



Oakdale Public School Board of Education Regular Meeting  
Tuesday, June 9, 2020  
6:00 PM

Fine Arts Building - Auditorium, 10901 N. Sooner, 5701 E Hefner, Edmond, Oklahoma 73013

1. **Routine Items:**

- Call to Order
- Roll Call
- Establishment of a Quorum

2.

3. **Pledge of Allegiance / Moment of Silence**

4. **Public Comment:** See attachment

5. **Staff Reports, Presentations, and/or Recognitions:**

- Superintendent's Update: Dr. Joe Pierce
- Director of Operations & Athletics: Mike Franz
- Elementary School Principal: Jenna Foster
- Middle School Principal: Jill Willhoite

6.

7. **Consent Agenda:** The following items concern reports and items of a routine nature normally approved at Board meetings. They will be considered and voted on together as a group with one vote; provided that any Board member may ask that one or more items be considered and voted on separately. The Consent Agenda includes discussion, consideration, and possible action upon the following items:

1. Approve minutes of the May 12, 2020 regular board meeting.
2. Accept financial reports (expenditures, treasurer's report, financial statements, and investments) for the month ending May 31, 2020.
3. General fund payments # 2808-#2823  
Building fund payments #551-#569  
Bond Fund payments #161-#161  
Activity Fund payments # 378-#411
4. Declare district equipment, technology devices, furniture, fixtures and other equipment (as listed and described in supporting document) as surplus and authorize administration to dispose of properly.

8. **Business Action Items:** Consideration, discussion, and possible action on the following action items:

1. Oklahoma School Assurance Group (OSAG) quote for 2020-2021 workers' compensation coverage as outlined in proposal in the amount of \$17,527.
2. Oklahoma School Insurance Group (OSIG) quote for 2020-2021 coverage as outlined in proposal in the amount of \$100,009.
3. Discussion, consideration, and possible action on a resolution reaffirming the District's nondiscrimination policy and equitable treatment of all Oakdale students, faculty, and staff.

4. Approve proposed certified and support personnel actions listed in the Personnel Report.
9. **Discussion:** Reminder of dates and format for upcoming special board meetings for work sessions so that the Board may discuss and plan for long-term goals, strategy, initiatives, programs, and visioning for the District.
10. **Adjourn:** Possible consideration, discussion, and vote to adjourn.

All regular, special and emergency meetings of the Board of Education shall be open to the public.

The board wishes to hear the viewpoints of citizens throughout the district and considers the responsible presentation of these viewpoints vital to the efficient operation of the school system. Constructive criticism of the school is welcome whenever it is motivated by a sincere desire to improve the quality of the educational program or to allow the schools to do their tasks more effectively. The following regulation shall govern visitors attending board meetings.

1. Any individual wishing to address the board of education shall communicate such wish to the superintendent. The superintendent must know the nature of the matter to be discussed and the name(s) of the person(s) making the request. The notification must be received by the superintendent at least twenty-four hours prior to the next regularly scheduled meeting in order to be placed on the agenda. The superintendent must inform the board president of any individual or organization denied the opportunity to address the board of education.
2. The board may waive the advance notice requirement and allow "new business" items to be placed on the agenda at the regular meeting time only if such "new business" was not known about prior to the posting of the agenda and could not have been reasonably known about prior to posting.
3. The board clerk shall record all names of the visitors at board meetings.
4. The president of the board shall recognize speakers, maintain proper order, and adhere to time limits, if any, established by the board. Specifically, the president may require all proponents of one side of an issue to elect one spokesperson. Repetitive comments by consecutive individual will not be allowed.
5. Board members and administrative staff will not respond to questions or comments from the public. Proper questions from members of the public may be referred to the superintendent for later report to the board. The board will not be able to vote on matters brought forward by the public during public participation time if such matters are not specific agenda items. Such items may be placed on the agenda for the next meeting.
6. Members of the public shall not be recognized while the board is conducting its official business.
7. Since individual board members have no authority to resolve complaints, other than by formal board action, whenever a complaint is made directly to the board as a whole or to a board member as an individual, it will promptly be referred to the school administration for study and possible solution. Administrators are expected to follow up on all complaint referrals and to advise the board members of the nature of the complaint and the action(s) taken. The board expects that the administration will handle complaints courteously and that it will take steps to make a proper reply to the complainant. Follow-up shall be in the form of a written memorandum to the board members.
8. Anonymous complaints provide no avenue for response or redress of the complaint. Therefore, it will be the policy of the board that anonymous complaints shall not be pursued. An unsigned complaint will not be read or acted upon at any meeting of the board and anonymous telephone complaints will not be brought to the board by any individual board member, administrator, or other district employee. Further, the administration will not act on any anonymous complaint.

9. Complaints for which specific resolution procedures are provided shall be directed through those channels. This includes complaints about personnel, complaints about instructional materials, etc. Complaints should be resolved at the lowest possible level of authority. At the building level the principal will meet with persons who have a complaint and if necessary respond in writing within five working days of the meeting. If the complaint cannot be resolved at the building level, either party is encouraged to bring the matter to the attention of the superintendent of schools. The superintendent will respond in writing within five working days to all parties and the building principal. If all other remedies have been exhausted and a complaint can not be satisfactorily resolved, the complaint may be appealed to the board of education.
10. The board shall not hear personal complaints unless the proper administrative procedures concerning complaints have been followed. The board will not tolerate personal attacks on members of the board or the administrative staff. The board has confidence in its professional staff and desires to support their actions in order that they be free from unnecessary, spiteful, or negative criticism and complaint. No appeal will be heard by the board and no charges or accusations against an employee will be investigated or acted upon unless the accusations are reduced to writing, signed by the party making the complaint, and presented to the board through the superintendent.

In addition to the above, the board will request written reports be provided to the board prior to the meeting from the following:

1. The person against whom the complaint is made,
2. The principal of the school involved,
3. The superintendent, and
4. The complainant.

Generally, all parties involved will be asked to attend the board meeting for the purposes of presenting any additional facts, making further explanations, and clarifying the issues. The board will not consider or act upon complaints that have not been explored at the appropriate administrative level or complaints for which specific resolution procedures have been established that do not include board review. If the board decides to hear the complaint, the board shall make a decision which shall be sent to all interested parties. The board's decision is final.



# Return to Learn at Oakdale

June 9, 2020



# Considerations

- Admin Team met with the state health experts last week
- Crosswalked recommendations with new SDE guidance
- SuperSAC convening to gather faculty/staff feedback
- Parent survey prepared to gather community feedback
- Presentation in July
  - Safety and well-being of our community #1
  - Responsiveness with flexibility
  - Recommendations with alternative plans
  - Consistency with state & local orders/guidance



# Further Considerations

- Feasible?
- Practical?
- Acceptable?
- Tailored for Oakdale?
  
- Risk Factors considered (high/moderate/low)
- Not everyone will be 100% pleased with the plan
  - Too far...
  - Not far enough...
  - Lead with humility and responsiveness in unique situations



# Calendar

- Retain basic adopted school calendar start/end dates
- Additional contracted professional days for teachers
  - August 5: New teachers report (10am-2pm)
  - August 6, 7, 10, & 12: Returning teachers report for professional development
  - August 11: Digital Information Day
    - Welcome videos from teachers sent on August 11
    - Paid contract day for teachers
    - Perhaps some very limited interactions, by permission



**District will choose one option to implement.  
Parents are not selecting different options for their child.**

● **Option A: Traditional Learning**

- Traditional school model with all students attending every day as usual
- Layered protections & required procedures (e.g. masks when necessary/SD not practical)
- Middle school students on block schedule option

● **Option B: +21 Partial Distance Learning**

- Traditional schooling model with all students attending majority of days
- Predetermine required distance segments (~21 total days) built into calendar after breaks
- Students would do required distance learning during these segments
- Teachers and special populations would report to the school building
- Consideration/plans for staff members' children
- Full school cleanings during distance days

● **Option C: 2/1/2 Blended Distance Learning**

- Two groups of students. One group attends M-T and the other on Th-F
- Wednesdays: School is cleaned thoroughly
- Students are given direct instruction at school 2 days, then required work at home 3 days

● **Option D: 100% Distance Learning**

- All students use distance learning entirely throughout the Fall semester with Spring semester to be determined.



# Absence/Sick Protocols

- Current practices remain in place.
- If a student presents with fever & cough, they are automatically sent home with a sheet about contacting doctor or health department for a COVID test
- Student then stays home for ~2 weeks, or until released by their doctor
- Students will be able to participate in DL when home sick or waiting for test result
- Teachers will be mandated to STAY HOME when sick. No exceptions.
- Teachers will be highly encouraged to get a home thermometer and check temperature every morning before school (can use pod thermometers as well)
- No prizes or rewards for good/perfect attendance, etc. this school year.
- Examine sick leave/FMLA policies



# To mask or not to mask?

**Every student must have a mask or other approved face covering (buffs).**

**When will they wear it? Feasible? Practical?**

- On the bus. Transportation is optional. Drop off /pick up is encouraged
- During times or conditions **when social distancing is not feasible nor practical** (e.g. congested common areas, passing periods, drills)
- *Recommended* in the classroom **when feasible, practical, and not a distraction**
- Will develop guidelines (e.g. solid colors, no designs)
- At any other time as requested by the teacher or administrator
- Compliance with faculty directives is required!
- Parents may request permission that their child wear a mask/face covering at any/all other times (even if socially distanced)



# Cleaning & Sanitizing

- High touch areas will be sanitized at least three times during the school day
- Students will be greeted at each classroom door with hand sanitizer
- Students will be encouraged to bring their own water bottles daily
- Water fountains will be disabled, *except* for specific bottle refill stations
- Nurse's office and bathroom will be sanitized daily
- Bathrooms will be sanitized daily
- Lockers will be sanitized at least once a week
- Classrooms will be sanitized daily
- Lunch tables will be sanitized before/after each lunch period
- Buses will be sanitized at least 2 times daily after each use
- HVAC maximum ventilation with outdoor air



# Entry to the School Building

- Enter through usual entrances:
  - Doors will be propped open until 8:25 AM
  - Doors open when early buses arrive at 8:00 AM
- Students go directly to first hour classroom or to breakfast
- Teachers on mandatory hall/door duty
- Hand sanitizer given at classroom doors
- Teachers who have 1st hour plan are on duty in common hallways and pods at 8:00AM



# Classrooms & Hallways

- Distance desks/same direction, if possible
- No sharing objects, supplies, books
  - Pencil bags or boxes on list
  - Art students wear gloves during art class, if feasible
- Leave classroom doors open to minimize touching door knobs
- Students will wipe down their own desks and chairs before leaving a classroom
- Wear masks when possible (and/or at teacher's discretion)
- Specials classes- protocols as practical
- Students wear masks during passing periods
- Traffic flows in one direction as possible
- Hallways marked with arrows and signage to show flow patterns
- Possibly cover the walkway by art rooms connecting to Fine Arts Area



# Lunchroom Meal Times

- Alternate seats for social distancing / 50% seating
- Students may bring lunch from home or purchase a meal
- Served as they walk into the cafeteria (SD) or may be dismissed table by table to go through the lunch line (SD)
- Exploring meal options and regulations
- Grades alternate eating in rooms/cafe. 8th grade eats in MS pod.
- No guests/visitors for lunch. Lunch deliveries discouraged.
- Hand washing/sanitizing before eating
- Tables cleaned with virus killing product between lunches
- No "Lunch Buddies" parent volunteers
- Students must be able to open all items in a lunch box
- At least one or two teachers on lunch everyday



# Front Office

- Visitors permitted in the school **only** by appointment
  - Screened
  - Health log
- No lunch guests. Lunch deliveries discouraged
- Plexiglass needed for front entry office
- Sanitation station
- Digital touch screens - rice paper disposable option instead of wiping screen each time



# Bus Transportation

- Encourage parents to drop off and pick up students by car
- Look into crosswalk for Oakdale Valley students on Hefner Rd.
- Bus routes streamlined and simplified
- Spread out seating on buses, as much as possible
- Must wear masks on buses
- Open windows for ventilation
- Sanitized at least twice daily and between multiple routes
- Assigned seats for children
- Drivers wear masks



# Learning Gap: “Mind the Gap”

- **What are supposed to teach?**
  - Oklahoma Academic Standards
  - Beginning to use Curriculum Trackers/Data Trackers/Goal Setting
  - Standards-based accountability & reporting
- **Assess before instruction using pre-assessments**
  - **Where is each and every student now?**
    - SDE state contract for free assessments and other resources
  - **How do we fill any gaps in learning? Differentiate!**
    - Tiered instruction and assignments (no mass produced assignments)
    - Know students through questionnaires or interest inventories
  - **What do we do if they already have it?**
    - Extend/Apply/Enrich/Advance



# Facility Use

- Revise board policy as needed
- Explore restricting outside rentals during the school year
- Priority given for school events, then PTC and OSF
  - PTC & OSF events will follow all guidelines and protocols
- Charge extra for sanitation and supervision fees
- Make sure there is appropriate cleaning after each use of the facilities
- Require a liability insurance coverage naming the school as covered



# Athletics, Contests, Events

- Guidance from conference and other organizations
- Assemblies- not expected to host any at this time
- Field Trips- may be virtual - organizations will also determine
- Class Parties - placed on hold and will not be offered as usual
- Flu Clinic- available in the fall to kids and teachers
- Other trips - same as field trips / no out-of-state travel
- Contests - (e.g. band/choir) to be determined / high risk / unlikely



# Return to Learn at Oakdale

June 9, 2020

Board Minutes  
Oakdale Public School Board of Education Regular Meeting  
Tuesday, May 12, 2020 6:00 PM  
Kim Lanier Fine Arts Building

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President – Todd Corbin

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Vice President – Jerome Loughridge

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Clerk – Erin Hulsey

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Minutes Clerk - Marlene Martinez

**1. Call to Order / Roll Call / Establishment of a Quorum**

Attendance Taken at 6:00 PM.

Mr. Todd Corbin: Present

Erin Hulsey: Present

Jerome Loughridge: Present

Present: 3.

**2. Welcome & Recognition of Guests**

**3. Consent Agenda: The following items concern reports and items of a routine nature normally approved at Board meetings. They will be considered and voted on together as a group with one vote; provided that any Board member may ask that one or more items be considered and voted on separately. The Consent Agenda includes discussion, consideration, and possible action upon the following items.**

Consent Agenda passed with a motion by Erin Hulsey and a second by Jerome Loughridge.

Mr. Todd Corbin: Yea

Erin Hulsey: Yea

Jerome Loughridge: Yea

Yea: 3, Nay: 0

1. Minutes from the April 14, 2020 Regular Board Meeting

2. Expenditures

1. General Fund payments #2262-#2273

1. Child Nutrition payments included in the General Fund payments

2. Building Fund payments #502-#520

3. Activity Fund payments #369-#377

4. Bond Fund payments #135-#146

3. Monthly Treasurer Reports / Financial Statements // Investment Review

**4. Business**

1. Public Comment  
No comments were given

2. Superintendent's Report

1. Director of Operations & Athletics Report (Operations)
2. Administration Report (ES)
3. Administration Report (MS)

3. Independent Committee / Organization Reports  
No reports were given

**5. Furniture purchase for new building from Worthington Direct in the amount of \$12,057.40 from Bond Fund 34.**

Furniture purchase for new building passed with a motion by Erin Hulseley and a second by Jerome Loughridge.

Mr. Todd Corbin: Yea

Erin Hulseley: Yea

Jerome Loughridge: Yea

Yea: 3, Nay: 0

**6. Purchase technology items from Coast Audio Video in the amount of \$9,433.53 from Bond Fund 34.**

The purchase of technology equipment for the new building passed with a motion by Erin Hulseley and a second by Jerome Loughridge.

Mr. Todd Corbin: Yea

Erin Hulseley: Yea

Jerome Loughridge: Yea

Yea: 3, Nay: 0

**7. Purchase Chromebooks from CTL: Order #0242671 in the amount of \$76,000.00 from Bond Fund 34.**

Purchase of Chromebooks from CTL passed with a motion by Erin Hulseley and a second by Jerome Loughridge.

Mr. Todd Corbin: Yea

Erin Hulseley: Yea

Jerome Loughridge: Yea

Yea: 3, Nay: 0

**8. Purchase Chromebook Cases from CTL: Order #0243058 in the amount of \$5,500.00 from Bond Fund 34.**

Purchase of Chromebook cases from CTL passed with a motion by Erin Hulseley and a second by Jerome Loughridge.

Mr. Todd Corbin: Yea

Erin Hulseley: Yea

Jerome Loughridge: Yea

Yea: 3, Nay: 0

**9. Student transfer requests as recommended by Superintendent.**

Student transfers per district policy and recommended by the Superintendent passed with a motion by Erin Hulseley and a second by Jerome Loughridge.

Mr. Todd Corbin: Yea

Erin Hulseley: Yea

Jerome Loughridge: Yea

Yea: 3, Nay: 0

**10. Contract agreement with Shelley Ryland for contracted Speech/Language services for 2020-21.**

Employment of Shelley Ryland speech/language services for 2020-21 passed with a motion by Erin Hulseley and a second by Jerome Loughridge.

Mr. Todd Corbin: Yea

Erin Hulseley: Yea

Jerome Loughridge: Yea

Yea: 3, Nay: 0

**11. Mutual Agreement between Oklahoma County and Oakdale Public School District for Reconstruction, improvement, repair or maintenance of property owned by the the school district.**

Mutual Agreement between Oklahoma County and Oakdale Public School passed with a motion by Erin Hulseley and a second by Jerome Loughridge.

Mr. Todd Corbin: Yea

Erin Hulseley: Yea

Jerome Loughridge: Yea

Yea: 3, Nay: 0

**12. Contract greement with Alcohol and Drug Testing, Inc. (ADTI) for drug/alcohol testing services for 2020-21.**

Contract agreement with Alcohol and Drug Testing services for the 2020-2021 school year passed with a motion by Erin Hulseley and a second by Jerome Loughridge.

Mr. Todd Corbin: Yea

Erin Hulseley: Yea

Jerome Loughridge: Yea

Yea: 3, Nay: 0

**13. Rehire faculty & staff as recommended by administrators and as listed on personnel report.**

Rehire faculty & Staff as recommended by the administrators as listed on attached report passed with a motion by Erin Hulseley and a second by Jerome Loughridge.

Mr. Todd Corbin: Yea

Erin Hulseley: Yea

Jerome Loughridge: Yea

Yea: 3, Nay: 0

**14. Application for Approval of Temporary Appropriations for the Fiscal Year 2020-21.**

Temporary Appropriations for the 2020-2021 school year passed with a motion by Erin Hulseley and a second by Jerome Loughridge.

Mr. Todd Corbin: Yea

Erin Hulseley: Yea

Jerome Loughridge: Yea

Yea: 3, Nay: 0

**1. Declare district office equipment, athletic equipment, and building supplies as surplus and authorize administration to dispose of properly.**

Declare district equipment and building supplies as surplus and authorize administration to dispose of properly passed with a motion by Erin Hulseley and a second by Jerome Loughridge.

Mr. Todd Corbin: Yea

Erin Hulseley: Yea

Jerome Loughridge: Yea

Yea: 3, Nay: 0

**15. Discussion of establishing a series of special board meetings for work sessions so that the Board may discuss and plan for long-term goals, strategy, initiatives, programs, and visioning for the District.**

**16. Adjournment**

Adjourn school board meeting @ 7:00 p.m. passed with a motion by Erin Hulseby and a second by Jerome Loughridge.

Mr. Todd Corbin: Yea

Erin Hulseby: Yea

Jerome Loughridge: Yea

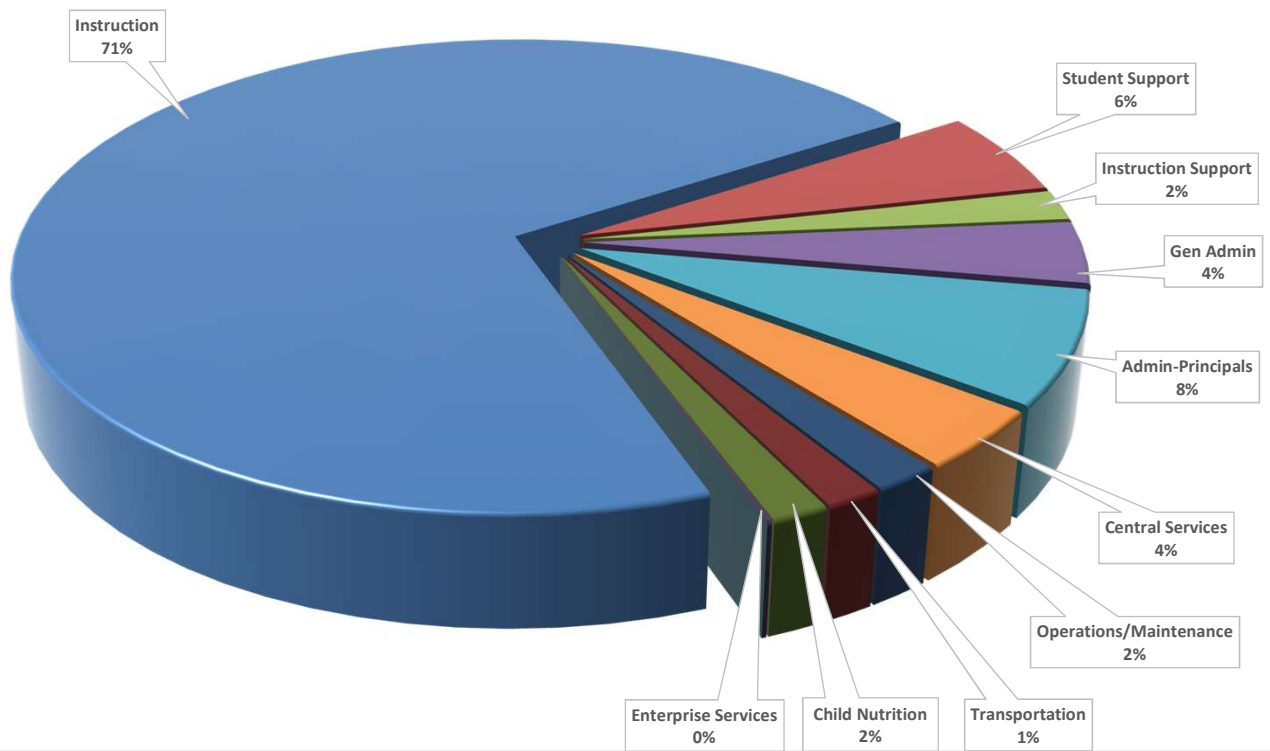
Yea: 3, Nay: 0



**Oakdale School**  
**55-C029**

**FY20 Financial Report**  
**May 31, 2020**

**General Fund Expenditures  
as of MAY 31, 2020**



**Oakdale Public Schools**  
**Cash Balances - Appropriated Funds**  
**May 31, 2020**

	Less:		Cash Balances 5/31/2020	Comparison 5/31/2019	Comparison 5/31/2018
	Balance 5/31/2020	O/S Warrants 5/31/2020			
<b>General Fund</b>					
2019-20 FY	1,357,709.05	181,039.81	1,176,669.24		
2018-19 FY	410.09	410.09	0.00		
<b>Total</b>	1,358,119.14	181,449.90	1,176,669.24	1,355,493.35	969,030.98
<b>Building Fund</b>					
2019-20 FY	185,551.91	0.00	185,551.91		
2018-19 FY	42.00	42.00	0.00		
<b>Total</b>	185,593.91	42.00	185,551.91	145,408.41	91,832.86
<b>Building Bond Funds</b>					
BBF (Fund 34)	467,543.13	50,009.82	417,533.31	-	-
BBF (Fund 35)	90,493.80	3,483.02	87,010.78	-	-
<b>Total</b>	558,036.93	53,492.84	504,544.09	3,230,930.74	8.51
<b>Sinking Fund</b>	2,511,828.01	0.00	2,511,828.01	2,702,238.73	1,862,752.91
<b>Total Cash Balances</b>	4,613,577.99	234,984.74	4,378,593.25	7,434,071.23	2,923,625.26

**All Appropriated Funds  
Treasurer's Activity  
7/1/2019 to 5/31/2020**

<u>ASSETS</u>	Beginning Balance	Deposits	Net Transfers	Disbursements	Ending Balance
FNB of MWC					
Checking - General Fund	5,777,278.71	9,010,259.41	(5,405.31)	10,168,554.82	4,613,577.99
Fiscal Agent - Sinking Fund	1,488,742.50	0.00	0.00	1,488,742.50	0.00
<b>Total Assets</b>	<b>7,266,021.21</b>	<b>9,010,259.41</b>	<b>(5,405.31)</b>	<b>11,657,297.32</b>	<b>4,613,577.99</b>
<u>LIABILITIES</u>					
General Fund					
2019-20 FY	1,221,526.24	4,987,977.70	(5,405.31)	4,846,389.58	1,357,709.05
2018-19 FY	82,419.21	0.00	0.00	82,009.12	410.09
Total General Fund	1,303,945.45	4,987,977.70	(5,405.31)	4,928,398.70	1,358,119.14
Building Fund					
2019-20 FY	95,186.78	558,931.49	0.00	468,566.36	185,551.91
2018-19 FY	14,117.45	0.00	0.00	14,075.45	42.00
Total Building Fund	109,304.23	558,931.49	0.00	482,641.81	185,593.91
Building Bond Funds					
BBF (Fund 34)	3,133,441.24	0.00	0.00	2,665,898.11	467,543.13
BBF (Fund 35)	0.00	600,000.00	0.00	509,506.20	90,493.80
Total BBF	3,133,441.24	600,000.00	0.00	3,175,404.31	558,036.93
Sinking Fund	2,719,330.29	2,863,350.22	0.00	3,070,852.50	2,511,828.01
<b>Total Liabilities</b>	<b>7,266,021.21</b>	<b>9,010,259.41</b>	<b>(5,405.31)</b>	<b>11,657,297.32</b>	<b>4,613,577.99</b>

**Comments:**

The amount shown in the net transfers column represents the following:

Bank service charges - General	350.00
Bank service charges - CNP	4,920.24
<b>Total</b>	<u>5,270.24</u>

**Investment Report**                      24,947.49

**OAKDALE SCHOOL  
GENERAL FUND EXPENDITURES  
May 31, 2020**

	FY18 Expenditures		FY19 Expenditures		FY20 Expenditures	
	Payroll	Non-Payroll	Payroll	Non-Payroll	Payroll	Non-Payroll
July	49,398.82	56,211.61	74,679.73	52,205.09	44,585.30	51,869.94
August	189,677.49	51,158.30	178,172.55	80,862.57	204,087.56	28,594.57
September	334,407.00	70,157.91	373,625.32	22,470.80	383,903.33	25,483.55
October	343,635.27	80,574.47	370,468.67	67,275.37	385,767.35	31,172.79
November	337,002.48	54,093.81	372,992.56	30,423.88	384,492.08	73,913.92
December	340,078.90	71,453.52	362,449.37	27,851.88	434,272.85	29,833.38
January	425,733.55	52,128.22	361,243.27	15,996.44	392,865.27	22,578.66
February	359,866.38	41,113.65	373,854.82	38,817.38	385,488.81	30,222.76
March	343,333.25	42,295.08	388,987.79	17,226.09	412,508.75	35,806.11
April	356,883.80	29,646.50	380,337.90	13,076.07	406,668.45	14,157.63
May	1,063,310.11	34,072.11	1,110,612.81	34,387.69	1,247,218.61	12,000.16
June	50,810.39	39,222.07	270,778.53	42,689.97		
<b>TOTALS</b>	<b>4,194,137.44</b>	<b>622,127.25</b>	<b>4,618,203.32</b>	<b>443,283.23</b>	<b>4,681,858.36</b>	<b>355,633.47</b>

4,816,264.69

5,061,486.55

5,037,491.83

**YTD Comparison**

	FY18 Expenditures		FY19 Expenditures		FY20 Expenditures	
	Payroll	Non-Payroll	Payroll	Non-Payroll	Payroll	Non-Payroll
July	49,398.82	56,211.61	74,679.73	52,205.09	44,585.30	51,869.94
August	189,677.49	51,158.30	178,172.55	80,862.57	204,087.56	28,594.57
September	334,407.00	70,157.91	373,625.32	22,470.80	383,903.33	25,483.55
October	343,635.27	80,574.47	370,468.67	67,275.37	385,767.35	31,172.79
November	337,002.48	54,093.81	372,992.56	30,423.88	384,492.08	73,913.92
December	340,078.90	71,453.52	362,449.37	27,851.88	434,272.85	29,833.38
January	425,733.55	52,128.22	361,243.27	15,996.44	392,865.27	22,578.66
February	359,866.38	41,113.65	373,854.82	38,817.38	385,488.81	30,222.76
March	343,333.25	42,295.08	388,987.79	17,226.09	412,508.75	35,806.11
April	356,883.80	29,646.50	380,337.90	13,076.07	406,668.45	14,157.63
May	1,063,310.11	34,072.11	1,110,612.81	34,387.69	1,247,218.61	12,000.16
June						
<b>TOTALS</b>	<b>4,143,327.05</b>	<b>582,905.18</b>	<b>4,347,424.79</b>	<b>400,593.26</b>	<b>4,681,858.36</b>	<b>355,633.47</b>

4,726,232.23

4,748,018.05

5,037,491.83

**OAKDALE SCHOOL  
GENERAL FUND EXPENDITURES  
May 31, 2020**

<b>Personnel Expenses</b>		<b>2019-20</b>	<b>MAY</b>	<b>2019-2020</b>	<b>% of YTD</b>
<b>OBJECT</b>	<b>DESCRIPTION</b>	<b>BUDGET</b>	<b>2020</b>	<b>YEAR-TO-DATE</b>	<b>TO BUDGET</b>
100-299	Personnel	<u>4,712,984.41</u>	<u>1,247,218.61</u>	<u>4,681,858.36</u>	<u>99.34%</u>
	<b>Total Personnel</b>	<b><u>4,712,984.41</u></b>	<b><u>1,247,218.61</u></b>	<b><u>4,681,858.36</u></b>	<b><u>99.34%</u></b>
<b>Non-Personnel Expenses</b>					
310	Administrative Services	32,339.00	-	26,689.00	82.5%
320	Professional Education Services	7,391.36	50.00	6,934.24	93.8%
321	Instructional Program Improvement	806.25	-	806.25	100.0%
331	Accounting & Audit Services	5,471.10	-	453.10	8.3%
336	Medical Services	15,221.00	-	1,602.54	10.5%
346	Technology Services	2,282.50	-	2,282.50	100.0%
358	Legal Services	2,966.00	-	2,654.00	89.5%
359	Employee Training	1,154.00	-	1,154.00	100.0%
360	Professional Employee Training	4,916.00	-	2,094.00	42.6%
420	Cleaning Services	1,354.42	-	-	0.0%
440	Rentals	630.00	-	630.00	100.0%
450	Construction Services	7,298.80	-	7,298.80	100.0%
522	Liability Insurance	7,536.00	-	7,536.00	100.0%
524	Vehicle Insurance	5,968.00	-	5,968.00	100.0%
525	Surety Bonds	1,852.50	-	1,852.50	100.0%
530	Communication Services	31,285.61	225.17	16,282.66	52.0%
540	Advertising	713.61	-	398.83	55.9%
580	Staff Travel	2,120.98	-	338.00	15.9%
611	Copy Supplies	12,625.05	-	9,075.12	71.9%
612	Automotive & Bus Supplies	38,333.58	70.52	455.13	1.2%
614	Testing Supplies	3,085.29	-	875.05	28.4%
616	First Aid	450.00	-	361.55	80.3%
617	Kitchen Supplies	7,404.19	316.72	6,662.47	90.0%
618	Maintenance Supplies	21,720.21	-	708.98	3.3%
619	Classroom/Office Supplies	46,766.16	569.31	26,425.42	56.5%
625	Gasoline	12,943.50	-	11,829.21	91.4%
630	Food and Milk	92,057.59	8,117.34	81,746.78	88.8%
639	Other Food Costs	2,734.98	120.60	1,935.62	70.8%
641	Books	935.84	-	850.30	90.9%
643	Textbooks	33,357.71	-	9,328.21	28.0%
646	Binding	693.38	-	693.38	100.0%
652	Audiovisual	13,503.71	-	5,256.34	38.9%
653	Technology Related Supplies	59,568.59	-	49,714.46	83.5%
654	Furniture and Fixtures	4,005.00	-	4,005.00	100.0%
657	Uniforms	436.00	-	-	0.0%
681	Co-curricular Activities	2,800.00	-	2,800.00	100.0%
733	Technology Software and Equipment	2,400.00	-	-	0.0%
810	Dues and Fees	18,762.11	2.05	5,353.35	28.5%
833	Interest on Non-Payable Warrants	-	-	-	0.0%
850	Game Contracts & Guarantees	6,000.00	-	6,000.00	100.0%
860	Staff Registration & Tuition	1,200.00	-	469.99	39.2%
870	County Assessments/Revaluation Fees	43,584.24	-	43,584.24	100.0%
930	Reimbursement	2,528.45	2,528.45	2,528.45	100.0%
	<b>Total Non-Personnel</b>	<b><u>559,202.71</u></b>	<b><u>12,000.16</u></b>	<b><u>355,633.47</u></b>	<b><u>63.6%</u></b>
	<b>TOTALS</b>	<b><u>5,272,187.12</u></b>	<b><u>1,259,218.77</u></b>	<b><u>5,037,491.83</u></b>	<b><u>95.5%</u></b>

**Oakdale Public Schools**  
**Summary of Monthly Revenue - By Fund**  
**2019-2020 FY**

<b>Month</b>	<b>Total</b>	<b>General Fund</b>	<b>Building Fund</b>	<b>BBF (Fund 34)</b>	<b>BBF (Fund 35)</b>	<b>Sinking Fund</b>
<b>7-2019</b>	618,226.43	18,193.10	0.00	0.00	600,000.00	33.33
<b>8</b>	106,741.67	92,865.82	5,719.77	0.00	0.00	8,156.08
<b>9</b>	96,019.98	89,619.77	1,096.81	0.00	0.00	5,303.40
<b>10</b>	92,999.98	86,467.44	1,085.65	0.00	0.00	5,446.89
<b>11</b>	546,938.06	347,026.80	32,792.37	0.00	0.00	167,118.89
<b>12</b>	2,064,447.44	1,150,038.35	148,186.74	0.00	0.00	766,222.35
<b>1-2020</b>	3,593,339.03	2,004,656.55	257,099.35	0.00	0.00	1,331,583.13
<b>2</b>	139,192.58	115,233.71	3,937.74	0.00	0.00	20,021.13
<b>3</b>	757,089.27	444,442.75	51,429.45	0.00	0.00	261,217.07
<b>4</b>	748,810.57	455,410.92	47,480.36	0.00	0.00	245,919.29
<b>5</b>	246,454.40	184,022.49	10,103.25	0.00	0.00	52,328.66
<b>6</b>	0.00					
<b>Total</b>	<b>9,010,259.41</b>	<b>4,987,977.70</b>	<b>558,931.49</b>	<b>0.00</b>	<b>600,000.00</b>	<b>2,863,350.22</b>

**Oakdale Public Schools  
Warrants Issued By Month - By Fund  
2019-2020 FY**

Month	Total	<u>General Fund</u>		<u>Building Fund</u>		(Fund 34)	(Fund 35)	Sinking
		2019-20 FY	2018-19 FY	2019-20 FY	2018-19 FY	BBF	BBF	Fund
<b>7-2019</b>	2,101,639.15	96,455.24	15,158.55	91,024.95	12,413.92	386,593.99	11,250.00	1,488,742.50
<b>8</b>	899,395.86	232,682.13		42,238.14		199,099.39	425,376.20	
<b>9</b>	829,052.84	409,386.88		39,627.46		307,158.50	72,880.00	
<b>10</b>	1,066,079.46	416,940.14		44,054.04		291,210.28		313,875.00
<b>11</b>	955,127.24	458,406.00		41,085.32		394,948.42		60,687.50
<b>12</b>	860,347.62	464,106.23		35,378.17		350,940.72		9,922.50
<b>1-2020</b>	596,418.42	415,443.93		34,363.66		146,610.83		
<b>2</b>	737,629.22	415,711.57		32,803.42		289,114.23		
<b>3</b>	645,869.05	448,314.86		35,415.82		162,138.37		
<b>4</b>	551,752.68	420,826.08		39,681.73		89,307.37		1,937.50
<b>5</b>	2,586,289.27	1,258,922.29		32,893.65		98,785.83		1,195,687.50
<b>6</b>	0.00							
<b>Totals</b>	<b>11,829,600.81</b>	<b>5,037,195.35</b>	<b>15,158.55</b>	<b>468,566.36</b>	<b>12,413.92</b>	<b>2,715,907.93</b>	<b>509,506.20</b>	<b>3,070,852.50</b>

**Oakdale Public Schools  
Warrants Paid By Month - By Fund  
2019-2020 FY**

Month	Total	General Fund		Building Fund		(Fund 34)	(Fund 35)	Sinking
		2019-20 FY	2018-19 FY	2019-20 FY	2018-19 FY	BBF	BBF	Fund
<b>7-2019</b>	2,149,516.65	96,116.24	61,852.52	90,885.95	14,075.45	386,593.99	11,250.00	1,488,742.50
<b>8</b>	541,774.83	230,382.61	20,135.11	40,591.52		199,099.39	51,566.20	
<b>9</b>	1,146,100.90	409,616.82	21.49	41,116.70		248,655.89	446,690.00	
<b>10</b>	1,122,749.75	416,891.44		44,350.42		347,632.89		313,875.00
<b>11</b>	941,904.52	457,208.28		41,085.32		382,923.42		60,687.50
<b>12</b>	714,355.92	460,441.25		35,378.17		208,614.00		9,922.50
<b>1-2020</b>	726,335.97	418,953.49		34,363.66		273,018.82		
<b>2</b>	750,172.26	407,023.18		32,669.42		310,479.66		
<b>3</b>	621,490.46	455,211.82		35,549.82		130,728.82		
<b>4</b>	494,225.22	375,767.54		39,007.57		77,512.61		1,937.50
<b>5</b>	2,458,436.80	1,128,542.87		33,567.81		100,638.62		1,195,687.50
<b>6</b>	0.00							
<b>Total</b>	<b>11,667,063.28</b>	<b>4,856,155.54</b>	<b>82,009.12</b>	<b>468,566.36</b>	<b>14,075.45</b>	<b>2,665,898.11</b>	<b>509,506.20</b>	<b>3,070,852.50</b>

**Oakdale Public Schools  
Warrant Accounts - By Funds  
2019-20 FY**

<b><u>2019-20 FY</u></b>	<b>Total</b>	<b>General</b>	<b>Building</b>	<b>BBF (34)</b>	<b>BBF (35)</b>	<b>Sinking (41)</b>
<b>O/S @ 7-01-19</b>	0.00	0.00	0.00	0.00	0.00	0.00
Issued to Date	11,802,028.34	5,037,195.35	468,566.36	2,715,907.93	509,506.20	3,070,852.50
Less: Paid to Date	11,570,978.71	4,856,155.54	468,566.36	2,665,898.11	509,506.20	3,070,852.50
<b>O/S @ 5/31/2020</b>	<b>231,049.63</b>	<b>181,039.81</b>	<b>0.00</b>	<b>50,009.82</b>	<b>0.00</b>	<b>0.00</b>

<b><u>2018-19 FY</u></b>	<b>Total</b>	<b>General</b>	<b>Building</b>	<b>BBF (34)</b>	<b>BBF (35)</b>	<b>Sinking (41)</b>
<b>O/S @ 7-01-19</b>	72,447.21	67,260.66	1,703.53	3,483.02	0.00	0.00
Issued to Date	27,572.47	15,158.55	12,413.92	0.00	0.00	0.00
Less: Paid to Date	96,084.57	82,009.12	14,075.45	0.00	0.00	0.00
<b>O/S @ 5/31/2020</b>	<b>3,935.11</b>	<b>410.09</b>	<b>42.00</b>	<b>3,483.02</b>	<b>0.00</b>	<b>0.00</b>

<b><u>All Years</u></b>	<b>Total</b>	<b>General</b>	<b>Building</b>	<b>BBF (34)</b>	<b>BBF (35)</b>	<b>Sinking (41)</b>
<b>O/S @ 7-01-19</b>	72,447.21	67,260.66	1,703.53	3,483.02	0.00	0.00
Issued to Date	11,829,600.81	5,052,353.90	480,980.28	2,715,907.93	0.00	3,070,852.50
Less: Paid to Date	11,667,063.28	4,938,164.66	482,641.81	2,665,898.11	0.00	3,070,852.50
<b>O/S @ 5/31/2020</b>	<b>234,984.74</b>	<b>181,449.90</b>	<b>42.00</b>	<b>53,492.84</b>	<b>0.00</b>	<b>0.00</b>

**Oakdale Public Schools  
Bank Summary  
General Fund  
2019-20 FY**

<u>Month</u>	<u>Beginning Balance</u>	<u>Deposits</u>	<u>Transfers In</u>	<u>Transfers Out</u>	<u>Disbursements</u>	<u>Ending Balance</u>
<b>7-2019</b>	5,777,278.71	618,226.43		GW 227.24 SC 35.00 RC 57.50	651,008.19	5,744,177.21
<b>8</b>	5,744,177.21	106,741.67		GW 383.41 SC 35.00	541,774.83	5,308,725.64
<b>9</b>	5,308,725.64	96,019.98		GW 661.93 SC 35.00	1,146,100.90	4,257,947.79
<b>10</b>	4,257,947.79	92,999.98		GW 517.49 SC 35.00 BE 0.02	1,122,749.75	3,227,645.51
<b>11</b>	3,227,645.51	546,938.06		GW 472.30 SC 35.00	941,904.52	2,832,171.75
<b>12</b>	2,832,171.75	2,064,447.44		GW 532.13 SC 35.00 BE 15.00	714,355.92	4,181,681.14
<b>1-2020</b>	4,181,681.14	3,593,339.03		GW 356.61 SC 35.00 15.00 BC 0.02 BC	726,335.97	7,048,307.61
<b>2</b>	7,048,307.61	139,192.58		GW 817.46 SC 35.00 RC 100.00	750,172.26	6,436,375.47
<b>3</b>	6,436,375.47	757,089.27		GW 390.08 SC 35.00	621,490.46	6,571,549.20
<b>4</b>	6,571,549.20	748,810.57		GW 226.44 SC 35.00	494,225.22	6,825,873.11
<b>5</b>	6,825,873.11	246,454.40		GW 277.65 SC 35.00 BE 0.07	2,458,436.80	4,613,577.99
<b>6</b>						4,613,577.99
<b>Total</b>	<u>5,777,278.71</u>	<u>9,010,259.41</u>	<u>15.02</u>	<u>5,420.33</u>	<u>10,168,554.82</u>	<u>4,613,577.99</u>

RC = Returned checks

SC = Bank service charges-ACH

SC1 = Reversed Bank Service Charge-ACH

GW = Gateway and Credit Card Processing

HL = Heartland Processing

## BOND PRINCIPAL AND INTEREST SCHEDULE 5/31/2020

### BUILDING BOND, SERIES B JULY 1, 2015 - \$4,520,000.00

Date	Principal	Interest	Total	Date Paid	Notes
7/1/2015	\$ -	\$ -	\$ -		
1/1/2016	\$ -	\$ -	\$ -		
7/1/2016	\$ -	\$ -	\$ -		
1/1/2017	\$ -	\$ -	\$ -		
7/1/2017	\$ 110,000.00	\$ 107,600.00	\$ 217,600.00	7/3/2017	
1/1/2018	\$ -	\$ 26,460.00	\$ 26,460.00	12/22/2017	
7/1/2018	\$ 1,470,000.00	\$ 26,460.00	\$ 1,496,460.00	7/1/2018	
1/1/2019	\$ -	\$ 18,742.50	\$ 18,742.50	12/28/2018	
7/1/2019	\$ 1,470,000.00	\$ 18,742.50	\$ 1,488,742.50	7/1/2019	
1/1/2020	\$ -	\$ 9,922.50	\$ 9,922.50	12/23/2019	
7/1/2020	\$ 1,470,000.00	\$ 9,922.50	\$ 1,479,922.50		RETIREES BOND

### BUILDING BONDS of 2015 NOVEMBER 1, 2015 - \$1,100,000.00

Date	Principal	Interest	Total	Date Paid	Notes
11/1/2015	\$ -	\$ -	\$ -		
5/1/2016	\$ -	\$ -	\$ -		
11/1/2016	\$ -	\$ -	\$ -		
5/1/2017	\$ -	\$ 18,825.00	\$ 18,825.00	4/24/2017	
11/1/2017	\$ 170,000.00	\$ 6,275.00	\$ 176,275.00	10/26/2017	
5/1/2018	\$ -	\$ 5,425.00	\$ 5,425.00	4/25/2018	
11/1/2018	\$ 310,000.00	\$ 5,425.00	\$ 315,425.00	10/30/2018	
5/1/2019	\$ -	\$ 3,875.00	\$ 3,875.00	4/26/2019	
11/1/2019	\$ 310,000.00	\$ 3,875.00	\$ 313,875.00	10/29/2019	
5/1/2020	\$ -	\$ 1,937.50	\$ 1,937.50	4/22/2020	
11/1/2020	\$ 310,000.00	\$ 1,937.50	\$ 311,937.50		RETIREES BOND

### BUILDING BONDS of 2018 JUNE 1, 2018 - \$4,735,000.00

Date	Principal	Interest	Total	Date Paid	Notes
6/1/2019	\$ -	\$ 121,375.00	\$ 121,375.00	5/30/2019	
12/1/2019	\$ -	\$ 60,687.50	\$ 60,687.50	11/22/2019	
6/1/2020	\$ 1,135,000.00	\$ 60,687.50	\$ 1,195,687.50	5/28/2020	
12/1/2020	\$ -	\$ 46,500.00	\$ 46,500.00		
6/1/2021	\$ 1,200,000.00	\$ 46,500.00	\$ 1,246,500.00		
12/1/2021	\$ -	\$ 31,500.00	\$ 31,500.00		
6/1/2022	\$ 1,200,000.00	\$ 31,500.00	\$ 1,231,500.00		
12/1/2022	\$ -	\$ 15,750.00	\$ 15,750.00		
6/1/2023	\$ 1,200,000.00	\$ 15,750.00	\$ 1,215,750.00		RETIREES BOND

### TRANSPORTATION BONDS JULY 2, 2019 - \$600,000

Date	Principal	Interest	Total	Date Paid	Notes
7/1/2021	\$ 600,000.00	\$ 24,000.00	\$ 624,000.00		RETIREES BOND

**Title I Project 511**

IDC 0.00%		5/31/2020									
Project 511 Budget	3/31/2020	Claims									
Function/Object	BUDGET	7/1-10/31	11/1-12/31	1/1-1/31	2/1-3/31	4/1-4/30	5/1-5/31	Remaining	\$ Claimed	% Claimed	
1000/100	\$37,310.00	\$ 3,576.56	\$ 7,153.12	\$ 3,576.56	\$ 7,153.12	\$ 3,576.56	\$ 12,517.89	-\$243.81	\$ 37,553.81	100.65%	
1000/200	\$8,498.30	\$ 1,145.88	\$ 2,291.76	\$ 1,144.50	\$ 2,289.00	\$ 1,144.50	\$ 703.85	-\$221.19	\$ 8,719.49	102.60%	
2199/600	\$465.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$465.00	\$ -	0.00%	
<b>TOTAL</b>	<b>\$46,273.30</b>	<b>\$ 4,722.44</b>	<b>\$ 9,444.88</b>	<b>\$ 4,721.06</b>	<b>\$ 9,442.12</b>	<b>\$ 4,721.06</b>	<b>\$ 13,221.74</b>	<b>\$0.00</b>	<b>\$ 46,273.30</b>	<b>100.00%</b>	

PAYMENT FUNDING SOURCE	PAID	PAID	PAID	PAID	PAID	PAID	TOTAL
	11/27/2019	1/16/20	2/20/20	4/23/20	5/21/20	PENDING	PAID
<b>PROJECT 511</b>	\$ -	\$ -	\$ -	\$ 8.16	\$ 4,581.12	\$ -	<b>\$ 13,221.74</b>
<b>PROJECT 541</b>	\$ 4,722.44	\$ 8,525.31	\$ -	\$ 214.53	\$ -	\$ -	<b>\$ 13,462.28</b>
<b>PROJECT 552</b>	\$ -	\$ 919.57	\$ 4,721.06	\$ 9,219.43	\$ 139.94	\$ -	<b>\$ 15,000.00</b>
<b>TOTAL PAYMENT</b>	<b>\$ 4,722.44</b>	<b>\$ 9,444.88</b>	<b>\$ 4,721.06</b>	<b>\$ 9,442.12</b>	<b>\$ 4,721.06</b>	<b>\$ 13,221.74</b>	<b>\$ 46,273.30</b>

Remaining Monthly Balance \$ 41,550.86 \$ 32,105.98 \$ 27,384.92 \$ 17,942.80 \$ 13,221.74

**IDEA Flow Through Project 621**

IDC 2.07%		5/31/2020									
Project 621 Budget	BUDGET	Claims									
Function/Object	BUDGET	7/1-10/31	11/1-12/31	1/1-1/31	2/1-3/31	4/1-4/30	5/1-5/31	Remaining	\$ Claimed	% Claimed	
1000/100	\$ 58,835.00	\$ 11,151.18	\$ 9,545.88	\$ 4,460.44	\$ 11,954.92	\$ 5,977.46	\$ 14,698.78	\$ 1,046.34	\$ 57,788.66	98.22%	
1000/200	\$ 12,460.00	\$ 2,551.14	\$ 2,251.30	\$ 1,020.22	\$ 2,301.64	\$ 1,150.78	\$ 3,150.40	\$ 34.52	\$ 12,425.48	99.72%	
2140/300	\$ 1,000.00	\$ -	\$ -	\$ 325.00	\$ 400.00	\$ 500.00	\$ -	\$ (225.00)	\$ 1,225.00	122.50%	
2150/100	\$ 16,000.00	\$ 3,391.58	\$ 3,338.24	\$ 1,356.62	\$ 2,713.24	\$ 1,344.98	\$ 4,748.08	\$ (892.74)	\$ 16,892.74	105.58%	
2150/200	\$ 5,120.00	\$ 1,038.72	\$ 1,041.44	\$ 415.06	\$ 830.12	\$ 426.81	\$ 1,458.98	\$ (91.13)	\$ 5,211.13	101.78%	
2170/100	\$ 4,573.00	\$ -	\$ -	\$ 481.80	\$ 3,520.55	\$ 880.00	\$ -	\$ (309.35)	\$ 4,882.35	106.76%	
2170/200	\$ 490.36	\$ -	\$ -	\$ 36.86	\$ 269.32	\$ 67.32	\$ -	\$ 116.86	\$ 373.50	76.17%	
5400/970	\$ 2,038.50	\$ 375.00	\$ 325.00	\$ 176.00	\$ 450.00	\$ 210.00	\$ 182.00	\$ 320.50	\$ 1,718.00	84.28%	
<b>TOTAL</b>	<b>\$ 100,516.86</b>	<b>\$ 18,507.62</b>	<b>\$ 16,501.86</b>	<b>\$ 8,272.00</b>	<b>\$ 22,439.79</b>	<b>\$ 10,557.35</b>	<b>\$ 24,238.24</b>	<b>\$ -</b>	<b>\$ 100,516.86</b>	<b>100.00%</b>	

PAYMENT FUNDING SOURCE	PAID	PAID	PAID	PAID	PAID	PAID
	11/21/2019	1/9/2020	4/30/20	4/30/20	5/14/20	PENDING
<b>PROJECT 621</b>	<b>\$ 18,507.62</b>	<b>\$ 16,501.86</b>	<b>\$ 8,272.00</b>	<b>\$ 22,439.79</b>	<b>\$ 10,557.35</b>	<b>\$ 24,238.24</b>

Remaining Monthly Balance \$ 82,009.24 \$ 65,507.38 \$ 57,235.38 \$ 34,795.59 \$ 24,238.24 \$ -

**IDEA Preschool Funds Project 641**

IDC 0.00%									5/31/2020		
Project 641 Budget	BUDGET	Claims						Remaining	\$ Claimed	% Claimed	
Function/Object		7/1-11/30									
2170/300	\$ 1,765.11	\$ 1,765.11						\$ -	\$1,765.11	100.00%	
<b>TOTAL</b>	<b>\$ 1,765.11</b>	<b>\$ 1,765.11</b>						<b>\$ -</b>	<b>\$1,765.11</b>	<b>100.00%</b>	

	PAID
<b>PAYMENT FUNDING SOURCE</b>	1/16/2020
<b>PROJECT 641</b>	<u>\$ 1,765.11</u>

Remaining Monthly Balance \$ -

**IDEA High Needs Tier 2 Project 627**

IDC 0.004%								5/31/2020		
Project 627 Budget	BUDGET	Claims						Remaining	\$ Claimed	% Claimed
Function/Object		7/1-10/31	11-1-12/31	1/1-1/31	2/1-3/31	4/1-4/30	5/1-5/31			
1000/100	\$ 38,900.00	\$ 8,104.20	\$ 8,292.55	\$ 5,610.06	\$ 6,483.36	\$ 3,241.68	\$ 6,695.75	\$ 472.40	\$ 38,427.60	98.79%
1000/200	\$ 1,900.00	\$ 651.08	\$ 943.79	\$ 777.53	\$ -	\$ -	\$ -	\$ (472.40)	\$ 2,372.40	124.86%
5400/970	\$ 197.93	\$ -	\$ -	\$ 118.00	\$ -	\$ -	\$ 79.93	\$ -	\$ 197.93	100.00%
<b>TOTAL</b>	<b>\$ 40,997.93</b>	<b>\$ 8,755.28</b>	<b>\$ 9,236.34</b>	<b>\$ 6,505.59</b>	<b>\$ 6,483.36</b>	<b>\$ 3,241.68</b>	<b>\$ 6,775.68</b>	<b>\$ -</b>	<b>\$ 40,997.93</b>	<b>100.00%</b>

	PAID	PAID	PAID	PAID	PAID	PAID
<b>PAYMENT FUNDING SOURCE</b>	11/21/2019	1/16/2020	2/20/20	4/16/20	5/14/20	PENDING
<b>PROJECT 627</b>	<u>\$ 8,755.28</u>	<u>\$ 9,236.34</u>	<u>\$ 6,505.59</u>	<u>\$ 6,483.36</u>	<u>\$ 3,241.68</u>	<u>\$ 6,775.68</u>

Remaining Monthly Balance \$ 32,242.65 \$ 23,006.31 \$ 16,500.72 \$ 10,017.36 \$ 6,775.68 \$ -

**IDEA SPED ED PD District**

IDC0.00%								5/31/2020		
Project 615 Budget	BUDGET	Claims						Remaining	\$ Claimed	% Claimed
Function/Object		7/1-12/31								
2213/600	\$ 1,428.13	\$ 560.00						\$ 868.13	\$ 560.00	39.21%
<b>TOTAL</b>	<b>\$ 1,428.13</b>	<b>\$ 560.00</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 868.13</b>	<b>\$ 560.00</b>	<b>39.21%</b>

	PAID
<b>PAYMENT FUNDING SOURCE</b>	2/13/2020
<b>PROJECT 615</b>	<u>\$ 560.00</u>

Remaining Monthly Balance \$ 868.13 \$ 868.13 \$ 868.13 \$ 868.13 \$ 868.13 \$ 868.13

## Payment Register

Options: Year: 2019-2020, Fund: ACTIVITY FUND, Date Range: 5/1/2020 - 5/31/2020, Print Payroll Payments: False

Payment No	Date	Vendor No	Vendor	Type	Date Voided	Void Amount	Amount
378	05/11/2020	3693	PROSPERITY BANK				\$65.20
379	05/20/2020	4262	BASICS PLUS, INC				\$384.00
380	05/20/2020	3889	TYLER HEFFLEY				\$42.00
381	05/20/2020	119	SAM'S WHOLESALE CLUB				\$115.16
382	05/28/2020	50159	Alicia Evans				\$35.00
383	05/28/2020	50167	Amy Reed				\$125.00
384	05/28/2020	50163	Anita Lutonsky				\$85.00
385	05/28/2020	50144	Ashley Boyette				\$210.00
386	05/28/2020	50161	Ashley Schurr				\$300.00
387	05/28/2020	50164	Brett Willis				\$140.00
388	05/28/2020	50174	Brianna Ridpath				\$120.00
389	05/28/2020	50168	Cheryl Stone				\$175.00
390	05/28/2020	50155	Dana Sheehan				\$300.00
391	05/28/2020	50157	Debbie Labrie				\$90.00
392	05/28/2020	50142	Erin Coleman				\$50.00
393	05/28/2020	50158	Jenni McKeown				\$50.00
394	05/28/2020	50169	Jennifer Colby				\$50.00
395	05/28/2020	50153	Jessey Soo				\$90.00
396	05/28/2020	50170	Jessica Sanders				\$70.00
397	05/28/2020	50165	Kerri Adler				\$125.00
398	05/28/2020	50156	Laura Neff				\$35.00
399	05/28/2020	50166	Lyndsey Pullen				\$35.00
400	05/28/2020	50171	Marissa Diller				\$90.00
401	05/28/2020	50172	Mista Burgess				\$300.00
402	05/28/2020	50176	Nicole Parrott				\$100.00
403	05/28/2020	50177	Ryan Parrott				\$90.00
404	05/28/2020	50162	Shannon Kardokus				\$35.00
405	05/28/2020	50160	Sheila Manzelli				\$105.00
406	05/28/2020	50173	Shelby Carter				\$35.00
407	05/28/2020	50175	Stacy Hensley				\$90.00
408	05/28/2020	50178	Summer Lashley				\$35.00
409	05/28/2020	50179	Tempe Knopp				\$95.00
410	05/28/2020	50154	Trica Keyser				\$125.00
411	05/28/2020	50180	Wendy Pollard				\$120.00
<b>Non-Payroll Total:</b>							<b>\$3,911.36</b>
<b>Payroll Total:</b>							<b>\$0.00</b>
<b>Balance Foward:</b>							<b>\$123,087.54</b>
<b>Total:</b>							<b>\$126,998.90</b>

## Payment Register

**Options:** Year: 2019-2020, Fund: BOND FUND #34, Date Range: 6/5/2020 - 6/5/2020, Print Payroll Payments: False

Payment No	Date	Vendor No	Vendor	Type	Date Voided	Void Amount	Amount
161	06/05/2020	3693	PROSPERITY BANK				\$665.67
<b>Non-Payroll Total:</b>							<b>\$665.67</b>
<b>Payroll Total:</b>							<b>\$0.00</b>
<b>Balance Foward:</b>							<b>\$2,329,313.94</b>
<b>Total:</b>							<b>\$2,329,979.61</b>

## Payment Register

Options: Year: 2019-2020, Fund: Building, Date Range: 6/5/2020 - 6/9/2020, Print Payroll Payments: False

Payment No	Date	Vendor No	Vendor	Type	Date Voided	Void Amount	Amount
551	06/05/2020	49	ALERT 360				\$1,849.95
552	06/05/2020	681	CIRCLE SAW SHOP, INC.				\$121.91
553	06/05/2020	4263	EQUIPMENT SHARE				\$563.22
554	06/05/2020	3823	FER WASTE SERVICES LLC				\$352.00
555	06/05/2020	4000	GREENTURF INC				\$1,239.35
556	06/05/2020	3446	HD SUPPLY FACILITIES				\$893.68
557	06/05/2020	4115	LAMPTON WELDING SUPPLY				\$74.95
558	06/05/2020	62	LOCKE SUPPLY CO.				\$420.22
559	06/05/2020	4030	MOTHER NATURES PEST				\$550.00
560	06/05/2020	3	OKLAHOMA GAS& ELECTRIC				\$3,867.79
561	06/05/2020	4	OKLAHOMA NATURAL GAS				\$292.87
562	06/05/2020	1061	SHERWIN WILLIAMS PAINT CO.				\$749.40
563	06/05/2020	1086	TRACTOR SUPPLY				\$66.94
564	06/05/2020	3148	TREATS SOLUTIONS				\$1,725.67
565	06/08/2020	3362	FIRE EXTINGUISHER SALES & SER				\$1,533.00
566	06/09/2020	70038	CITY OF OKLAHOMA CITY				\$415.48
567	06/09/2020	494	THE HOME DEPOT				\$1,025.23
568	06/09/2020	503	LOWE'S				\$382.19
569	06/09/2020	3333	WINDSTREAM NUVOX, LLC				\$45.86
<b>Non-Payroll Total:</b>							<b>\$16,169.71</b>
<b>Payroll Total:</b>							<b>\$0.00</b>
<b>Balance Foward:</b>							<b>\$477,990.24</b>
<b>Total:</b>							<b>\$494,159.95</b>

## Payment Register

Options: Year: 2019-2020, Fund: GEN FUND-FOR OP, Date Range: 6/5/2020 - 6/9/2020, Print Payroll Payments: False

Payment No	Date	Vendor No	Vendor	Type	Date Voided	Void Amount	Amount
2808	06/05/2020	58	AT&T MOBILITY				\$223.97
2809	06/05/2020	3795	EARTHGRAINS BAKING				\$105.00
2810	06/05/2020	3488	BUDDY'S PRODUCE, INC.				\$332.50
2811	06/05/2020	3709	EDMOND MUSIC				\$928.99
2812	06/05/2020	3567	HOBBY LOBBY DEPARTMENT				\$85.12
2813	06/05/2020	5	MUNICIPAL ACCOUNTING SYSTE				\$283.00
2814	06/05/2020	3548	MTM RECOGNITION CORPORATI				\$442.50
2815	06/05/2020	4042	DEAN FOODS COMPANY				\$347.88
2816	06/05/2020	941	OKLAHOMA TURNPIKE AUTHORI				\$0.55
2817	06/05/2020	3693	PROSPERITY BANK				\$895.11
2818	06/05/2020	376	PUTNAM COMPANY				\$5,300.00
2819	06/05/2020	649	RAINBOW PENNANT, INC.				\$105.00
2820	06/05/2020	3394	STATION 27, INC				\$304.76
2821	06/05/2020	997	UMB BANK				\$300.00
2822	06/09/2020	3387	ED ADMIN SRVS, INC				\$5,250.00
2823	06/09/2020	119	SAM'S WHOLESALE CLUB				\$33.64
<b>Non-Payroll Total:</b>							<b>\$14,938.02</b>
<b>Payroll Total:</b>							<b>\$0.00</b>
<b>Balance Foward:</b>							<b>\$5,061,543.22</b>
<b>Total:</b>							<b>\$5,076,481.24</b>



**Important Messages**

THANK YOU FOR CHOOSING PROSPERITY BANK FOR YOUR CREDIT CARD NEEDS.

Office: 748.22  
 Classroom: 41.42  
 Foundation: 837.95  
 Bond 34 665.67 Technology: 105.47

**TRANSACTIONS THIS BILLING PERIOD**

Transaction Date	Posting Date	Reference Number	Transaction Description	\$ Amount
TRANSACTIONS				
Account Level				
05/19	05/19	00000000000519000110022	PAYMENT - THANK YOU!	\$537.81-
05/19	05/19	00000000000519000110030	PAYMENT - THANK YOU!	\$65.20-
05/19	05/19	00000000000519000110048	PAYMENT - THANK YOU!	\$225.00-
<b>Card #2167-MARLENE MARTINEZ</b>				
<b>Card #3667-MARLENE MARTINEZ</b>				
03/31	05/22	VT201432567000010000232	FRAUD/CHGBK - FAVOR CUSTOMER	\$875.00-
05/06	05/07	VT201282567000010000104	AMZN Mktp US*VU8XN25N3 Amzn.com/bill WA	\$9.49+
05/06	05/07	VT201282567000010000966	BEDFORD CAMERA AND VID OKLAHOMA CITY OK	\$837.95+
05/10	05/10	VT201313304000010000802	AMZN Mktp US Amzn.com/bill WA	\$9.49-
05/11	05/12	VT201332567000010001480	AMZN MKTP US*6Y3GA0ZV3 AMZN.COM/BILL WA	\$9.49+
<b>Total For MARLENE MARTINEZ</b>				<b>\$27.56-</b>
<b>Card #3741-JOSEPH PIERCE</b>				
05/05	05/06	VT201272568000010000522	GIANT TV WWW.GIANT.TV NM	\$19.96+
05/12	05/13	VT201342567000010002040	AMAZON.COM*9K0W442U3 A AMZN.COM/BILL WA	\$25.43+
05/17	05/17	VT201383306000010001632	AMAZON.COM*MC44B4752 A AMZN.COM/BILL WA	\$179.89+
05/18	05/19	VT201402567000010000936	MICROSOFT#G001344104 MSBILL.INFO WA	\$23.87+
05/20	05/21	VT201422567000010001927	AMZN MKTP US*M74T170V1 AMZN.COM/BILL WA	\$46.28+
05/21	05/21	VT201422567000010002634	AMAZON.COM*M74TQ3PP1 A AMZN.COM/BILL WA	\$15.59+
05/21	05/22	VT201432567000010001675	AMZN MKTP US*M77Q96PX1 AMZN.COM/BILL WA	\$23.99+
05/21	05/22	VT201432567000010001880	AMAZON.COM*M70ZH83L2 A AMZN.COM/BILL WA	\$48.72+
05/22	05/24	VT201452567000010000839	TIME CLOCK WIZARD INC 866-208-7618 NY	\$179.40+
05/27	05/28	VT201492567000010000136	Amazon.com*M78L71230 Amzn.com/bill WA	\$19.90+
05/27	05/28	VT201492567000010000179	AMZN Mktp US*M77LC72U0 Amzn.com/bill WA	\$245.99+
05/27	05/28	VT201492567000010001620	AMAZON.COM*M75D67161 A AMZN.COM/BILL WA	\$60.49+
05/28	05/28	VT201492567000010001103	AMZN Mktp US*M775A87Q0 Amzn.com/bill WA	\$15.99+
05/29	05/31	VT201522567000010000093	AMZN Mktp US*M71ZQ4D02 Amzn.com/bill WA	\$179.98+
05/29	05/31	VT201522567000010000608	AMZN Mktp US*M72Y78SW2 Amzn.com/bill WA	\$212.20+
05/30	05/31	VT201522567000010001063	AMZN Mktp US*MY42X7421 Amzn.com/bill WA	\$13.91+
<b>Total For JOSEPH PIERCE</b>				<b>\$1,311.59+</b>
<b>Card #4392-MARLENE MARTINEZ</b>				
05/28	05/29	VT201502567000010000502	AMZN Mktp US*M74PM7YV1 Amzn.com/bill WA	\$239.70+
<b>Total For MARLENE MARTINEZ</b>				<b>\$239.70+</b>

2020 Total Year-to-Date	
Total fees charged in 2020	\$0.00
Total interest charged in 2020	\$0.00

# Oakdale Public School

## Revenue/Expenditure Summary

**Options:** Fund: 61, Date Range: 7/1/2019 - 6/30/2020

	<b>Begin Balance</b>	<b>Receipts</b>	<b>Adjusting Entries</b>	<b>Payments</b>	<b>Cash End Balance</b>	<b>Unpaid POs</b>	<b>End Balance</b>
801 SPORTS	\$0.00	\$35,332.54	\$19,219.08	\$33,697.41	\$20,854.21	\$0.00	\$20,854.21
810 CHEER	\$0.00	\$4,764.43	\$671.96	\$5,353.42	\$82.97	\$0.00	\$82.97
831 CONCESSIONS	\$0.00	\$9,155.50	\$8,330.41	\$6,049.77	\$11,436.14	\$0.00	\$11,436.14
901 CLASS PROJECTS	\$0.00	\$10,578.16	\$60.36	\$9,859.96	\$778.56	\$0.00	\$778.56
930 DAYCARE	\$0.00	\$41,625.49	\$1,458.31	\$41,700.51	\$1,383.29	\$0.00	\$1,383.29
940 BOX TOPS/TARGET	\$0.00	\$712.00	\$1,558.23	\$779.28	\$1,490.95	\$0.00	\$1,490.95
950 BAND - STUDENTS	\$0.00	\$9,241.00	\$3,756.80	\$7,493.71	\$5,504.09	\$0.00	\$5,504.09
960 STEM PROGRAM	\$0.00	\$1,280.00	\$851.69	\$383.66	\$1,748.03	\$0.00	\$1,748.03
970 WILLHOITE GRANT	\$0.00	\$0.00	\$743.75	\$743.75	\$0.00	\$0.00	\$0.00
980 YEARBOOK	\$0.00	\$0.00	\$2,069.56	\$57.38	\$2,012.18	\$0.00	\$2,012.18
988 ADMINISTRATION	\$0.00	\$3,574.23	\$5,559.96	\$4,817.31	\$4,316.88	\$0.00	\$4,316.88
990 LIBRARY	\$0.00	\$11,728.19	\$6,970.64	\$7,336.70	\$11,362.13	\$0.00	\$11,362.13
991 BUILDERS CLUB	\$0.00	\$3,758.65	\$2,778.37	\$2,596.80	\$3,940.22	\$0.00	\$3,940.22
992 LEADERSHIP	\$0.00	\$6,065.49	\$1,652.00	\$6,266.12	\$1,451.37	\$0.00	\$1,451.37
995 ART CLASS	\$0.00	\$0.00	\$323.30	\$41.52	\$281.78	\$0.00	\$281.78
<b>Total</b>	<b>\$0.00</b>	<b>\$137,815.68</b>	<b>\$56,004.42</b>	<b>\$127,177.30</b>	<b>\$66,642.80</b>	<b>\$0.00</b>	<b>\$66,642.80</b>

**June 2020 Surplus:**



Lesco Reel Mower (SN# 3GF3067)



Big Dog Mower (SN# 10012054)



Acer Chromebook 13 600/800 series (142 total)



IHP Chromebook 11 G5 EE 700 series (76 total)



Metal File Cabinets (3 total)



Wood Doors (9 total)



Bar Stools/Chairs (40 total)



# OSAG

## Oklahoma School Assurance Group

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May 26, 2020

Oakdale School District  
Mr. Kim Lanier  
10901 North Sooner Road  
Edmond, OK 73013

Dear Mr. Lanier & Board of Education:

Your 2020-2021 workers' compensation premium quote from the Oklahoma School Assurance Group (OSAG) is enclosed.

***The well-being of our district members & district employees is our top priority, and we recognize financial challenges that our districts have faced during the COVID-19 pandemic. As part of your 2020-2021 renewal premium, a Financial Relief Benefit Credit has been applied.***

**It is important to review the proposal completely, to familiarize with potential FUTURE MONETARY BENEFITS for your district!** Several important documents are enclosed for your benefit. Don't hesitate to call our office for assistance with questions about your OSAG quote.

OSAG is the largest provider of workers' compensation services to Oklahoma public schools, proudly saving our members over \$98,727,624 since we began in 1994. Our motto is to provide *"the most efficient and economical workers' compensation services to Oklahoma public school districts"*. We strive to uphold this motto, and look forward to welcoming Oakdale School District as a member of the OSAG program.

***If your district has been provided an attractive quote from another carrier, and you are considering removing your OSAG membership, please call our office to discuss your options.***

We look forward to your OSAG membership in our 2020-2021 policy year. Please call us at 800-699-5905 to discuss your quote material.

Sincerely,

Tina J. Wamsley, Secretary  
Oklahoma School Assurance Group

TJW/vml  
enclosure

P.O. Box 18858, Oklahoma City, OK 73154  
Phone: 800-699-5905 Facsimile: 405-842-0051  
[www.okschoolassurancegroup.org](http://www.okschoolassurancegroup.org)



## Oklahoma School Assurance Group

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Oakdale School District  
Attn: Mr. Kim Lanier  
10901 North Sooner Road  
Edmond, OK 73013

May 22, 2020

### Re: 2020-2021 OSAG Workers' Compensation Insurance Quote

Dear Mr. Lanier,

Thank you for helping to make OSAG the largest provider of workers' compensation to public schools in Oklahoma. Your 2020-2021 OSAG renewal quote is as follows:

2020-2021 OSAG Premium <i>BEFORE</i> Discounts:	\$20,127
Financial Relief Benefit for 2020-21:	\$2,600
<b>Total 2020-2021 OSAG Workers' Compensation Renewal Premium Minus Awards/Credits:</b>	<b><u>\$17,527</u></b>

*\*Your OSAG policy also contains Employers' Liability Limits of \$1,000,000/\$1,000,000/\$1,000,000*

Active membership in the Oklahoma School Assurance Group provides an array of benefits for your district, including continued membership *performance dividend awards*. The following example reflects the current and potential dividend awards for Oakdale School District if membership remains active, and district loss records qualify:

<i>2021-2022 Estimated Financial Relief Benefit</i>	<i>\$1,170</i>
<i>2021-2022 Possible Membership Dividend</i>	<i>\$3,283</i>
2022-2023 Possible Membership Dividend	\$3,495
2023-2024 Possible Membership Dividend	\$2,790
<b>Total Possible Future Membership Dividend:</b>	<b><u>\$10,738</u></b>

### About the OSAG Proposal:

**\*OSAG is a group policy, therefore Experience Modification Factors are not applicable for our school district members.**

\*The Membership Dividend is the maximum amount that may be awarded to an active member as a performance dividend. This figure is based on individual district loss performance.

\*All members that renew with OSAG have a *Membership Dividend* associated with active membership. ***In order to receive the Membership Dividend, a member must be active with paid premium for the 2020-2021 policy year.***

***\*\*CompSource Mutual has declared a \$60,000,000 dividend to be paid out to the benefit of policyholders with the potential of OSAG members receiving significant benefits for their membership in OSAG. This dividend would provide OSAG members record benefits and premium savings/reductions for each individual member. School district members would receive award amounts in addition to the Membership Dividend listed above.***

P.O. Box 18858, Oklahoma City, Oklahoma 73154  
Ph: 800-699-5905 Fx: 405-842-0051 [www.okschoolassurancegroup.org](http://www.okschoolassurancegroup.org)



May 27, 2020

**Board of Directors**

Terry Davidson,  
Chairman  
Finance Director:  
Comanche Schools

Dr. Joe Pierce  
Oakdale Public Schools  
10901 N. Sooner Road  
Edmond, OK 73013-8310

Rick Thomas,  
Member  
Superintendent:  
Skiatook Schools

RE: Membership Proposal Effective 7/1/2020

Dear Dr. Joe Pierce:

Dr. John Cox,  
Treasurer  
Superintendent:  
Peggs Schools

We are very pleased to provide you with the attached proposal for insurance coverages with Oklahoma Schools Insurance Group (OSIG).

Dusty Ricks,  
Secretary  
Superintendent:  
Mid America  
Technology Center

OSIG is not a conventional insurance program. We are a public entity in the state of Oklahoma formed by an Interlocal Agreement and made up of member public school districts. Our organization is non-profit, member owned, and controlled by a board of your peers. Our sole mission is to serve our member schools. Our promise is to provide quality insurance coverage and superior service at stable pricing. We are pleased that 447 school districts are members of OSIG. Our membership is strong and committed.

Brad Overton,  
Member  
Superintendent:  
Cordell Schools

OSIG's financial position is excellent. No other Oklahoma school insurance program can provide you with this security. Our organization is constantly growing, improving and looking for new ways to serve Oklahoma schools. The group purchasing power of OSIG and a non-profit structure provides competitive insurance rates even in tough financial times.

Randy Hughes,  
Member  
Superintendent:  
McAlester Schools

**Included in this proposal is information on OSIG's financial condition and summaries of enhanced coverages that only OSIG provides.**

For the 2020-2021 plan year, we are requiring the resolution to be signed by the member's Board of Education and returned to OSIG in order to bind coverage effective 07/01/2020.

Sherry Durkee  
Member  
Superintendent:  
Sand Springs Schools

Loss control, risk management services, and specialized insurance coverages included in OSIG program are:

- Enhanced Property and Liability Coverage
- Cyber Liability, Crime, Pollution, School Violent Acts Protection
- Online Training in many different areas for your school employees
- Loss Control Site Surveys / Safety Inspections
- Member Only Risk Management Library at [www.osig.org](http://www.osig.org)
- StopIt Anonymous Incident Reporting Mobile App & Web App

**Executive Director**

David Martin

If you have any questions about the insurance procurement process or this proposal, please contact your local agent or any member of the OSIG administration team. Contact names and phone numbers are included in the proposal.

Sincerely,

OSIG Program Administration

Cc: The Beckman Company



**Oakdale Public Schools**  
**10901 N. Sooner Road**  
**Edmond, OK 73013-8310**

**This is not an invoice.**

<b>Breakdown of Insurance Cost</b>
------------------------------------

Annual Premium Breakdown	
Property:	\$84,790
Boiler & Machinery:	\$621
Auto Physical Dmg:	\$1,333
General Liability:	\$4,006
Auto Liability:	\$5,343
Educators Legal:	\$4,006
Excess Liability:	\$0
<b>Total Annual:</b>	<b>\$100,099</b>

A 25% minimum earned premium applies.

Your historical billed premiums, total insured values and loss information are shown in the charts below.

Year	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020
Total Values	\$31,875,701	\$32,290,557	\$33,249,190	\$38,707,707	\$39,629,876	\$44,072,921
Premium	\$61,966	\$59,162	\$58,405	\$69,080	\$72,790	\$89,137
Distribution	\$0	\$0	\$2,533	\$0	\$0	\$3,292

Number of Claims:	Insurance Cost Paid to OSIG (incl Endts):	Incurred Claims:	Loss Ratio:
2	\$402,232	\$27,000	6.71%

Your losses are considered in the calculation of the cost of your insurance. Your dedication to maintaining your property and providing safe campuses for your students and community will result in savings in the cost of your insurance.

### Payment Terms

Payment of the insurance cost is due the effective date of your coverage. **A copy of your purchase order encumbering funds for payment of your insurance should be provided to OSIG as soon as available.** A three (3) payment plan option is available.

- Installment #1 1/3 of total due 7/1/20
- Installment #2 1/3 of total due 8/1/20
- Installment #3 1/3 of total due 9/1/20

P. O. Box 3068  
 Tulsa, OK 74101-3068  
 Phone 918-764-1686 ▪ Toll Free 866-444-0061

## Coverages

OSIG provides a full range of property and liability coverages with the exception of workers compensation. Crime and Cyber Liability coverages are included in pool limits.

### Property

- Full Replacement Cost - Except Roofs over 15 years old and Autos, Contractors Equipment & Debris Removal Only adjusted at ACV
- No Coinsurance Clause
- No Cosmetic Damage Only Exclusion
- Real And Personal Property- Limit Per Occurrence \$500,000,000
- Building - 125% of scheduled limits per statement of value
- Business Personal Property - blanket coverage per statement of values  
including:
  - Electronic Data Processing Equipment, and Media
  - Accounts Receivable
  - Valuable Papers
  - Fine Arts
  - Miscellaneous Property
  - Miscellaneous Unnamed / Undescribed Property
  - Builder's Risk
    - \*Note All Builder's Risk projects must be reported to OSIG - Frame projects are subject to approval
  - Outdoor Property - covered all perils
  - Extra Expense
  - Business Income including Rental Income and Tuition Income
  - Ordinance or Law including Increased Cost of Construction and Demolition
  - Contractor's Equipment Coverage
  - Debris Removal Coverage
  - Covered Property In Transit
  - Personal Property of Others/Officers/Employees
  - Off Premises Services Interruption including Extra Expense
  - Vehicle Damage
  - Terrorism
- Newly Acquired Property Coverage - 90 days \$25,000,000
- Earthquake, Volcanic Eruption- Aggregate Any One Policy Year \$10,000,000
- Flood- Aggregate Any One Policy Year \$25,000,000  
\*Note Flood Zones A and V are excluded
- Pollution Liability included
- Boiler And Machinery Coverage- Any One Occurrence \$200,000,000

Please refer to the attached property and automobile schedules for your school district's limits of insurance for Building, Contents, Extra Expense, Miscellaneous Property, EDP, Earthquake, Flood and Automobile Physical Damage coverage.

### Deductibles Optional increased deductible quotations are available upon request.

- \$25,000 Property Deductible Per Occurrence
- \$25,000 Property Deductible Per Occurrence- Windstorm / Hail
- \$1,000 Boiler / Machinery Deductible per Occurrence
- \$50,000 Flood, Earthquake and Pollution

### General Liability

- \$1,000,000 Limit Per Occurrence (subject to the Governmental Tort Claims Act)
- Bodily Injury, Property Damage And Personal / Advertising Injury
- Premises / Operations And Products / Completed Operations
- Miscellaneous Medical Professional to Include School Nurses, Student Nurses, Counselors and Allied Health Programs
- Insureds Include District, Board Members, Employees, Student Teachers, And Volunteers
- No Exclusions for Corporal Punishment or Sexual Misconduct
- No Deductible
- PTA/PTO's included for coverage if funds flow through school's books.

### School Board Legal Liability

- Claims-Made Form
- \$1,000,000 Limit Per Occurrence (subject to the Governmental Tort Claims Act)
- Errors And Omissions Liability including Educational Errors And Omissions
- Employment Practices Liability
- Insureds Include District, Board Members, Employees, Student Teachers, and Volunteers
- \*Unlimited Prior Acts / No retroactive date included
- \$25,000 legal costs for IEP administrative hearings
- \$2,500 Deductible
- \*Any incidents or potential claims that have been reported to the superintendent, any associate superintendent, principal, assistant principal, personnel directors, dean or school attorney should be reported to your current carrier immediately.

### Employee Benefit Liability

- Claims Made Form
- Unlimited Prior Acts / No retroactive date included
- \*Any incidents or potential claims that have been reported to the superintendent, any associate superintendent, principal, assistant principal, personnel directors, dean or school attorney should be reported to your current carrier immediately.

### Automobile Liability

- \$1,000,000 Limit Per Occurrence (subject to the Governmental Tort Claims Act)
- Bodily Injury And Property Damage
- Includes Hired and Non-Owned Exposures
- Includes Uninsured and Underinsured Motorists (Oklahoma Minimum Limits)
- Insureds Include District, Board Members, Employees, Student Teachers, and Volunteers
- Coverage included for garage liability and garage keepers legal liability.
- \$1,000 Auto Property Damage Deductible
- No charge for vehicles added/deleted during the policy term. Vehicle changes must be reported to OSIG.

### Automobile Physical Damage

- Actual Cash Value
- \$1,000 Deductible
- Vehicle additions / deletions / changes must be reported to OSIG
- No charge for vehicles added/deleted during the policy term.
- Please refer to the attached schedule of vehicles.

### **Crime**

- \$10,000 Limit Per Occurrence / Per District
- Employee Dishonesty
- Premises Money And Securities
- Transit Money And Securities
- \$1,000 Deductible

### **Cyber Liability**

- Claims-Made Form
- Retro date - first effective date with OSIG
- Liability
  - \$2,000,000 Annual Aggregate Limit for Information Data and Network Liability
  - \$2,000,000 Annual Aggregate for Regulatory Defense and Penalties
  - \$2,000,000 Annual Aggregate for Payment Card Liability and Costs
  - \$2,000,000 Annual Aggregate for Media Liability
- First Party
  - \$2,000,000 Annual Aggregate for Cyber Extortion Loss
  - \$2,000,000 Annual Aggregate for Data Recovery Costs
  - \$2,000,000 Annual Aggregate for Business Interruption Resulting in Security Breach
  - \$500,000 Annual Aggregate for Business Interruption Resulting in System Failure
  - \$750,000 Annual Aggregate for Dependent Business Interruption Resulting in Security Breach
  - \$100,000 Annual Aggregate for Dependent Business Interruption Resulting in System Failure
- \$10,000 Deductible

### **School Violent Acts Protection**

- \$25,000 Each Occurrence Limit
- \$250,000 Aggregate Limit (all members, all claims)
- No Deductible
- \$25,000 Property/Safety Improvements following School Violent Act

Note: Per Occurrence Limits are shared limits except as otherwise indicated.

# Property Schedule

Report Printed: 05/27/2020 11:02 pm

## Oakdale Public Schools

Location	Occupied As	Bldg Value	Contents Val
10901 N. Sooner R	6 Light Poles with 2 lights each	\$26,905	\$0
10901 N. Sooner R	Bus Barn	\$320,332	\$21,598
10901 N. Sooner R	Elem. Classrooms/Library/Cafeteria/Storage	\$29,654,191	\$5,030,564
10901 N. Sooner R	Elementary Addition	\$2,449,213	\$374,614
10901 N. Sooner R	Elementary Gym	\$1,773,548	\$181,567
10901 N. Sooner R	Fencing	\$180,790	\$0
10901 N. Sooner R	Lighting @ Tennis Courts & Football Field & Perimeter Fencing	\$478,506	\$0
10901 N. Sooner R	Maintenance Barn	\$106,778	\$14,009
10901 N. Sooner R	Playground Equipment	\$179,402	\$0
10901 N. Sooner R	Storage Building	\$96,144	\$13,602
10901 N. Sooner R	Tennis Courts	\$265,386	\$0
10901 N. Sooner R	Track Surface, Goal Post, Bleachers, Scoreboard, Lights/Light Poles (4)	\$844,085	\$0
Northeast Quarter o	Vacant Land (Liability Only)	\$0	\$0
		<b><u>\$36,375,280</u></b>	<b><u>\$5,635,954</u></b>

Floater Limit	<u>\$265,000</u>	Auto Values:	<u>\$684,806</u>
EDP Limit	<u>\$250,000</u>	Total Values:	<u>\$44,211,040</u>
Extra Expense Limit	<u>\$1,000,000</u>		

# Auto Schedule

Report Printed: 05/27/2020 11:02 pm

## Oakdale Public Schools

Vehicle No	Year	Make	Model	Capacity	VIN	Actual Value
1	2016	Chevy	Bus	14	1GB3GSBG0G1294183	\$53,775
2	2016	Chevy	Bus	14	1GB3GSBG0G1295110	\$53,775
3	2019	GMC	Yukon		1GKS1FKC8KR126593	\$51,566
4	2021	Bluebird	Bus	71	1BAKGCEH0MF368258	\$88,762
5	2021	Bluebird	Bus	71	1BAKGCEH2MF368259	\$88,762
6	2021	Bluebird	Bus	71	1BAKGCEH9MF368260	\$88,762
7	2021	Bluebird	Bus	71	1BAKGCEH0MF368261	\$88,762
8	2021	Bluebird	Bus	71	1BAKGCEH2MF368262	\$88,762
9	2019	Collins	Bus w/slide out ramp	12	3C7WRCKG3JE150770	\$81,880

Total Value of All Autos for Oakdale Public Schools: **\$684,806**



## Overview

### Background

The Oklahoma Schools Insurance Group (OSIG) is a public entity of the State of Oklahoma, formed as an Interlocal Agreement in accordance with 74 O.S. 1004(f), for the purpose of joining together a group of Oklahoma public school districts. OSIG will allow member districts to more efficiently and more economically obtain and manage their insurance programs.

OSIG obtained approval to operate from the Oklahoma Attorney General on June 28, 2001. Effective July 1, 2002, OSIG began full operation by providing its member districts with broad insurance coverage through "A" rated insurance carriers and professional risk management services. Over the past 18 years, OSIG's membership has grown to 447 and the program insures more than \$16 Billion in school property across Oklahoma.

### Structure

OSIG is a **non-profit, member-owned**, public entity program whose management is completely controlled by a Board of your peers. Our singular mission is to provide quality insurance coverage and service to our members. OSIG's mission statement is

***"The mission of Oklahoma Schools Insurance Group (OSIG) is to provide quality, cost effective risk management products and services to member schools".***

The group purchases insurance and reinsurance from "A" rated carriers. OSIG's insurance providers are long term partners and committed to OSIG and Oklahoma schools.

OSIG has contracted with Arthur J. Gallagher & Company in Tulsa to administer the program. Gallagher is one of the largest insurance brokers in the world and manages programs similar to OSIG across the country.

It is important to know that the insurance coverage provided by OSIG was specifically tailored to meet the needs of Oklahoma schools. The coverage is what you need to protect your schools' property, your students, and patrons.

The strength of the liability portion of OSIG's offering is also important during these tough times. The program is backed by the foremost specialist in school liability insurance in the country. United Educators Insurance Company is second to none.

Losses are a part of life. Only OSIG has the collective strength and staying power to provide the protections you need. By sticking together as a group, OSIG will be able to continue to provide you with the quality, fair-priced insurance and risk management services you need to protect your schools' assets, your board, your staff and most importantly your children.

## Financial Strength

**OSIG is financially solid and we have the funds (cash) we need to pay your claims. OSIG has returned more than \$9 million to our members over the years as distributions. Surplus at year ended 6/30/19 was more than \$11.8 million and our assets were more than \$27 million.**

We believe in complete transparency. We submit to an annual financial audit each year end and share the operating results at our annual members meeting held each year.

The financial condition of an insurance group should be of utmost importance to you when choosing an insurance partner for your district. If your insurer can't pay their claims, then the policy is a worthless stack of paper.

<i>Statement of Net Assets</i>	
<i>As of 6/30/19</i>	
Cash	\$ 23,003,506
Other Assets	\$ 4,869,745
<b>Total Assets</b>	<b>\$ 27,873,251</b>
Notes Payable	\$ -
Other Liabilities	\$ 16,028,582
<b>Total Liabilities</b>	<b>\$ 16,028,582</b>
<b>Total Net Assets/Surplus</b>	<b>\$ 11,844,669</b>

We urge you to obtain and review audited financial statements from every insurance provider that may offer your school district a quote. Financial statements are required by law and can be obtained at [www.ok.gov/oid](http://www.ok.gov/oid). Click on Interlocals under the Quick Links section of the home page. Your school's auditor can help in analyzing the statements.



## Important Plan Information

It is important to understand that OSIG is not an insurance company, but rather a non-profit, cooperative risk management program owned and directed by Oklahoma Schools. Its mission is to reduce insurance costs and stabilize rates by aggregating purchasing power with an intense focus on controlling member losses. When losses are controlled, OSIG's member schools retain the underwriting profit and investment income thereby increasing fund reserves for future years. OSIG purchases per occurrence and liability aggregate protection for its member schools. The per occurrence insurance protects member schools up to \$500,000,000 for property losses and \$1,000,000 for liability claims in each and every occurrence. The aggregate insurance protection is purchased in the unlikely event that sum total of all OSIG losses are significantly more than actuarially projected. Additional excess liability limits are available for members requiring higher limits.

This proposal is an outline of the coverages proposed by insurers based on the information provided by your school district. It does not include all the terms, coverages, exclusions, limitations, and conditions of the actual contract language. Please refer to the plan document for the details.

## Actuarial Review

An independent actuary has been retained by OSIG to make projections as to anticipated claims and losses the program should expect on an annual basis. The OSIG actuary has relied on the historical loss experience and exposures provided to OSIG by the member school districts to make projections of OSIG's expected losses. OSIG adequately funds to, or in excess of, the expected loss projections through member contributions (insurance cost) and our own surplus.

Membership contributions are used to buy insurance, pay administrative expenses, and fund for members' claims. Similar successful programs throughout the country for schools and municipalities are protected using the same insurance structure as OSIG has deployed. As with any insurance mechanism, OSIG does not guarantee full funding in the event unimaginable losses would materialize that are many times greater than what is indicated by past history. The OSIG board is charged with developing a plan to address under funding in this unlikely event.

## Procedure to Renew Coverage

Notify your agent of your acceptance of this insurance renewal proposal. Your agent will advise the OSIG administrative staff in writing that you wish to renew the insurance coverage.

## Payment Terms

Payment of the insurance cost is due the effective date of your coverage. A copy of your purchase order encumbering funds for payment of your insurance should be provided to OSIG as soon as available. A three (3) payment plan option is available.

Installment #1	1/3 of total	due 7/1/20
Installment #2	1/3 of total	due 8/1/20
Installment #3	1/3 of total	due 9/1/20

A 25% minimum earned premium applies.

## Risk Management And Loss Control Tools

Loss Control Site Consultation

StopIt Anonymous Incident Reporting Mobile App & Web App

Risk Management focused website [www.osig.org](http://www.osig.org)

Examples of Online training:

Free of charge to all members of OSIG

Online 24/7 access to training

Training modules include:

- Promoting Child Safe Environments - two training platforms  
(Fulfills legislative mandate for child abuse awareness training)
- Workplace Harassment Prevention
- Short Term International Programs
- Teaching Science Safely
- Contracting and Risk Allocation
- Driver Safety
- Youth Athletics
- Crisis Response Planning

## Contacts For Questions

### Coverage Questions

Your Local Agent or:

Jennifer McKenzie  
Arthur J. Gallagher Risk Management Services Inc. - Tulsa  
1300 South Main  
Tulsa, OK 74119  
Phone: 918-764-7137  
Toll-Free: 866-444-0061  
Fax: 866-420-0695  
Email: jennifer\_mckenzie@ajg.com

#### Eastern Oklahoma Schools (East of I-35)

Guy Griggs  
Keystone Insurance  
11 East Broadway  
Sand Springs, OK 74063  
Phone: 918-245-2558  
Fax: 918-245-8553  
Email: guy.griggs@insurica.com

### General Program Questions

David Martin  
Executive Director  
P O Box 3068  
Tulsa, OK 74101  
Phone: 918-688-1056  
Fax: 866-420-0695

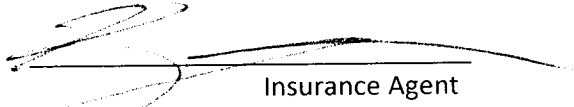
### OSIG Board Members

Terry Davidson - Chairman	Comanche Schools	(580) 439-2900
Rick Thomas - Vice Chairman	Skiatook Schools	(918) 396-1792
Dr. John Cox - Treasurer	Peggs Schools	(918) 598-3412
Dusty Ricks - Secretary	Mid America Technology Center	(405) 449-3391
Randy Hughes - Member	McAlester Schools	(918) 423-4771
Brad Overton - Member	Cordell Schools	(580) 832-3220
Sherry Durkee - Member	Sand Springs Schools	(918) 246-1406

NON-KICKBACK AFFIDAVIT

STATE OF OKLAHOMA  
COUNTY OF MUSKOGEE

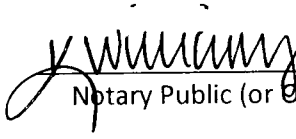
The undersigned person, of lawful age, begin first duly sworn on oath says this invoice is true and correct and that s(he) is authorized to submit the invoice pursuant to a contract or purchase order. Affiant further states that the (work, services, or materials) as shown by this invoice have been (completed or supplied) in accordance with the plans, specifications, orders, requests, or contract furnished or executed by the affiant. Affiant further states that s(he) has made no payment directly or indirectly to any elected official, officer or employee of the (county, municipality, school district) or money or any other thing of value to obtain payment of the invoice or procure the contract or purchase order pursuant to which an invoice is submitted.

  
Insurance Agent

Subscribed and sworn to before this 1<sup>st</sup> day of June, 2020

My Commission Expires 03/22/2021

Commission Number 13002845

  
Notary Public (or Officer having Power to Administer Oaths)



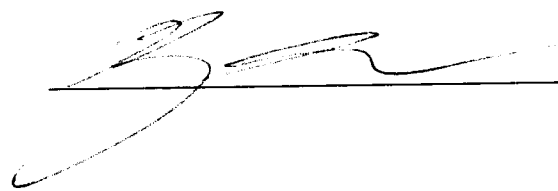
STATE OF OKLAHOMA )

) SS:

COUNTY OF MUSKOGEE )

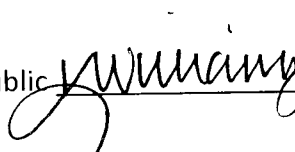
NON-COLLUSION AFFIDAVIT

The undersigned person, of lawful age, being duly sworn, on oath, says that he/she is the agent authorized by the bidder to submit the attached bid. Affiant further states that the bidder has not been a party to any collusion among bidders in restraint of freedom of competition by agreement to bid at a fixed price or to refrain from bidding; or with any state or county official or employees as to quantify, quality, or price in the prospective contract; or in any discussions between bidders and any state official concerning exchange of money or other things of value for special consideration in the letting of a contract.

  
\_\_\_\_\_

Agent

Subscribed and sworn to me this 1<sup>st</sup> day of June, 2020.

Notary Public   
\_\_\_\_\_

Commission Number 13002845 Commission Expires 03/22/2021

**Resolution of Oakdale Public Schools to Join  
Oklahoma Schools Insurance Group**

**Whereas, Oklahoma Schools Insurance Group (“OSIG”)** is an Oklahoma interlocal formed in accordance with Oklahoma law to enable Oklahoma School Districts to cooperate with each other to procure insurance services, benefits and insure against losses and possible liabilities in the most cost effective manner; and

**Whereas, Oakdale Public Schools** is an Oklahoma public school district (“the District”); and

**Whereas,** OSIG has provided to the District a Plan Document which includes a quotation for certain insurance coverages for the 2020/2021 plan year; and

**Whereas,** the quotation is acceptable to the District;

**Now, therefore be it resolved,** that the District hereby joins OSIG as a Member;

**Be it further resolved,** that so long as the District remains as a Member, the District shall comply with OSIG’s bylaws, the Plan Document, and OSIG claim reporting procedures; and

**Be it further resolved,** that by the adoption and signing of this resolution, Oakdale Public Schools understands and agrees that school district members are responsible for their own loss experience and will not be singly responsible for other members’ losses.

Date: \_\_\_\_\_

**Oakdale Public Schools**

\_\_\_\_\_  
By: President, Board of Education

ATTEST:

\_\_\_\_\_  
Clerk, Board of Education



5/31/2020

Oakdale Public Schools  
Dr. Joe Pierce, Superintendent  
10901 N. Sooner Rd.  
Edmond, OK 73013-8310

RE: 2020-2021 Insurance Proposal

Dear Dr. Pierce,

We are pleased to present the enclosed proposal for your insurance program with Oklahoma Schools Insurance Group (OSIG). Please review carefully and let me know if you have any questions.

OSIG: Package Proposal is based on updated information received from your office.

- OSIG's loss limit per occurrence is now \$500,000,000 subject to school statement of value, per district.
- OSIG added – Coverage Provision – 365-day notice for windstorm and hail losses. All windstorm or hail claims should be reported to the carrier as soon as possible, but in no event more than 365 days from the date of the loss, otherwise, coverage will be forfeited.
- OSIG added - Coverage Provision - Margin Clause - Regarding each Building or Structure, the carrier will pay up to 125% of the individually stated value for anyone building or any one structure as shown on the latest statement of value on file with the company. Blanket coverage will apply on contents if the contents limit is at least 10% of the building value; otherwise, contents will be subject to the Margin Clause. Please review the property statement of value to make sure all building/structure limits are adequate. Let me know if any changes need to be made. In reviewing the property schedule there is one location that does not have 10% on Business Personal Property, the estimated additional premium to increase would be \$20.

118 N.16<sup>th</sup> Street, P.O. Box 429,  
Muskogee, Oklahoma 74402-0429  
PH: 918-683-7844 Fax: 918-687-0244  
Watts: 1-800-259-4677

6601 N Broadway Ext., Suite 130, P.O. Box 18858  
Oklahoma City, Oklahoma 73154-0858  
PH: 405-842-2337 Fax: 405-842-0051  
Watts 1-800-699-5905

- Total property values have been increased from \$41,837,115 to \$42,011,234 in order to keep in line with replacement cost valuations. During the current policy term, the new addition was added to the policy with a value of \$2,814,625 total for Building and Business Personal Property.
- Property Deductible remains at \$25,000. per occurrence, \$25,000. Windstorm/Hail Deductible per occurrence, \$1,000. Boiler/Machinery Deductible per occurrence and \$50,000. Flood, Earthquake and Pollution deductible. Optional increased deductibles can be offered for a premium savings. If interested, please let me know.
- Basis of settlement is Replacement Cost - Except for roofs over 15 years old, Autos, Contractor's Equipment and Debris Removal which is ACV basis (Actual Cash Value).
- Extra Expense Limit is \$1,000,000.
- All Builders Risk Projects must be reported to OSIG. You may request up to \$2,500,000. Builders Risk limit at no charge, higher limits are available for a premium charge. (Frame projects are subject to approval).
- Commercial Auto: The auto schedule is included in the proposal for your review.
- \$1,000. Auto Liability Property Damage Deductible remains on the policy. This would apply to any Auto Liability claim in regard to resulting property damage.
- Only vehicles that have an Actual Value listed next to them include physical damage coverage. On the enclosed auto schedule, the vehicles with \$0 listed next to them (under Actual Value column), do not have physical damage coverage (Comprehensive or Collision coverage).
- Inland Marine Floater limit is \$265,000.
- Electronic Data Processing Equipment limit is \$250,000.
- Coverage includes Cyber Liability for members. Please see the attached proposal for limits and applicable deductible.
- School Violent Acts Protection is included in the program as well. Please see attached proposal for the limits and deductibles that would apply.
- The OSIG by-laws include a three-year re-entry clause should a member elect to exit the group. The member's equity in OSIG will be forfeited and they will not be allowed to re-enter the program for 3 years from the time of exit from the program.
- For the 2020-2021 plan year, OSIG is requiring the resolution to be signed by the member's Board of Education and returned to OSIG in order to bind coverage effective 07/01/2020.

- Limited Flood coverage is provided, Flood Zones A and V are excluded. If you have property located in a Flood Zone and would like a quote, please let me know.
- Please refer to the 4/30/2020 email from OISG which include their Plan Updates for 2020-2021 term. This information includes some changes to the plan document.

**OSIG Premium Summary:**

<b>Coverage</b>	<b>2020-21 OSIG Annual Renewal</b>	2019-20 OSIG Annual Expiring	2019-20 OSIG with Distribution Credit of \$3,292.
<b>Property</b>	\$84,790	\$69,455	\$66,736
<b>Boiler</b>	\$ 621	\$ 613	\$ 589
<b>General Liability</b>	\$ 4,006	\$ 3,921	\$ 3,768
<b>Commercial Auto</b>	\$ 6,676	\$6,211	\$ 5,968
<b>Educators Legal Liability</b>	\$ 4,006	\$3,911	\$ 3,768
<b>Total:</b>	<b>\$100,099</b>	<b>\$80,829</b>	<b>\$80,829</b>

***IMPORTANT:** If you decide to move your Educators Legal Liability & Employment Practices Liability coverage from OSIG at renewal, we recommend you purchase the Extended Claims reporting Endorsement on your expiring policy. This endorsement can be issued for 24 months for an estimated additional premium of \$7,822. This endorsement would allow you to report claims to the carrier that occurred during this policy period but are not reported to the carrier until after the expiration date of this policy. Since the Educators Legal Liability/EPLI policy is on a claims-made basis we feel this endorsement should be purchased.*

Please review all of the included information as we feel it is beneficial to assist you in your decision on the insurance coverage for the 2020-21 term. OSIG's financial statement is strong and they submit to an independent audit each year. The financial condition of an insurance provider should be the number one consideration when making a decision on renewal. This assures that funds are available for payment of claims.

Your current coverage will expire on 07/01/2020. Please advise if we are to proceed with renewal prior to this date. If you have any questions, please feel free to contact your agent, Will Beckman or myself. We will be happy to assist you.

Sincerely,

*Pam Johnson*

Pamela C. Johnson  
 The Beckman Company  
 pjohnson@beckmancompany.com  
 Website: www.beckmancompany.com



## NONDISCRIMINATION

The Oakdale Board of Education is committed to a policy of nondiscrimination in relation to race, color, religion, sex, age, national origin, alienage, handicap, or veteran status. This policy will prevail in all matters concerning staff, events, students, the public, employment, admissions, financial aid, educational programs and services, facilities access, and individuals, companies, and firms with whom the board does business. Racial discrimination shall include racial slurs or other demeaning remarks concerning another person's race, ancestry, or country of origin and directed toward an employee, a student or a visitor.

The following statement will be included in all course announcements, bulletins disseminated to all students, materials used for recruiting or describing programs and training, application or enrollment forms, brochures, and catalogs:

"The Oakdale Board of Education does not discriminate on the basis of disability, race, color, religion, national origin, sex, age, qualified handicap, or veteran status." When an open forum is created whereby non-curricular groups are allowed to meet on school premises Boy Scouts and other designated youth groups will have equal access.

Inquiries concerning application of this policy may be referred to

Mike Franz, Middle School Principal  
Student Compliance Coordinator  
[mfranz@oakdale.org](mailto:mfranz@oakdale.org)

Marlen Martinez  
Employee Compliance Coordinator  
[mmartinez@oakdale.org](mailto:mmartinez@oakdale.org)

Kim Lanier, District Superintendent  
Compliance Coordinator  
[klanier@oakdale.org](mailto:klanier@oakdale.org)

Oakdale \_\_\_\_\_  
District

10901 N Sooner \_\_\_\_\_  
Street Address

405-771-3373 \_\_\_\_\_  
Telephone

Edmond, OK 73013 \_\_\_\_\_  
City, State, Zip

**REFERENCE:** Oklahoma Constitution, Article 1, Section 6  
Title 6, Title 7, Civil Rights Act of 1964 as amended by the Equal Employment Opportunity Act of 1972  
Executive Order 11246, as amended by Executive Order 11375  
Equal Pay Act, as amended by the Education Amendments of 1972  
Rehabilitation Act of 1973, §504  
Education for All Handicapped Children Act of 1975  
Immigration Reform and Control Act of 1986  
Americans With Disabilities Act of 1990, 42 U.S.C. §12101  
Individuals With Disabilities Education Act, 20 USC §1400, et seq.

## RACIAL HARASSMENT

Any faculty or staff member found to be guilty of verbal acts, such as racial slurs, disparaging comments, or epithets; or physical acts, such as harassment or intimidation, may be subject to any or all of the following disciplinary actions, according to the severity of the action:

- First: An administrative reprimand will be placed in the offending party's personnel file.
- Second: An official board of education reprimand, along with compulsory participation in an equity assurance workshop.
- Final: A required appearance before the board of education for the specific purpose of imposing sanctions, up to and including suspension without pay or complete dismissal from service.

Any student found to be out of compliance with this policy through verbal acts, such as racial slurs, disparaging comments or epithets; or physical acts, such as harassment or intimidation, will be subject to discipline under the guidelines of the school discipline policy.

### Counseling Services

Any student who is a victim of discrimination or is found to be guilty of discriminatory behavior will have available counseling services through the counseling services of the school district.

Any person found to be either a victim or offender in an incident of a discriminatory nature shall be made aware of counseling services that are available through the counseling services of the guidance services with OKLAHOMA County, Oklahoma.

## SEXUAL HARASSMENT

The policy of this school district forbids discrimination against any employee or applicant for employment on the basis of sex. The Oakdale Board of Education will not tolerate sexual harassment by any of its employees. This policy applies to non-employee volunteers whose work is subject to the control of school personnel.

### General Prohibitions

1. Unwelcome Conduct of a Sexual Nature
  - A. Conduct of a sexual nature may include verbal or physical sexual advances, including subtle pressure for sexual activity; touching, pinching, patting, or brushing against; comments regarding physical or personality characteristics of a sexual nature; and sexually-oriented "kidding" "teasing," double meanings, and jokes.
  - B. Verbal or physical conduct of a sexual nature may constitute sexual harassment when the allegedly harassed employee has indicated, by his or her conduct, that it is unwelcome.
  - C. An employee who has initially welcomed such conduct by active participation must give specific notice to the alleged harasser that such conduct is no longer welcome in order for any such subsequent conduct to be deemed unwelcome.

# OAKDALE POLICY

## 2. Sexual Harassment

For the purpose of this policy, unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature constitute sexual harassment if:

- A. Submission to the conduct is made either an explicit or implicit condition of employment;
- B. Submission to or rejection of the conduct is used as a basis for an employment decision affecting the harassed employee; or
- C. The conduct substantially interferes with an employee's work performance, or creates an intimidating, hostile, or offensive work environment.

### Specific Prohibitions

#### 1. Administrators and Supervisors

- A. It is sexual harassment for an administrator or supervisor to use his or her authority to solicit sexual favors or attention from subordinates when the subordinate's failure to submit will result in adverse treatment, or when the subordinate's acquiescence will result in preferential treatment.
- B. Administrators and supervisors who either engage in sexual harassment or tolerate such conduct by other employees shall be subject to sanctions, as described below.

#### 2. Non-administrative and Non-supervisory Employees

It is sexual harassment for a non-administrative and non-supervisory employee to subject another such employee to any unwelcome conduct of a sexual nature. Employees who engage in such conduct shall be subject to sanctions as described below.

### Report, Investigation, and Sanctions

- 1. It is the express policy of the board of education to encourage victims of sexual harassment to come forward with such claims. This may be done through the Employee Grievance policy.
  - A. Employees who feel that administrators or supervisors are conditioning promotions, increases in wages, continuation of employment, or other terms or conditions of employment upon sexual favors, are encouraged to report these conditions to the appropriate administrator. If the employee's direct administrator or supervisor is the alleged offending person, the report will be made to the next higher level of administration or supervision, unless it is the superintendent who is the alleged offender. In which case, the complaint shall be referred to the board president.
  - B. Employees are also urged to report any unwelcome conduct of a sexual nature by supervisors or fellow employees if such conduct interferes with the individual's work performance or creates a hostile or offensive working environment.
  - C. Confidentiality will be maintained; however, absolute confidentiality cannot be guaranteed because of due process concerns that arise in sexual harassment investigations. No reprisals or retaliation will be allowed to occur as a result of the good faith reporting of charges of sexual harassment.

2. In determining whether alleged conduct constitutes sexual harassment, the totality of the circumstances, the nature of the conduct, and the context in which the alleged conduct occurred will be investigated. The superintendent has the responsibility of investigating and resolving complaints of sexual harassment.

3. Any employee found to have engaged in sexual harassment shall be subject to sanctions, including, but not limited to warning, suspension, or termination subject to applicable procedural and due process requirements.

## **GENDER NONDISCRIMINATION**

### District Employment Activities

Applies to all aspects of the district's employment programs, including but not limited to, recruitment, advertising, process of application for employment, promotion, granting of tenure, termination, layoffs, wages, job assignments, leaves of absence of all types, fringe benefits, training programs, employer-sponsored programs, including social or recreational programs and any other term, condition, or privilege of employment. Specifically, the following personnel employment practices are prohibited:

A. Tests--Administration of any test or other criterion that has a disproportionately adverse effect on persons on the basis of gender unless it is a valid predictor of job success and alternative tests or criterion are unavailable.

B. Recruitment--Recruitment of employees from entities which furnish as applicants members of only or predominantly one gender, if such action has the effect of discrimination on the basis of gender.

C. Compensation--Establishment of rates of pay on the basis of gender.

D. Job Classification--Classification of jobs as being for males or females.

E. Fringe Benefits--Provision of fringe benefits on the basis of gender; all fringe benefit plans must treat males and females equally.

F. Marital and Parental Status--Any action based on marital or parental status; pregnancies are considered temporary disabilities for all job-related purposes and shall be accorded the same treatment by the district as are all other temporary disabilities. No inquiry shall be made by the district in job applications as to the marital status of an applicant, including whether such applicant is "Miss" or "Mrs.," but inquiry may be made as to the gender of a job applicant for employment if made of all applicants and is not basis for discrimination.

G. Employment Advertising--Any expression of preference, limitation, or specification based on gender, unless gender is a bona fide occupational qualification for the particular job in question.

# OAKDALE POLICY

## Policy Enforcement

To ensure compliance with board policy, the superintendent shall:

1. Designate a member of the administrative staff to:
  - A. Coordinate efforts of the district to comply with these regulations;
  - B. Develop and ensure the maintenance of a filing system to keep all records required under these regulations;
  - C. Investigate any complaints of violation of these regulations;
  - D. Administer the grievance procedure established in these regulations; and
  - E. Develop affirmative action programs, as appropriate; and
2. Provide for the publication of these regulations on an ongoing basis to students, parents, employees, prospective employees, and district employee unions or organizations, such publication to include the name, office, address, and telephone number of the compliance administrator designated above.

## **ADA NONDISCRIMINATION**

The Americans with Disabilities Act of 1990 (ADA) secures the right of individuals (whether employees, students, visitors, or others) to file a complaint with a school district or other public entity in any instance in which an individual believes that a violation of the ADA requirements related to public entities has occurred. Any employee who believes a violation of the ADA's requirements, related to the district, has occurred with respect to the employee's employment may utilize the applicable employee grievance procedure. Any employee who believes that a violation has occurred that does not involve the employee's employment, may utilize this grievance procedure to secure review of a complaint. Likewise, any individual or organization may utilize this grievance procedure to secure a review of a claim, cause, or concern arising under the ADA.

The district's ADA compliance officer shall provide, upon request, a grievance form. The form shall include the individual's name and address, an explanation of the grievance, and reference to facts, documents, witnesses, or other proof of support for the claim. (See DAA-E3.)

Additionally, each individual filing a grievance shall state the relief requested and any recommendation for addressing, correcting, or otherwise adjusting the source of the perceived problem, concern, or complaint.

The ADA compliance officer will immediately review the grievance. The compliance officer will determine whether the grievant has supplied the information necessary to permit reasonable investigation of the claim or charge. If an insufficient statement of the grievance is submitted or if additional information is desirable, the compliance officer will inform the grievant. The grievant will have ten (10) calendar days to supply the necessary information. In the absence of supplemental information, the compliance officer will proceed with investigation of the claim.

The compliance officer or designee will investigate the grievance. The investigation shall consist of a review of documents, interviews with appropriate individuals, and other action consistent with the nature and scope of the grievance.

The investigation must be completed within thirty (30) days of submission of the grievance. In the event the grievant submits additional information pursuant to the request of the compliance officer, the report shall be due within thirty (30) days of the submission of additional information. The compliance officer's report shall state the grievance, the scope of the investigation, findings related to the grievance, and a recommended disposition. A copy of the grievance decision shall be furnished to the grievant and to the superintendent.

The grievant shall have ten (10) calendar days from receipt of the compliance officer's report to file with the superintendent an appeal of the findings or recommendations made. The superintendent shall schedule a meeting to consider the report and recommendation of the compliance officer and the objections of the grievant. Following this meeting, the superintendent may request additional investigation by the compliance officer, adopt the recommendation of the compliance officer, enter the superintendent's own findings, adopt the relief request of the grievant, or take other action deemed necessary to achieve a reasonable resolution of the grievance.

The decision of the superintendent shall be final. The superintendent's decision shall be rendered within fifteen (15) calendar days from any meeting scheduled to discuss and consider the grievance.

## **DISCRIMINATION COMPLAINTS PROCEDURES**

The following procedures will be used by any person, including personnel and students for the filing, processing, and resolution of alleged discrimination complaints.

### Definitions

1. **Discrimination Complaint:** A written complaint alleging any policy, procedure, or practice to discriminate on the basis of race, color, religion, national origin, sex, qualified handicap, veteran status, or other perceived discrimination.
2. **Student Grievant:** A student of the Oakdale Public School District who submits a complaint alleging discrimination based on race, color, religion, national origin, sex, or qualified handicap.
3. **Employee Grievant:** An employee of the Oakdale Public School District who submits a complaint alleging discrimination based on race, color, national origin, religion, sex, age, qualified handicap, or veteran status.
4. **Public Grievant:** Any person other than a student or employee or employment applicant who submits a complaint alleging discrimination based on race, color, national origin, religion, sex, age, qualified handicap, or veteran status.
5. **Title IX, 504 and ADA Coordinator (District Superintendent):** The person(s) designated to coordinate efforts to comply with and carry out responsibilities under Title IX of the Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, Americans With Disabilities Act of 1990, and other state and federal law addressing equal educational opportunity. The Coordinator is responsible for processing complaints and serves as moderator and recorder during hearings.

# OAKDALE POLICY

6. Respondent: The person alleged to be responsible for the violation alleged in a complaint. The term may be used to designate persons with responsibility for a particular action or those persons with supervisory responsibility for procedures and policies in those areas covered in the complaint.
7. Day: Day means a working day. The calculation of days in complaint processing shall exclude Saturdays, Sundays, and holidays.

## Pre-Filing Procedures

Prior to the filing of a written complaint, the grievant is encouraged to visit with the school principal, and reasonable effort should be made to resolve the problem or complaint.

## Filing and Processing Discrimination Complaints

1. Grievant Submits written complaint to Coordinator stating name, nature and date of alleged violation; names of persons responsible (where known); and requested action. Complaint must be submitted within 30 days of alleged violation. Complaint forms are available in all school offices.
2. Coordinator Notifies respondent within 10 days and asks respondent to:
  1. Confirm or deny facts,
  2. Indicate acceptance or rejection of grievant's requested action, or
  3. Outline alternatives.
3. Respondent Submits answer within 10 days to Coordinator.
4. Coordinator Within 10 days after receiving respondent's answer, Coordinator refers the written complaint and respondent's answer to the building principal. The Coordinator also schedules a hearing with the grievant, the respondent, and the building principal.
5. Principal, Grievant, Hearing is conducted.  
Respondent, & Coordinator
6. Principal Within 10 days after the hearing, issues a written decision to the grievant, respondent, and Coordinator.
7. Grievant or Respondent If the grievant or respondent is not satisfied with the decision, the Coordinator must be notified within 10 days and a hearing with the superintendent requested.
8. Coordinator Within 10 days of receiving a request for a hearing, schedules a hearing with the grievant, respondent, and superintendent.
9. Superintendent, Grievant Hearing is conducted.  
Respondent, &  
Coordinator
10. Superintendent Issues a decision within 10 days following the hearing.
11. Grievant or Respondent If the grievant or respondent is not satisfied with the decision, the Coordinator must be notified within 10 days and a hearing with the board requested.

# OAKDALE POLICY

12. Coordinator      Notifies board within 10 days after receiving a request for hearing. Coordinator schedules the hearing with the board. The hearing is to be conducted within 30 days from the date of notification to the board.

13. Board of Education or      Hearing is conducted.  
hearing panel established  
by the board, Grievant,  
Respondent, &  
Coordinator

14. Board of Education      Within 10 days after the hearing, issues a final written decision regarding the validity of the grievance and any action to be taken.

## General Provisions

1. Extension of Time: Any time limits set by these procedures may be extended by mutual consent of the parties involved. The total number of days from the date that the complaint is filed until the complaint is resolved shall be not more than 180 days.

2. Access to Regulations: The Oakdale Public School District shall provide copies of all regulations prohibiting discrimination on the basis of race, color, national origin, religion, sex, age, qualified handicap, or veteran status upon request.

3. Confidentiality of Records: Complaint records will remain confidential unless permission is given by the parties involved to release such information. No complaint record shall be entered in the personnel files. Complaint records shall be maintained on file for three years after complaint resolution.

4. If respondent and principal are the same person, the above procedures are adjusted accordingly with the first hearing being with the superintendent.

5. The middle school principal shall serve as an alternate Coordinator.

**DISCRIMINATION/HARASSMENT GRIEVANCE FORM**

1. Name and address of the grievant:

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2. Date: \_\_\_\_\_

3. Grievant's telephone numbers: Home \_\_\_\_\_ Office \_\_\_\_\_

4. Name of person responsible: \_\_\_\_\_

5. Statement of grievance (please provide as detailed a statement as is possible and feel free to attach supplemental pages if necessary for a complete understanding of your concerns):

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6. Please identify any documents or other materials that support your grievance. If documents or materials are in your possession, please attach copies to this form.

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7. Indicate any witnesses who may authenticate your allegation: (Do not attach previously prepared affidavits, witness statements, etc.) To add credibility, this part of the investigation is left to the superintendent/board of education or designee.

Names of Witnesses and, if not district employees, any address or phone number if you know:

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# OAKDALE POLICY

8. Please identify what action or relief you are seeking as a result of this grievance.

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\_\_\_\_\_  
Signature of Grievant

Caveat: You are cautioned that any reporting of false allegations may be considered a form of harassment and must also realize that failure to substantiate your allegations does not in and of itself indicate that you are reporting false allegations and should not be the basis of retaliation, provided you do not take the situation outside of the bounds of this procedure. Remember, you do not have a right to malign or defame without evidence the good name of another individual especially to advance you own personal interests.

IF, AS A RESULT OF A DISABILITY, YOU NEED ASSISTANCE IN COMPLETING THIS FORM, PLEASE CONTACT THE DISTRICT SUPERINTENDENT WHO IS THE DISTRICT'S ADA COMPLIANCE OFFICER, FOR ASSISTANCE OR ACCOMMODATION.

# Oakdale School

## Bullying Policy

*This policy should be considered an addendum to the School Discipline Policy for a specific set of circumstances.*

### 1. STATEMENT OF PHILOSOPHY

**Oakdale School** is committed to creating a safe, healthy, learning environment for all students that enhances personal safety and encourages respect, dignity, and equality among students.

**Oakdale School** is committed to creating and maintaining a learning environment that is free from bullying, harassment, and hazing. BULLYING, SEXUAL HARASSMENT, HARASSMENT, OR HAZING WILL NOT BE TOLERATED ANYWHERE AT OAKDALE SCHOOL. This includes school facilities, premises, and non-school property if the student is at any school-sponsored, school-approved or school-related activity, event or function (i.e. field trips or competitive athletic events) where students are under the supervision of staff.

This policy and definitions include electronically transmitted acts.

### 2. DEFINITIONS

#### Bullying

- ❖ Bullying is the exploitation of a less powerful person, by an individual taking unfair advantage that is repeated over time, and has a negative effect on the victim.
- ❖ Bullying is aggressive behavior or intentional harm
- ❖ Bullying can be physical, verbal, or emotional
- ❖ Bullying is carried out repeatedly over time; not a one time action
- ❖ Bullying occurs within an interpersonal relationship characterized by an imbalance of power
- ❖ **Bullying:** Name calling, racial slurs, pushing, crowding, or concerning hitting, pinching, making fun of a person's body, telling mean jokes about someone, threatening to hurt someone, obscene gestures, hitting someone, taking things without permission.
- ❖ As used in the School Safety and Bullying Prevention Act:
  - 1. "Bullying" means any pattern of harassment, intimidation, threatening behavior, physical acts, verbal or electronic communication directed toward a student or group of students that results in or is reasonably perceived as being done with the intent to cause negative educational or physical results for the targeted individual or group and is communicated in such a way as to disrupt or interfere with the school's educational mission or the education of any student. This definition shall also include cyberbullying.
  - 2. "At school" means on school grounds, in school vehicles, at school-sponsored activities, or at school-sanctioned events;
  - 3. "Electronic communication" means the communication of any written, verbal, pictorial information or video content by means of an electronic device, including, but not limited to, a telephone, a mobile or cellular telephone or other wireless telecommunication device, or a computer; and
  - 4. "Threatening behavior" means any pattern of behavior or isolated action, whether or not it is directed at another person,

- that a reasonable person would believe indicates potential for future harm to students, school personnel, or school property; and
- 5. "Obscene material" or "child pornography" shall have the same meaning as such terms are defined in Section 1024.1 of Title of the Oklahoma Statutes.

### **Bullies**

Bullies do not necessarily target a specific individual to bully. Therefore, the Oakdale School district does not limit bullying to cases that have a victim that has been bullied. The emphasis is on the nature of the bullying behavior. A series of incidents may not identify a recipient of bullying by definition but a series of incidents may well identify a bully. This policy will be applied as needed in those situations.

### **Sexual Harassment**

- ❖ Sexual harassment is a form of discrimination based on sex. Discrimination based on sex means treating someone differently because she or he is female or male. Sexual harassment is illegal and is prohibited by Title IX of the 1972 Education Amendments and Title VII of the Civil Rights Act of 1964.
- ❖ Sexual harassment is unwanted and unwelcome sexual behavior
- ❖ Sexual harassment can be physical, verbal, including gestures or displays
- ❖ Sexual harassment can happen once, several times or on a daily basis
- ❖ Sexual harassment interferes with the victim's academic or social life
- ❖ Sexual harassment is touching someone in ways that are **not OK** with her/him, making fun of someone's private body parts, passing a note that says sexual things about someone's body, continuing to tell dirty jokes around someone after she/he as asked the person to stop, making slurs about someone's sexual orientation, pressuring someone for sexual touches.

### **Harassment**

Harassment is intimidation by threats of or actual physical violence; the creation by whatever means of a climate of hostility or intimidation; or the use of language, conduct, or symbols in such manner as to be commonly understood to convey hatred, contempt, or prejudice or to have the effect of insulting or stigmatizing an individual. Harassment includes but is not limited to harassment on the basis of race, sex, creed, color, national origin, religion, marital status, or disability.

### **Hazing**

For the purposes of this policy, hazing is defined as an activity that recklessly or intentionally endangers the mental health or physical health or safety of a student for the purpose of initiation or admission into or affiliation with any organization sanctioned or authorized by the board of education.

"Endanger the physical health" shall include, but is not limited to, any brutality of a physical nature, such as whipping; beating; branding; forced calisthenics; exposure to the elements; forced consumption of any food, alcoholic beverage, drug, or controlled dangerous substance; or other forced physical activity which could adversely affect the physical health or safety of the individual.

"Endanger the mental health" shall include any activity, except those activities authorized by law, which would subject the individual to extreme mental stress, such as prolonged sleep deprivation, forced prolonged exclusion from social contact, forced conduct which could result in extreme embarrassment, or any other forced activity which could adversely affect the mental health or dignity of the individual.

### 3. EDUCATION

Oakdale School believes that the best way to prevent bullying is through education and will provide for an educational program as designed and developed by the State Department of Education and in consultation with the Office of the Attorney General for students and parents, administered by the Oklahoma Office of Juvenile Affairs that addresses:

- a. the possible legal consequences, which may include criminal penalties, of sharing, by means of an electronic communication, obscene material or child pornography,
- b. other possible consequences of sharing, by means of an electronic communication, obscene material or child pornography, including:
  - (1) negative effects on relationships,
  - (2) loss of educational and employment opportunities, and
  - (3) possible removal, if applicable, from certain school programs or extracurricular activities,
- c. the unique characteristics of the Internet and other communications networks that could affect obscene material or child pornography, including:
  - (1) search and replication capabilities, and
  - (2) a potentially worldwide audience,
- d. the prevention of, identification of, responses to, and reporting of incidents of cyberbullying, and
- e. the connection between bullying, cyberbullying and a minor sharing obscene material or child pornography.

### 4. SPEAK UP WHEN POSSIBLE

If possible, the target should tell the bully/harasser to stop. To the extent that a person feels safe and comfortable, doing so, a target is first encouraged to confront the bully / harasser, telling them to stop because their actions are unwelcome. Bystanders are also encouraged to speak up when possible, telling the bully or harasser to stop the conduct because it is disrespectful, unwelcome, hurtful, unfair, etc.

### 5. REPORTING

Reporting bullying and harassment to school staff is encouraged. Anyone may report bullying and harassment. They may report it to a teacher who will report the incident to an administrator. The staff is expected to act on all reports and to pass the report on to the school administrator. It is preferred that reports of bullying be made in person or in writing signed by the reporting party. However, in order to encourage full and complete reporting of such prohibited activities any person may report such incidents in writing and anonymously by providing such reports to the personal attention of any school staff member.

### 6. TATTLING VS. REPORTING

Oakdale School defines **tattling** as telling an adult about another student's actions with the sole purpose of getting that student in trouble.

Oakdale School defines **reporting** as telling an adult about another student's actions with the purpose of getting help with a difficult situation, e.g., one that is threatening or hurtful.

Since there is a great deal of discretionary judgment involved in the difference between tattling and reporting the teacher or school authority being told will have the authority of decision.

#### **7. CONFIDENTIALITY**

Oakdale School staff will strive to maintain confidentiality of any student target or bystander who reports bullying or sexual harassment. The school staff will also respect the confidentiality of the student accused of bullying or sexual harassment. Any disclosure of reported information, including the identity of a student, will be made only to individuals involved in the school's response to the incident. Everyone involved should be aware of the Safe Schools Hotline.

#### **8. NO RETALIATION**

Oakdale School will not tolerate retaliation for reporting bullying or harassment. School staff will discipline any student who retaliates against anyone who reports an incident, or against any person who testifies, or assists in an investigation. Retaliation includes, but is not limited to; any form of intimidation, reprisal, or harassment, whether physical or verbal.

#### **9. STUDENT ACCOUNTABILITY**

Oakdale School expects students to demonstrate respectful behavior throughout campus, on the bus, and at all school-sponsored events. Students whose behavior is found to be in violation of this policy will be subject to appropriate sanctions. These sanctions will fall into the administrative guidelines and authority as outlined in the school discipline policy.

The school counselor will conduct classes appropriate to age / grade level to help students identify and deal with bullying.

#### **10. STAFF ACCOUNTABILITY**

All school staff are expected to model respectful interaction with all students and staff, at all times. Staff are expected to respond to bullying and sexual harassment incidents immediately, and in a manner consistent with school policy. Training will be provided to educate and to enhance staff skills for responding effectively to bullying and sexual harassment.

Staff who witness an incident among students are expected to intervene by:

- ❖ Responding immediately
- ❖ Establishing the safety of the target
- ❖ Educating both students by identifying the unacceptable behavior and explaining its harmful impact on the target and other students
- ❖ Setting a logical, reasonable and educational consequence for the bullying or harasser, which promotes the safety of the target.
- ❖ Targets will not receive consequences unless retaliation occurs.

#### **11. Investigation of Bullying**

All formal or informal bullying complaints shall be promptly investigated as quickly as is reasonably possible. The following are established as guidelines for investigations that focus upon allegations of bullying.

- A. After receiving a report or complaint of bullying, the building principal or his/her designee (the Investigator) shall promptly investigate or authorize the undertaking

investigation of the claim to determine if the District's policy against bullying has been violated.

B. The investigation of a bullying claim may consist of personal interviews with the complaining party, the person or persons alleged to have engaged in the bullying conduct and any other persons or witnesses identified by the complaining party or other person who may have knowledge pertaining to the incidents or events alleged to have given rise to the claim. The investigation can also include a review of any written materials furnished by any party that is claimed to have some bearing on the issues raised by the complaint.

C. In conducting the investigation, the investigator shall review all the relevant facts and circumstances to confirm or deny the claims of bullying in order to determine if the policy has been violated. Factors the investigator can consider include but are not limited to:

1. The nature of the behavior
2. How often the conduct occurred
3. Whether there were past incidents or past continuing patterns of behavior
4. The relationship between the parties involved
5. The race, national origin, sex and age of the victim
6. The identity of the perpetrator, including whether the perpetrator was in a position of power over the student allegedly subjected to harassment
7. The number of alleged bullies
8. The age of the alleged bully
9. Where the bullying occurred
10. Whether there have been other incidents in the school involving the same or other students
11. Whether the conduct adversely affected the student's education or educational environment
12. The context in which the alleged incidents occurred pending criminal charges, if any.

D. While awaiting completion of the investigation and if circumstances warrant, the School District, as soon as reasonably possible, shall take appropriate and reasonable steps to protect the individual who is allegedly being bullied from the alleged harasser, until the matter can be fully investigated and the appropriate remedial steps taken.

E. At the conclusion of the investigation and based upon facts taken as a whole and the totality of the circumstances, the investigator shall determine whether a violation of the School District's bullying policy has been established. If a violation is established, the School District will take prompt action to address the violation.

## **12. Disciplinary Action for Bullying Conduct:**

A. Any student engaging in bullying is subject to any and all disciplinary actions that may be imposed under the School District's Student Discipline / Behavior Policy. Administrative responses to bullying referrals will be determined by the frequency and/or severity or the nature of the incident(s) as outlined in section 11 – C.

B. The administrator may use a variety of consequences in response to the bullying behavior. The district discipline policy addresses a list of consequences. These responses may include but are not limited to the following:

1. Conference with the student(s)
2. Written and / or verbal apology to victimized student(s)
3. Contact and / or conference with the parent(s) / guardian(s)

4. Disciplinary Assignment
5. Loss of privileges
6. Restitution for damages
7. In School Detention
8. Short term suspension (shorter than 10 days)
9. Long term suspension (10 days or longer)
10. Law enforcement contact
11. Referral to outside agencies

Through education, the district is committed to stopping bullying before it starts. If those attempts are not successful then consequences will be applied. The application of consequences will be progressive in nature. For instance, if there has been a loss of privileges for a previous infraction, then a subsequent incident will be at least the same degree of consequence. At the end of a school year or a 6 month period whichever is longer, the process can start over at the discretion of the administrator. If there is a third incident in that time period, short term suspension will be mandatory.