526)	-1.62%	+10.22%
2017	5,952,976,568	5,744,499,011	(208,477,557)	-3.50%	+9.39%
2018	6,530,822,722	6,341,596,283	(189,226,439)	-2.90%	+10.39%
2019	7,014,667,561	6,827,446,082	(187,221,479)	-3.21%	+7.66%
2020	7,587,072,447	7,247,140,447	(339,932,000)	-4.48%	+6.74%
2021	7,421,037,502	7,557,152,053	136,114,551	+1.83%	+4.28%
2022	9,773,735,622	8,838,221,086	(935,514,536)	-9.57%	+16.95%
2023	10,896,575,510	9,937,676,865*	(958,898,645)	-8.80%	+12.44%

* Based on Chief Appraiser's estimate of historical decrease of 8.8%

2023 Property Values

- School FIRST requires a discussion of property values with School Board within 120 days of adopting the budget
- Current year State-certified property values are used in the formulas to calculate State Foundation School Program revenue
- District must now estimate those State values
- Differences in values are primarily related to local exemptions and deductions such as the Freeport exemption, leased vehicles, pollution control, and solar energy deductions
- Estimated 2023 “T-2” value for State funding purposes is: **\$9,724,123,827**



Tax Rate

Preliminary

- The Maintenance & Operations tax rate is subject to compression each year based estimated statewide property value growth compared to local property value growth
- By law, the tax year 2023 limitation on the Maximum Compressed Tax (MCR) Rate is set at \$0.7155 down from \$0.8046 in 2022
- The Voter Approval (or rollback) Tax Rate includes any previously voter approved pennies for Tier 2 Funding, Level 1 (Golden Pennies) and Level 2 (Copper Pennies – as previously compressed under HB 3)

Computation of Tax Rate	
2022 Comptroller Certified Taxable Value	\$ 8,682,254,417
2022 Chief Appraiser's Certified Values	\$ 8,838,221,086
2023 Chief Appraiser's Estimated Certified Values	\$ 9,937,676,865
Central Appraisal District (CAD) Value Growth	12.44%
2023 Comptroller Estimated Certified School District Value	\$ 9,762,307,152
Prior Year Maximum Compressed Tax Rate (MCR)	\$ 0.8046
Local Preliminary MCR	\$ 0.7334
2023 State Compression Percentage	7.95%
2023 Limitation on MCR	\$ 0.715500
MCR (lesser of state or local limited under law)	\$ 0.733400
Add: Voter Approved Golden Pennies	\$ 0.080000
Add: Voter Approved Copper Pennies (compressed)	\$ 0.058300
2023 Total M&O Tax Rate	\$ 0.871700
2023 I&S Tax Rate (required to pay debt service)	\$ 0.271738
2023 Voter Approved Tax Rate	\$ 1.143438

Year-to-Year Comparison of Tax Rates

Preliminary

Tax	2022	2023*	Increase/ (Decrease)
Maintenance & Operations (General Fund)	\$ 0.942900	\$ 0.871700	\$ (0.071200)
Interest & Sinking (Debt Service Fund)	\$ 0.298969	\$ 0.271738	\$ (0.027231)
Total Tax Rate	\$ 1.241869	\$ 1.143438	\$ (0.098431)

** Projected rates based on preliminary property values and Chief Appraiser's projection of certifies values*

The I&S tax rate, as promoted during the bond election, was estimated to be \$0.337507 for 2023-2024 so this is about a **\$0.065** decrease. The increased property values have effectively decreased the tax rate needed for debt service.

2023-2024 General Fund Preliminary Estimates

Revenues			
Revenue Source	2022-2023	2023-2024	Increase
Local Property Taxes	\$ 79,124,239	\$ 82,900,109	\$ 3,775,870
State Foundation School Program	52,824,062	54,702,423	1,878,361
Total Property Tax & State FSP	\$ 131,948,301	\$ 137,602,532	\$ 5,654,231

Expenditures	
Starting out with a deficit in 2022-2023	\$ 3,084,106
Increase in special education maintenance of effort	850,000
Increase to meet mandate of safety allotment	270,000
Utility increases (includes assessment to fix grid)	500,000
TRS rate increase	343,000
Substitute costs	250,000
Other unavoidable rate increase	340,000
Total deficit and known expenditure increases	\$ 5,637,106

There are currently \$7.1 million in salaries and benefits budgeted in federal stimulus (ESSER) funds for 2023-2024. This funding will end September 30, 2024 so any positions that the District wants to retain will need to be picked up in the general fund unless other funding sources are found.

Cost of Salary Increase to the General Fund

Employee Group	1.0%	2.0%	3.0%
Teachers	\$ 598,911	\$ 1,148,730	\$ 1,683,094
Administrative / Professional	497,170	815,151	1,140,828
Clerical / Paraprofessional	314,426	418,662	534,820
Auxiliary	458,143	494,932	537,354
Total Cost Estimate	\$ 1,868,650	\$ 2,877,475	\$3,896,096
Cost Attributable to Other Funds	(340,813)	(524,807)	(710,588)
Estimated Cost to General Fund	\$ 1,527,837	\$ 2,352,668	\$ 3,185,508

Important Budget Dates

Activity	Date
Chief Appraiser certifies 2023 property values	7/25/2023
Meeting to present the proposed budget for the following fiscal year (date by which the Superintendent shall cause to be prepared a proposed budget for the following fiscal year is 8/20/23)	8/10/2023
Notice of Budget and Tax Rate Meeting – must be 10 – 30 days before the date of the Public Hearing	8/11/2023
Budget and Tax Rate Meeting	8/24/2023
Meeting to Adopt the Budget and Tax Rate (budget must be adopted before the adoption of the tax rate for the ta year in which the fiscal year covered by the budget begins)	8/24/2023
First day of 2022-2023 fiscal year	9/1/2023

BUDGET UPDATE

June 29, 2023



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Enrollment & Average Daily Attendance

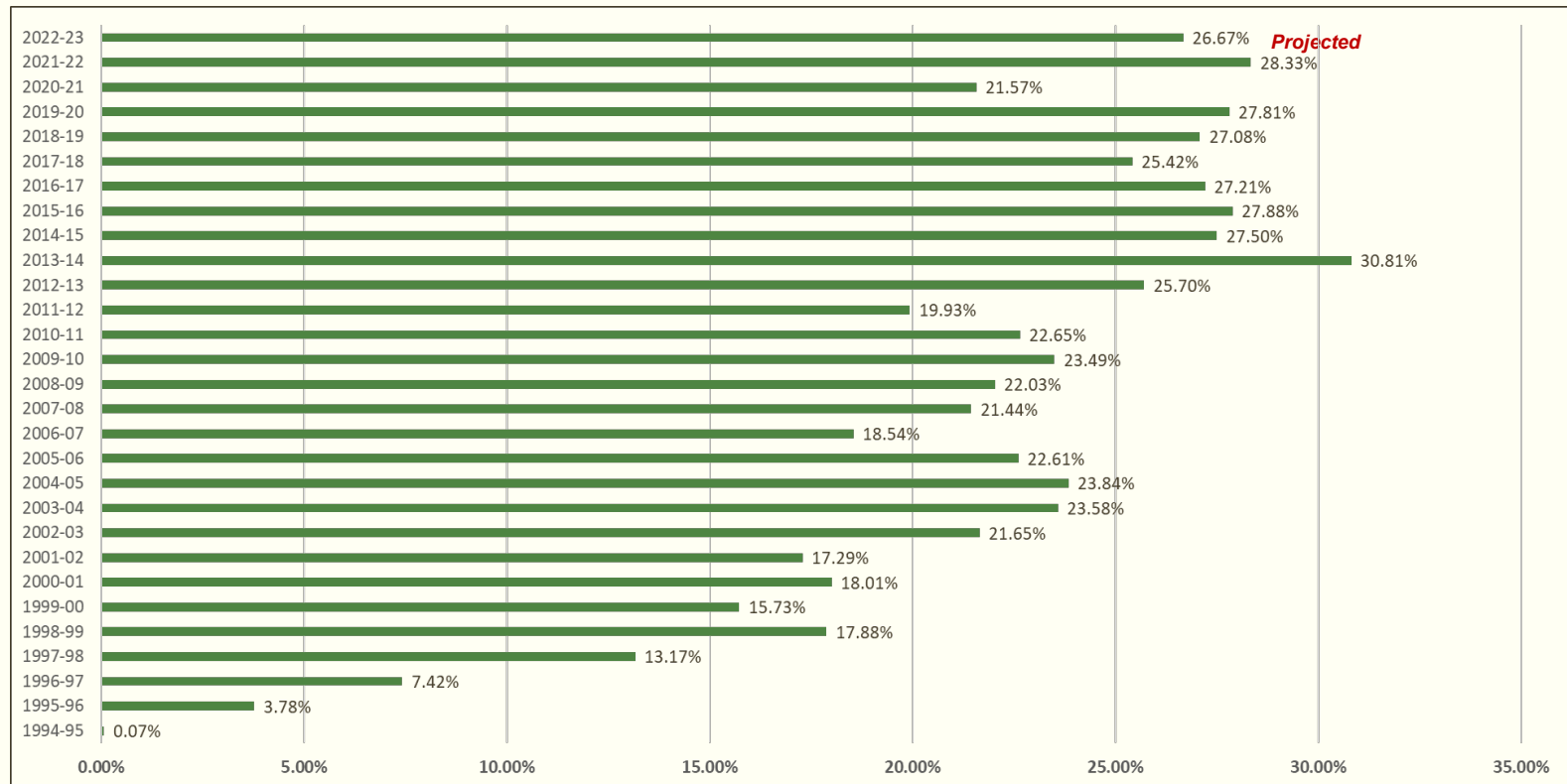
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Year-to-Year Comparison of Tax Rates

Preliminary

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Interest & Sinking (Debt Service Fund)	\$ 0.298969	\$ 0.271738	\$ (0.027231)
Total Tax Rate	\$ 1.241869	\$ 1.143438	\$ (0.098431)

** Projected rates based on preliminary property values and Chief Appraiser's projection of certifies values*

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Administrative / Professional	497,170	815,151	1,140,828
Clerical / Paraprofessional	314,426	418,662	534,820
Auxiliary	458,143	494,932	537,354
Total Cost Estimate	\$ 1,868,650	\$ 2,877,475	\$3,896,096
Cost Attributable to Other Funds	(340,813)	(524,807)	(710,588)
Estimated Cost to General Fund	\$ 1,527,837	\$ 2,352,668	\$ 3,185,508

Important Budget Dates

Activity	Date
Chief Appraiser certifies 2023 property values	7/25/2023
Meeting to present the proposed budget for the following fiscal year (date by which the Superintendent shall cause to be prepared a proposed budget for the following fiscal year is 8/20/23)	8/10/2023
Notice of Budget and Tax Rate Meeting – must be 10 – 30 days before the date of the Public Hearing	8/11/2023
Budget and Tax Rate Meeting	8/24/2023
Meeting to Adopt the Budget and Tax Rate (budget must be adopted before the adoption of the tax rate for the ta year in which the fiscal year covered by the budget begins)	8/24/2023
First day of 2022-2023 fiscal year	9/1/2023

Waco Independent School District

Board of Trustees Meeting Agenda Item

Date: June 29, 2023

Contact Person: Dr. Susan Kincannon

RE: Consider, Discuss and Take Appropriate Action Regarding Indian Spring Middle School and G.W. Carver Middle School Consolidation, Closure and Renaming

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Background Information:

The new G.W. Carver Middle School will open August 2023. With the opening of the new school, the student populations of G.W. Carver Middle and Indian Spring Middle schools will be consolidated under one campus identification code.

As a part of the process for closing a campus, the Administration submitted a request to the Texas Education Agency (TEA) on January 18, 2023, for the closure of the Indian Spring Middle School campus code 161914050. Dr. Robin McDurham, Patrick Uptmore and Sheryl Davis met with TEA representatives on April 14, 2023, to discuss the rationale for the request for consolidation of the two campuses. They were informed that an agency committee would review and make a decision.

On May 3, 2023, TEA's Office of Governance and Accountability formally advised the District that they would not approve the closure of the Indian Spring campus code because Indian Spring Middle School has an accountability history of "Overall F" and is labeled as "Comprehensive Support and Improvement," a rating that is lower than G.W. Carver Middle School. TEA's recommendation is that the District close the campus code, 161914048, currently identified as G.W. Carver, and rename Indian Spring Middle School, currently identified as campus code 161914050, G.W. Carver Middle. This change will ensure the campus remains in School Improvement interventions.

Fiscal Implications:

None.

Administration Recommendations:

The Administration recommends that the Board of Trustees approves the closing of the G.W. Carver Middle School, currently identified as campus code 161914048, and rename Indian Spring Middle School, currently identified as campus code 161914050, G.W. Carver Middle School.

Waco Independent School District

Board of Trustee Meeting Agenda Item

Date: June 30, 2023

Contact Person: Gloria Barrera

RE: Consider, Discuss and Take Appropriate Action on the Schematic Design of South Waco Elementary School and Receive an Update on the Design Development of Kendrick Elementary

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Background Information:

At the May Regular meeting, architects presented an update on South Waco. Since that meeting, the design team and contractors have been refining designs for both South Waco and Kendrick to reduce costs. This effort has included meetings with the Project Executive Committee and the City of Waco.

Representatives from O'Connell Robertson will present the schematic design for South Waco and provide an update on Kendrick. The Administration requests approval of the schematic design for South Waco Elementary at this time. The architect, CMAR, and district will continue working to reduce costs on both projects as they work on design development. An overview of project costs will be presented with design development at a future meeting.

Fiscal Implications

The project budgets for Kendrick and South Waco are as follow:

Description:	South Waco ES	Kendrick ES
Construction Costs	21,013,144	29,904,151
Fees / PM / Expenses	1,681,051	2,392,332
Other Developmental Costs (Survey / Geotech / Etc.)	105,066	149,521
Furnishings Fixtures and Equipment	-	869,939
IT Systems (Projectors, Network, Security, Phone)	-	869,939
Building Move-In Expenses	52,533	74,760
Construction Testing	52,533	74,760
Project Contingency	798,499	1,136,358
Total Project Budget:	23,702,826	35,471,760

Administrative Recommendation(s):

Review and approve the Schematic Designs for South Waco Elementary School as presented.



Kendrick and South Waco Elementary Schools Design Update

S. Waco ES Schematic Design
Kendrick ES Design Update

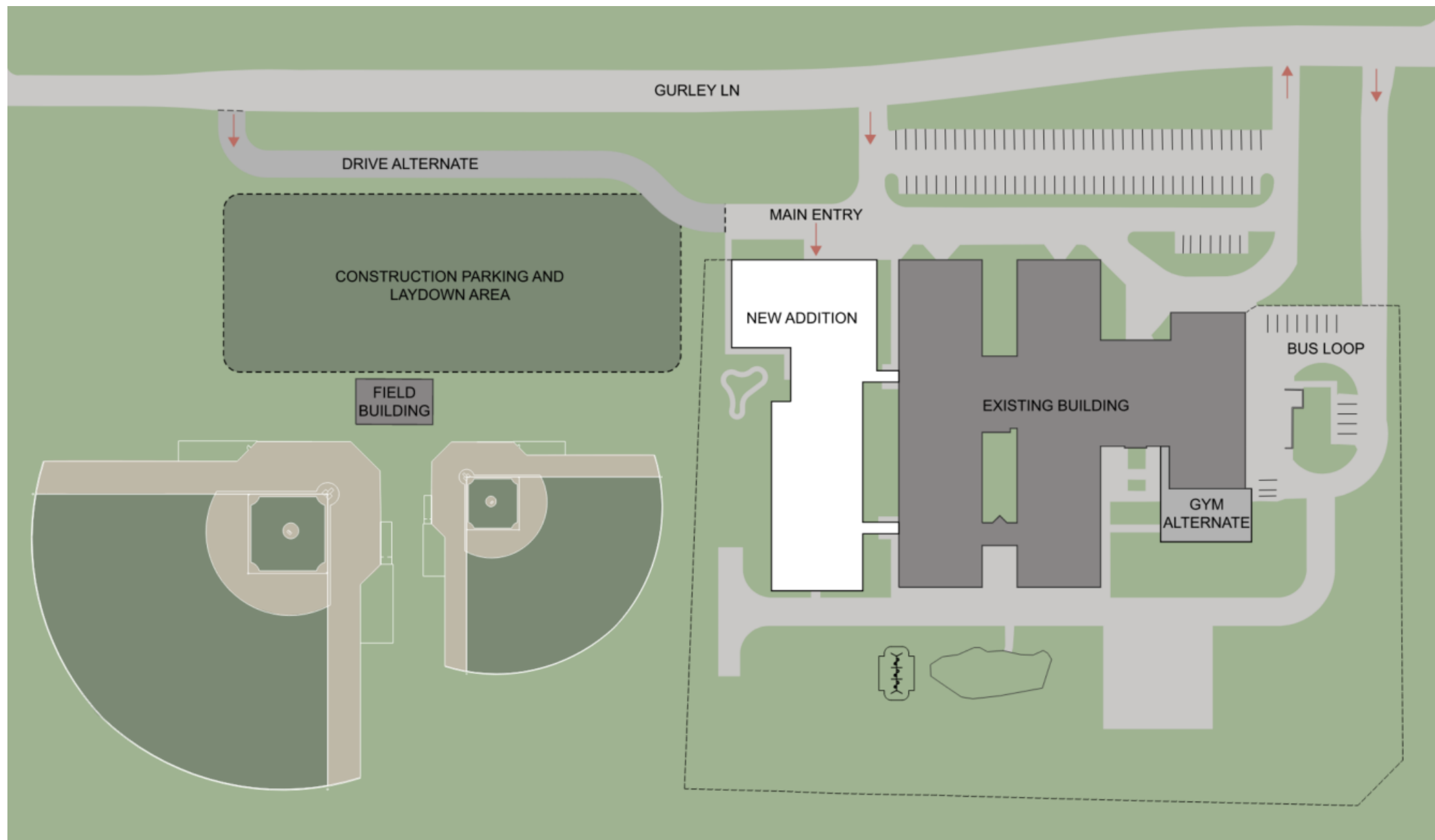
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- South Waco ES Schematic Design
- Southern Little League Update
- Kendrick ES Update
- Project Schedule Overview + Questions



Plan Development – South Waco

752



753



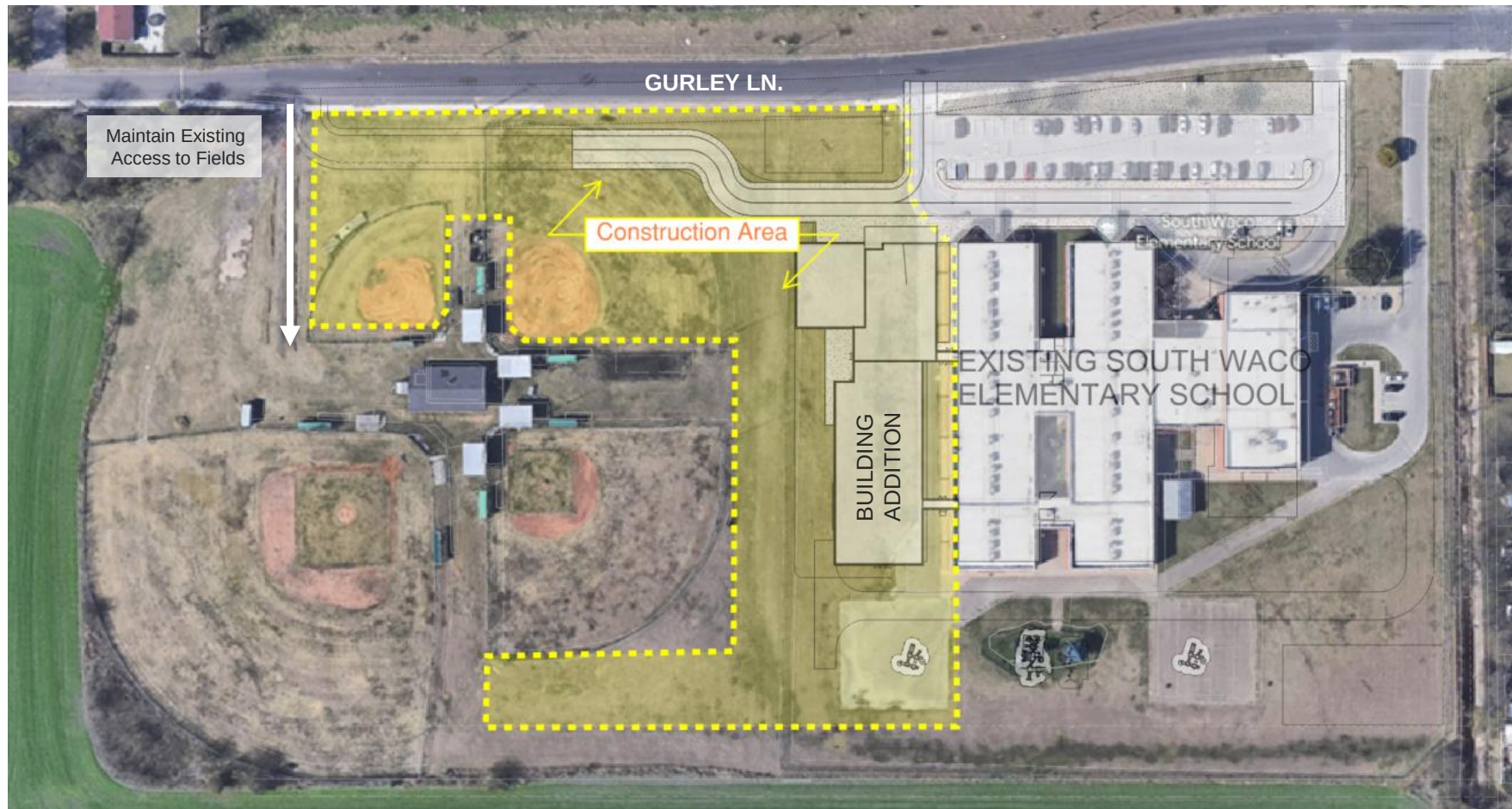
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Southern Little League Update

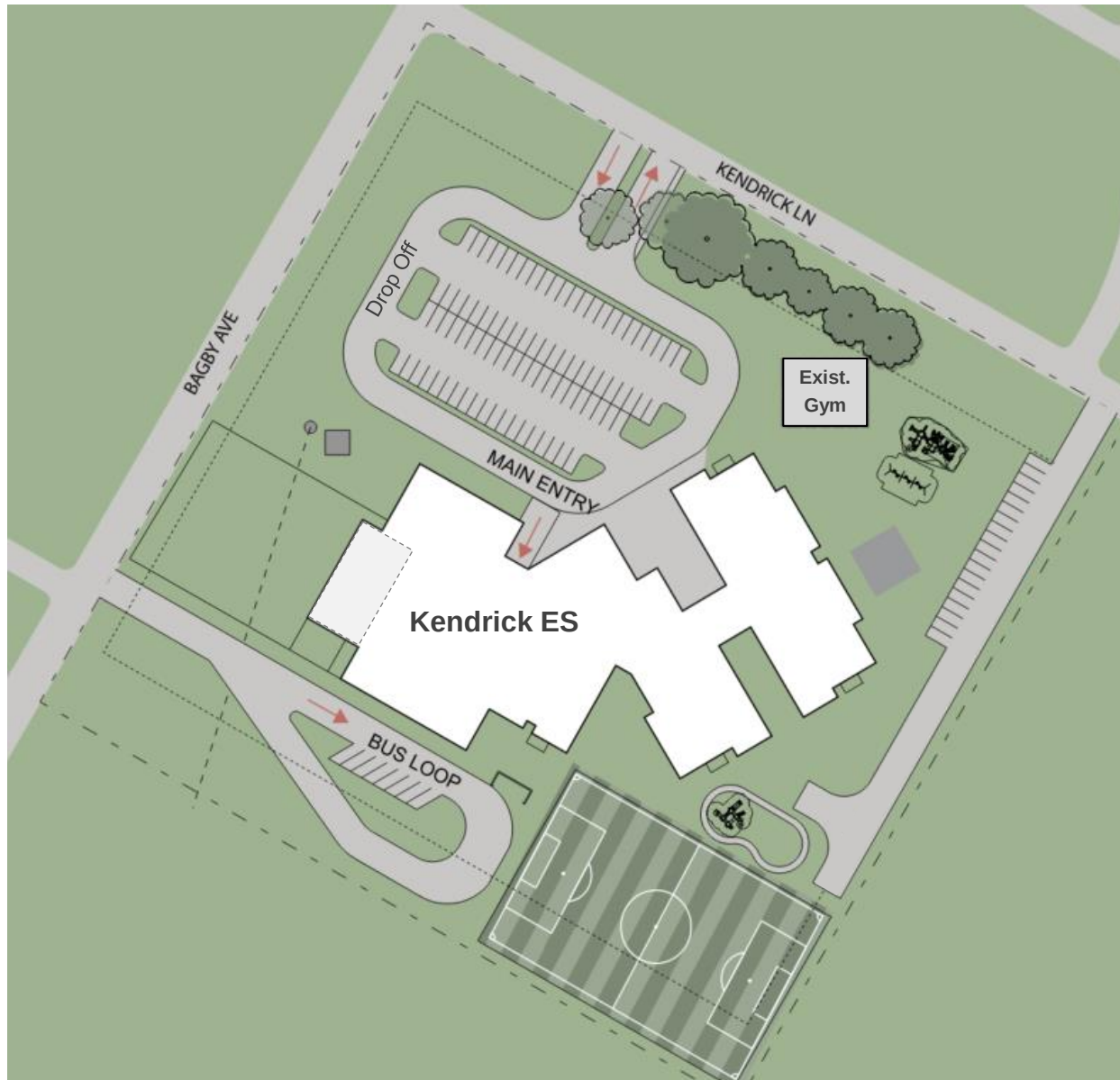
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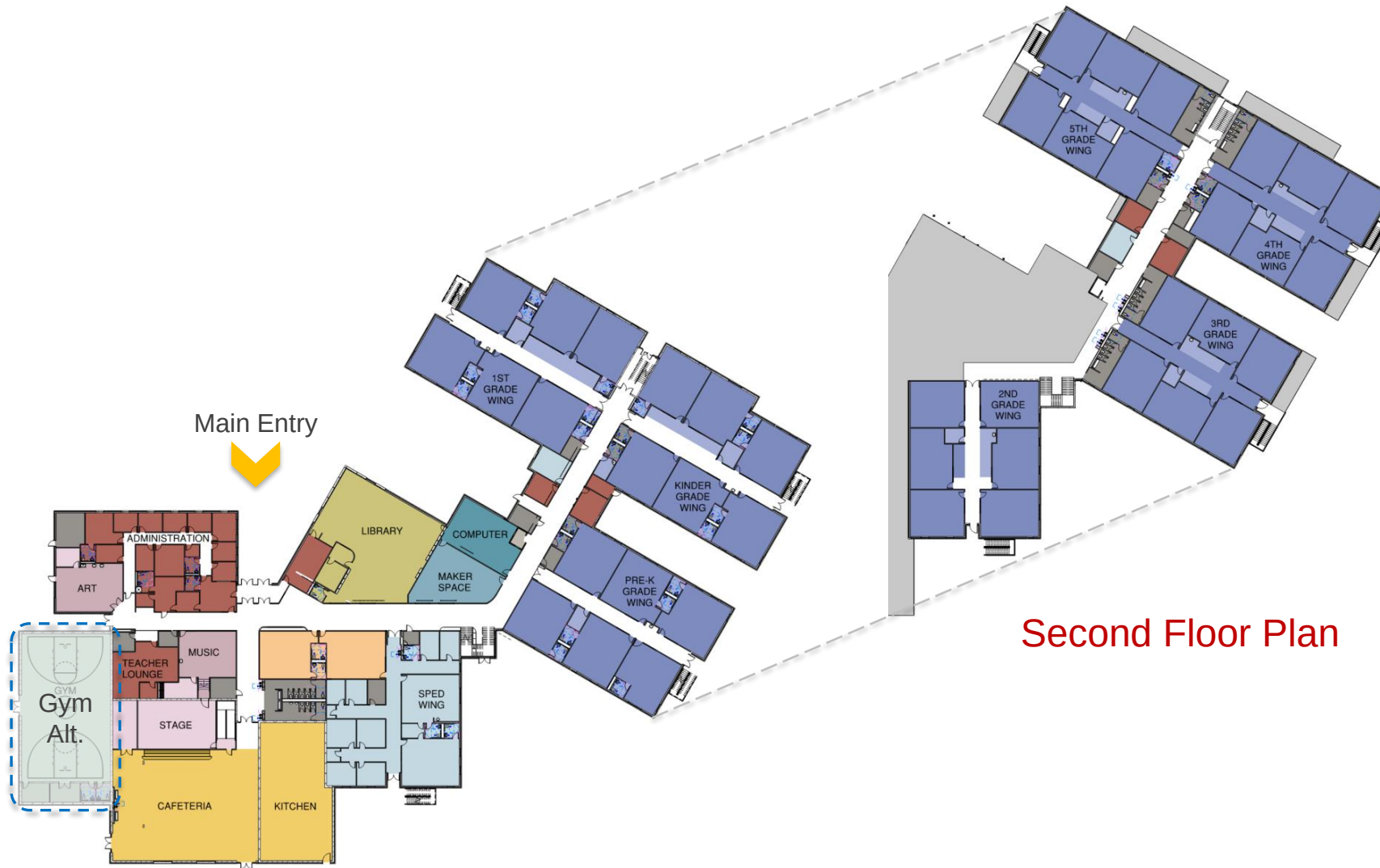
- June Meeting Update
- Planned to be completed by start of **2025** season.
- Waco ISD Athletics partnership to allow shared-use of UHS and Athletic Complex facilities as needed for larger games/tournaments or overlapping schedules.

Plan Development – Kendrick ES

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- Parent and bus drop off separation to minimize traffic congestion
- Expanded queuing for parent pick up / drop off
- Maintain existing oak trees along Kendrick Ln.
- All visitor access and parking at main entry
- Opportunity to utilize some existing electrical utility infrastructure to save cost



First Floor Plan

Second Floor Plan

Kendrick ES

Schematic Design	April 2023
Design Development	July 2023
Design Complete	Oct. 2023
Notice to Proceed	Dec. 2023
Move to Indian Spring	Winter Break 2023 - 2024
Demolish Existing Building	Jan 2024
Construction	Jan 2024 - May 2025
Move to New Building	Summer 2025

South Waco ES

Schematic Design	April 2023
Design Development	July 2023
Design Complete	Oct. 2023
Notice to Proceed	Dec. 2023
Construction for Additions	Jan 2024 – Jan 2025
Renovations	Summer 2024 (2025 TBD)

Waco Independent School District

Board of Trustee Meeting Agenda Item

Date: June 29, 2023

Contact Person: Jerry Allen

RE: Review and Discuss Technology Services Update

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Background Information

The attached presentation represents an update of advancements to district wide technology by the Waco ISD Technology Services Department since 2020.

Fiscal Implications

N/A

Administrative Recommendation(s):

Report Only.

Technology Services Update



Technology Services

Technology Services 2020 Survey



Student Survey

Would you prefer to bring your own computer or receive a district issued laptop?

[More Details](#)



What type of device do you prefer to complete your coursework?

[More Details](#)



Faculty Survey

Would you rather have one to one or teacher carts of student devices?

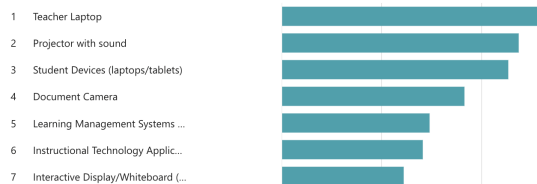
[More Details](#)

[Insights](#)



General use of technology - Minimal Technology Standard

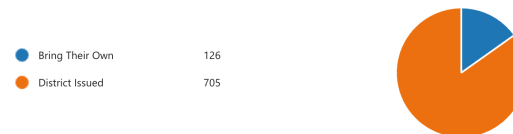
[More Details](#)



Parent Survey

Would you prefer your student(s) to bring their own computer or receive a district issued laptop/device?

[More Details](#)



Do you feel like the technology issued to your child(ren) would be utilized to enhance the education received by Waco ISD?

[More Details](#)

[Insights](#)



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Key takeaways from survey:

Establishing a vision and purpose - Developing a Minimum Technology Standard

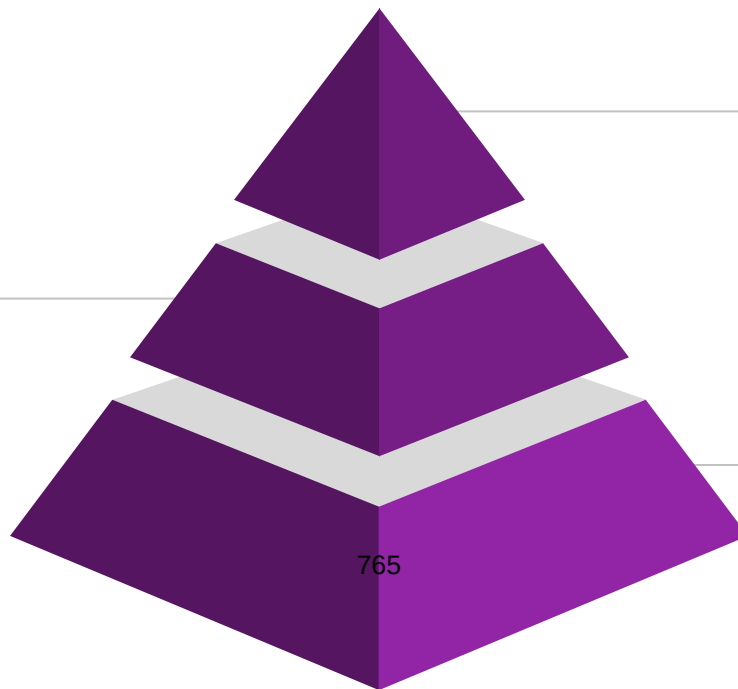
Action items 2020



Student Devices and Deployment

Chromebooks vs windows laptops
iPads for K-2
Mobile Device Management and security
Standard Operating Procedures
Manual for Technology Services

2



765

Pandemic Instruction/work

3

Learning Management system
Zoom for Teachers
Frontline TEAM off network for all
Cybersecurity
Increase number of devices for 1:1

Minimum Technology Standard for Teachers

1

Laptop
Projector w/sound
Document camera
Webcam
Speakers
Monitor
4 year life cycle plan for replacement of technology

Technology Services 2021 Survey



Student Survey

Please put in order how you think Waco ISD should prioritize spending to help you with your learning. Por favor, ponga en orden cómo cree que Waco ISD debería priorizar los gastos para ayudarlo con su aprendizaje.

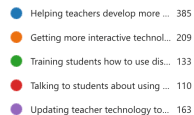
[More Details](#)



What do you think is the most important thing that Waco ISD needs to focus on with technology in instruction? ¿Qué crees que es lo más importante en lo que Waco ISD debe enfocarse con la tecnología en la instrucción?

[More Details](#)

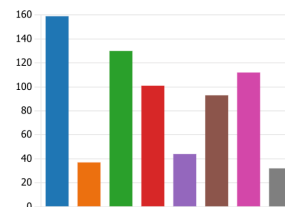
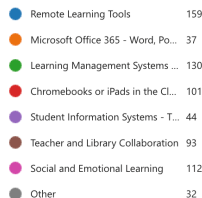
[Insights](#)



Faculty Survey

Which of the following Waco ISD supported Digital Tools do you feel you need additional training?

[More Details](#)



Parent Survey

If the school does not provide connected devices (e.g. laptop or tablet), does every school-age child in your home have access to a connected device sufficient to engage in remote learning (e.g. complete internet-based homework assignments or participate in online video classes)?

Si el distrito escolar no de apoyo dedispositivos (por ejemplo: laptops o tabletas), se encuentran los habitantes deedad escolar con acceso a dispositivos con capacidad para participar enaprendizaje escolar (por ejemplo: tareas basadas en la conexión de internet oparticipar en clases que usan video)?

[More Details](#)

[Insights](#)



Key takeaways from surveys:
Training needed for teachers: Student and Faculty voice

Action items 2021



1

Teacher training: Instructional Technology

- Partnership with Texas Computer Education Association for on-demand/online training.
- Added Canvas and Seesaw for LMS.

2

Deployment of devices to all faculty and students

- Deployed 1:1 for all students 6 - 12th grade. Classroom sets for PK - 5th grade.
- Over 12,500 devices deployed to our campuses

3

Network and connectivity

- Initiated Private Fiber connectivity to all campuses.
- Upgraded all WiFi access points and switches across the district
- Added external WiFi to 6 strategic campuses.
- Partnered with T-Mobile to receive 2234 hot spots as part of the Project 10 Million, and 4,250 from Emergency Connectivity Funding.

4

Creation of the "Principal Classroom"

- Upgrades all campuses Cafeteria stage audio visual technology for community and parent events.

Technology Services 2022 Survey



Student Survey

Please put in order how you think Waco ISD should prioritize spending to help you with your learning. Por favor, ponga en orden cómo cree que Waco ISD debería priorizar los gastos para ayudarlo con su aprendizaje.

[More Details](#)



What do you think is the most important thing that Waco ISD needs to focus on with technology in instruction? ¿Qué crees que es lo más importante en lo que Waco ISD debe enfocarse con la tecnología en la instrucción?

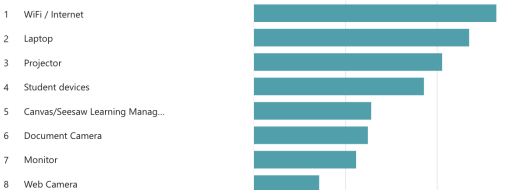
[More Details](#)



Faculty Survey

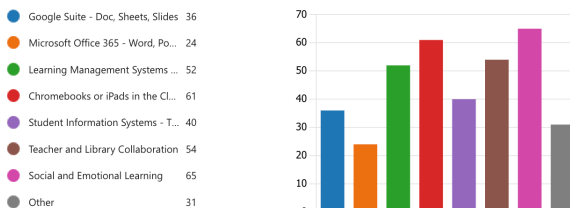
Which of the following are the most necessary to teaching with technology? Please rank in order from most important to least important.

[More Details](#)



Which of the following Waco ISD supported Digital Tools do you feel you need additional training?

[More Details](#)



Parent Survey

Do you feel like the Technology issued to your child(ren) is utilized and enhancing the education received in Waco ISD?

[More Details](#)

[Insights](#)



If the school does not provide connected devices (e.g. laptop or tablet), does every school-age child in your home have access to a connected device sufficient to engage in learning (e.g. complete internet-based homework assignments or participate in online video classes)?

Si el distrito escolar no de apoyo dedispositivos (por ejemplo: laptops o tabletas), se encuentran los habitantes deedad escolar con acceso a dispositivos con capacidad para participar enaprendizaje escolar (por ejemplo: tareas basadas en la conexión de internet oparticipar en clases que usan video)?

[More Details](#)

[Insights](#)



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Key takeaways from surveys:

Classrooms need updates and Teachers will need more training on blended learning vs online teaching

Action items 2022



Classroom Training

Purposeful training for migration of teachers back to a blended learning model vs Covid 19 remote learning styles.

- “Chromebooks Educator: Chromebooks in the classroom”
- “Canvas/Seesaw Educator”
- “Remote Educator: Remote learning tools”
- “Google Suite Level 1,2”

Classroom Upgrades

Meaningful upgrades to the classroom technology for engagement.

- Upgraded 256 Chalkboards with magnetic whiteboards.
- Installed over 186 classroom projectors with sound.
- Upgraded instructional technology including student devices
- Upgraded teacher laptops
- Upgraded Library furniture and technology to include interactive panels.

Network/Cybersecurity Initiatives

Designing more robust disaster recovery and operational network.

- Private fiber to every campus.
- Disaster Recovery site established within the district.
- Security gap assessments by multiple vendors
- Security protocols established for Incident Response.

Instructional Technology Training



2020-2021 school year

- 5 TCEA courses were offered to all staff members.

2021-2022 school year

- 7 TCEA courses were offered to all staff members.

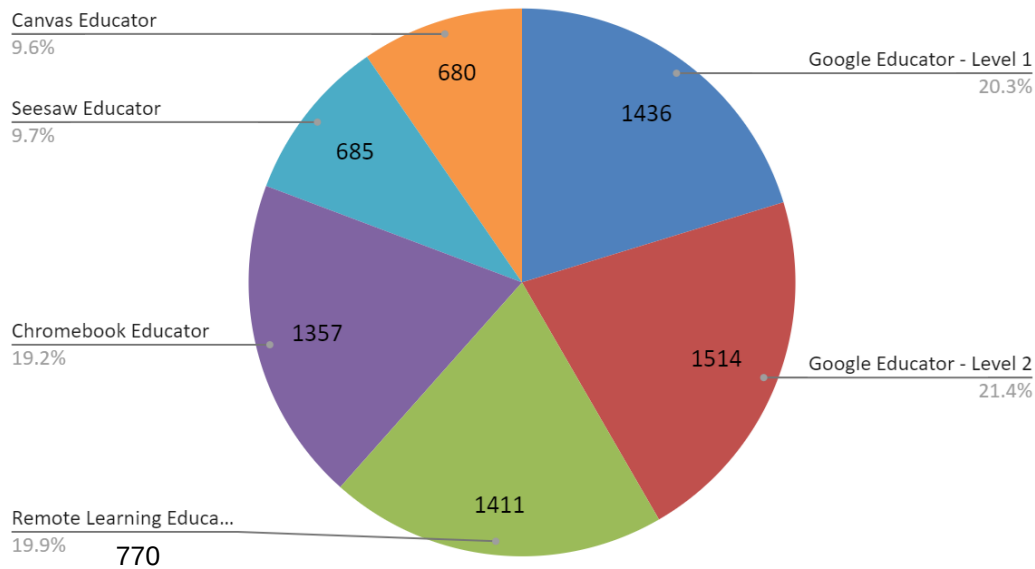
2022-23 school year

- [51 TCEA courses](#) were offered to all staff members. Staff enrolled in 597 courses and continue to enroll daily.

Top Courses and Enrollments:

Google Educator - Level 1:	1,436
Google Educator - Level 2:	1,514
Remote Learning Educator:	1,411
Chromebook Educator:	1,357
Seesaw Educator:	685
Canvas Educator:	680

Instructional Technology Training 2020 - 2023



2-year Emergency Connectivity Funding



The FCC's Emergency Connectivity Fund (ECF) is a \$7.171 billion program that will help schools and libraries provide the tools and services their communities need for remote learning during the COVID-19 emergency period. ECF will help provide relief to millions of students, school staff, and library patrons and will help close the Homework Gap for students who currently lack necessary Internet access or the devices they need to connect to classrooms.

For eligible schools and libraries, the ECF Program will cover reasonable costs of laptop and tablet computers; Wi-Fi hotspots; modems; routers; and broadband connectivity purchases for off-campus use by students, school staff, and library patrons.

Type of Devices	Quantity	Funding
Student Devices	16,525	\$ 5,809,127.50
Staff Devices	2,454	\$ 965,650.00
Tmobile Hot Spots	4,250	\$ 1,679,250.00
Total Devices	23,229	\$ 8,454,027.50

3-year E-rate funding

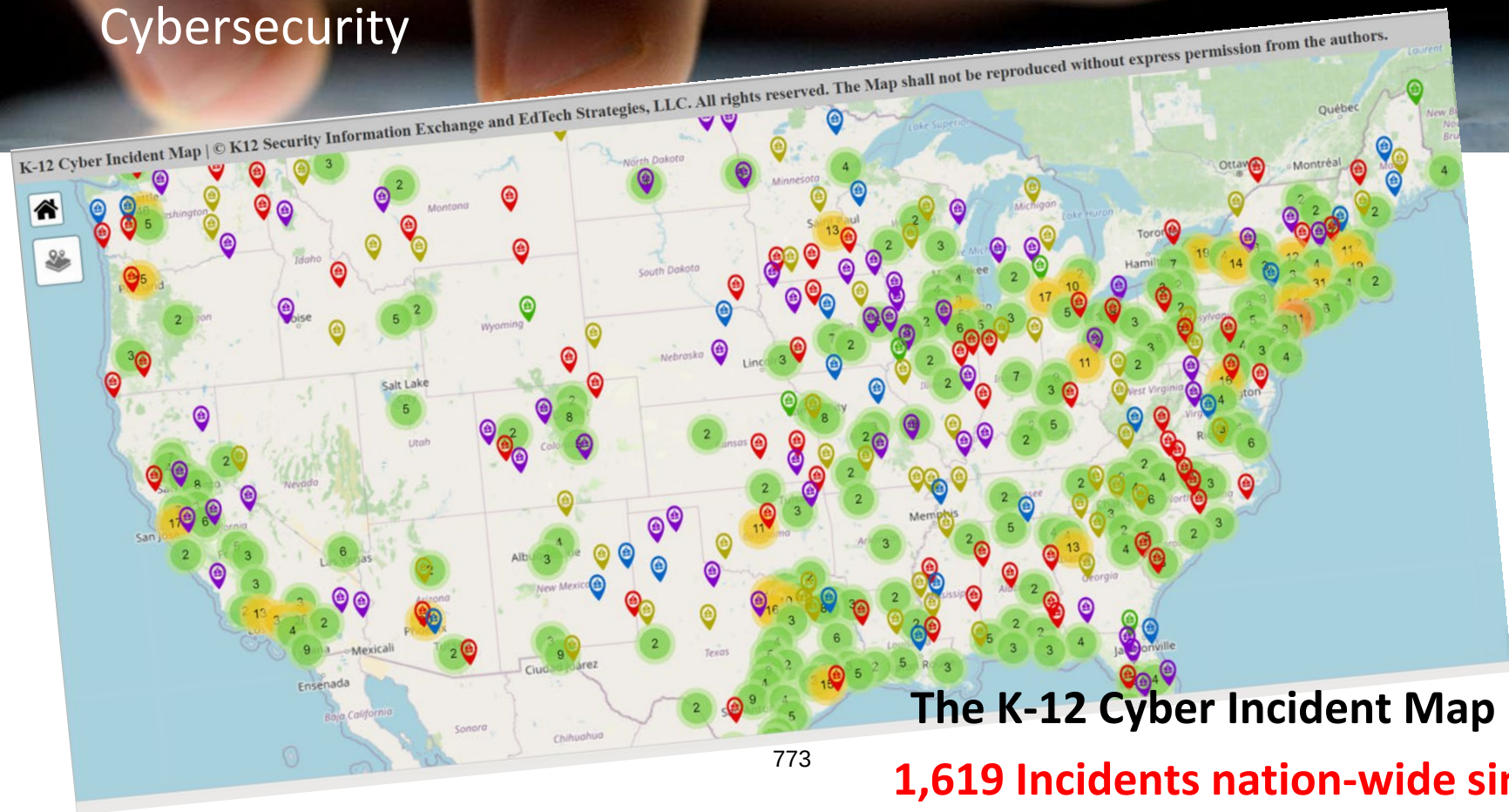


The schools and libraries universal service support program, commonly known as the E-rate program, helps schools and libraries to obtain affordable broadband.

Funding may be requested under two categories of service: category one services to a school or library (telecommunications, telecommunications services and Internet access), and category two services that deliver Internet access within schools and libraries (internal connections, basic maintenance of internal connections, and managed internal broadband services). Discounts for support depend on the level of poverty and whether the school or library is located in an urban or rural area. The discounts range from 20 percent to 90 percent of the costs of eligible services.

Type	Total	Erate	District
Dark Fiber Leasing	\$2,085,258.20	\$1,961,732.38	\$123,525.82
Internet Access	\$325,305.16	\$292,774.64	\$32,530.52
Infrastructure Equipment	\$948,993.31	\$831,286.20	\$117,707.11
Total	77\$3,359,556.67	\$3,085,793.22	\$273,763.45
Precent	100.00%	91.85%	8.15%

Cybersecurity



The K-12 Cyber Incident Map

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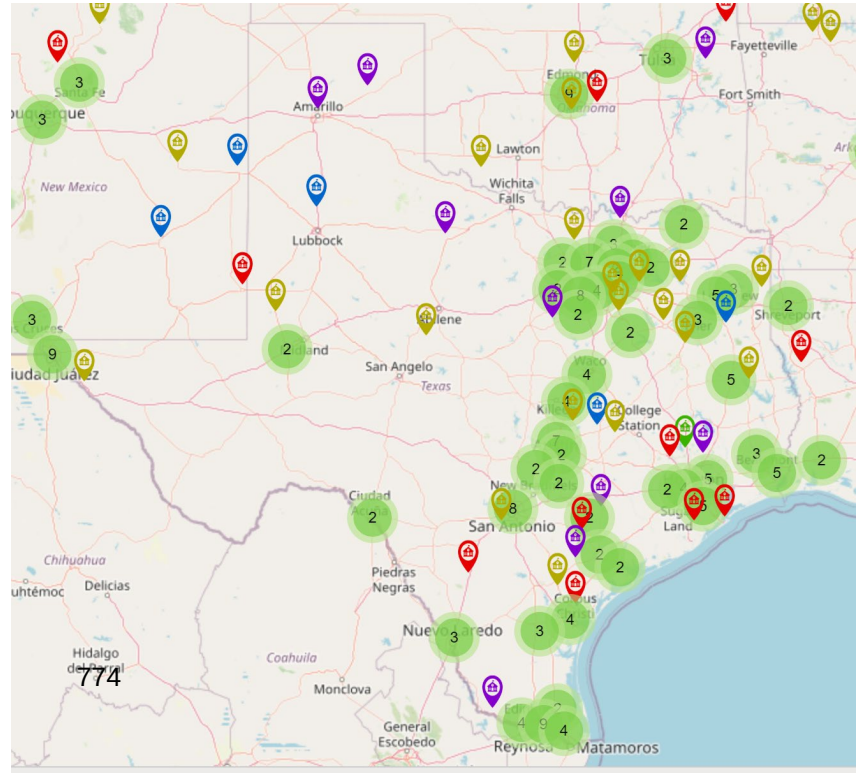
**1,619 Incidents nation-wide since
January 2016**



Cybersecurity Incidents in Texas

175+ in
Texas since
2016

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[NEWSNATION]

Cybersecurity and Technology Legislation

HOUSE BILL 3834—REQUIRED CYBERSECURITY TRAINING FOR STATE AND LOCAL EMPLOYEES

Required Cybersecurity Training: All local governments, including school districts, must annually identify for cybersecurity training those trustees and employees who have access to district computer systems or databases and who use a computer to perform at least 25 percent of required duties. Training must be DIR certified.

The only district employee required to complete annual cybersecurity training is the district's cybersecurity coordinator.

Trustees are not excluded from the requirement; therefore, the conservative approach is to train all identified trustees on an annual basis. Tex. Educ. Code § 11.175(g); Tex. Gov't Code § 2054.5191(a-1), (b); see also Tex. Gov't Code § 2054.003(9)

HOUSE BILL 4390—DATA BREACH NOTIFICATION

A person who conducts business in Texas and owns or licenses computerized data with sensitive personally identifiable information must disclose a breach of system security "without unreasonable delay" and within 60 days after the data breach was determined to have occurred. The person must notify the AG of the breach within 60 days if the breach involves at least 250 residents of this state.



SENATE BILL 820—SCHOOL DISTRICT CYBERSECURITY POLICY

Every school district must adopt a cybersecurity policy to secure district cyberinfrastructure against cyberattacks and other cybersecurity incidents, determine cybersecurity risk, and implement mitigation planning.

Each superintendent must designate a cybersecurity coordinator to serve as a liaison between the district and TEA.

The coordinator must report any cyberattack or other cybersecurity incident as soon as practicable after discovery and notify parents if the incident involved the parents' student information.

Challenges and Threats to K-12 Cybersecurity

Challenges of K-12 cybersecurity

- Lack of teacher and administrator cybersecurity awareness.
- A reactive, rather than proactive, security culture.
- Lack of understanding regarding cybersecurity risks and cyberattacks.
- Lack of certified cybersecurity professionals

Top threats to cybersecurity in K -12

- Phishing Scams/Social Engineering.
- Ransomware Attacks.
- Data Breaches.
- Distributed Denial of Service Attacks.
- Zoom Bombing.



