Agenda of Regular Meeting
Thursday, February 22, 2024
The Board of Trustees
Richardson ISD

A Regular Meeting of the Board of Trustees of Richardson ISD will be held Thursday, February 22, 2024, beginning at 6:00 PM in the Administration Building, 400 S. Greenville Ave, Richardson, TX 75081.

Prior to or during consideration of agenda subjects, the board will hear public comments from any member of the public who has complied with District procedures for signing up to speak. The notice for this meeting was posted on February 19, 2024.

Public Comments: - Persons wishing to address the Board must complete an online Public Comment form by signing up at https://web.risd.org/board/public-comments/ beginning when the meeting agenda is posted through 12:00 p.m. on the day of the meeting. RISD will not accept submissions after 12:00 p.m. on the posted meeting date. Persons who do not have access to a computer to complete the Public Comment form online may contact the Board Office during normal business hours at 469-593-0403 (español 469-593-0312) for assistance. Persons wishing to speak must complete the online registration form in full and be present at the meeting to make his/her own comments during the designated time for Public Comment to be eligible to speak. Any registered speaker who is absent from the meeting at the time for Public Comment forfeits the opportunity to address the Board at that meeting.

Disruptions. Disruptive behavior will not be tolerated during a meeting. After providing at least one warning to a disruptive visitor, the presiding officer may request assistance from law enforcement officials to remove from the meeting any person who continues to disrupt the meeting by utterances or actions. A visitor who exhibits disruptive behavior in a subsequent meeting may be issued a trespass warrant. It is a criminal offense for a person, with intent to prevent or disrupt a lawful meeting, to substantially obstruct or interfere with the ordinary conduct of a meeting by physical action or verbal utterance.
The subjects to be discussed or considered or upon which any formal action may be taken are listed below. Items do not have to be taken in the same order as shown on this meeting notice.

I. **CALL TO ORDER**
- A. Pledge of Allegiance / Moment of Silence 6
- B. Announcements / Communications
  Recognition of Schools, Students and Staff

II. **PUBLIC HEARING**
- A. Public Comment on Annual Performance Report
- B. Annual Performance Report 8

Action Item

III. PUBLIC COMMENT SECTION

Comments from visitors who submitted the form requesting to address Board Members.

A. Agenda Related Topic

B. Non-Agenda Related Topic

IV. CONSENT / CONFIRMATION AGENDA ITEMS

Submitted for Action and/or Information

A. Minutes of January 18, 2024 14

Action Item

B. Human Resources Report 20

Action/Information Item

C. Recommended Specified Best Value/Low Bids, Contracts and Cumulative Purchases 27

Action/Information Item

Part A: New Bids - For Approval

Miscellaneous Consultant Services

Cheerleading and Drill Team Supplies & Related Items

Master Scheduling System

Online Subscriptions including Curriculum Delivery and other Online Delivery Services

Commodity Discount Providers

Part B: Bid Renewals - For Approval

Annual Audit Services

Part C: Contract Information (Greater than $100,000) - For Approval

Netsync Network Solutions - Student devices for the 2024-2025 school year (RISD # 21-124)

Delcom Group - Interactive Flat Panel Displays and Installation (RISD # 24-282/TIPS 230901)

Interface Americas - Flooring Replacement - Summer 2024, Materials ONLY - RISD Academy (Sourcewell 061323-IFA)

Delcom Group - LHMS Gym Audio Visual with ScoreVision (TIPS 230105)

Stantec - Multi-Campus Flooring Replacement - Summer 2024 (RISD 23-276)

Interface Americas - Flooring Replacement - Summer 2024, Materials ONLY - Richland Elementary (Sourcewell 061323-IFA)

Interface Americas - Flooring Replacement - Summer 2024, Materials ONLY - Forestridge Elementary (Sourcewell 061323-IFA)

Enviromatic Systems - LHE EMA Controls Upgrades (RISD 22-186)

Amanda Coffey (Behavior Network) - to provide special education services through June 30, 2024 for student 2.

Interface Americas - Flooring Replacement - Summer 2024, Materials ONLY - Northwood Hills Elementary (Sourcewell 061323-IFA)

Netsync Network Solutions - Lake Highlands Middle School Purchase and the installation of Network Uninterrupted Power Supply's (DIR-CPO-4430)

Interface Americas - Flooring Replacement - Summer 2024, Materials ONLY - Richardson Heights Elementary (Sourcewell 061323-IFA)

Amanda Coffey (Behavior Network) - to provide special education services through June 30, 2024 for student 1.

Interface Americas - Flooring Replacement - Summer 2024, Materials ONLY - Jess Harben Elementary (Sourcewell 061323-IFA)

Interface Americas - Flooring Replacement - Summer 2024, Materials ONLY - Spring Creek Elementary (Sourcewell 061323-IFA)

Interface Americas - Flooring Replacement - Summer 2024, Materials ONLY - O. Henry Elementary (Sourcewell 061323-IFA)

Part D: Interlocal Agreements, Memorandums of Understanding, Cooperative Agreements, and Other - For Approval

Interlocal Agreements:

Region 10 ESC Multi-Region Purchasing Cooperative SY 24-25

City of Richardson - Temporary Construction Easement

The University of Mississippi - Clinical Education and Training Affiliation Agreement - Term (1) year with (4) additional one-year terms

Memorandums of Understanding:

The Impact Counselors - Counseling services for RISD students.

Cooperative Agreements:

CDW Government LLC per TIPS #230105 thru 5/31/2028 for Technology Solutions Products and Services

CDW Government LLC per DIR-CPO-5093 thru 11/21/2024 for Product, Services, and Related Services

Delcom Group Technology Solutions per TIPS #230105 thru 5/31/2028 for Technology Solutions Products and Services

Delcom Group Technology Solutions per TIPS #230901 thru 11/30/ 2026 for Audio Visual Equipment, Supplies and Services

Interface Americas Inc. per Sourcewell #061323-IFA thru 8/9/2027 for Flooring Materials with Related Supplies and Services

JourneyEd.com per DIR-CPO-4451 thru 5/8/2024 for Products and Related Services

Technology for Education per TIPS #230105 thru 5/31/2028 for Technology Solution Products and Services

Other:

None

Part E: Contracts, Contract Modifications & Change Orders: Less than $100,000 (Information Only)

Jessica Dieke - Licensed Specialist in School Psychology to provide support to Richardson ISD's staff including, but not limited to, educational assessment, report writing, and attendance of ARD meetings through March 18, 2024.

Part F: Cumulative Purchases - Information Only

Cumulative Purchases from Qualified Vendors:

BUY BOARD - Texas Association of School Boards

CCGPF - Collin County Governmental Purchasing Forum

CPGPC - Choice Partners

DIR - State of Texas Department of Information Resources

EPCNT - Education Purchasing Cooperative of North Texas

ESC - Educational Service Center

SOURCEWELL - Sourcewell (previously NJPA)

MULTI-REGION Purchasing Cooperative

OMNIA Partners - TCPN/IPA/US Communities

PPPCP - Prospering Pals

TIPS - The Interlocal Purchasing System

TPASS - Texas Procurement and Support Services

EQUALIS

D. Schedule of Upcoming Bids 35
Information Item

E. Bond Expenditure Report 37
Information Item

F. Monthly Financial Statements 41
Information Item

G. Budget Status Report 51
Action Item

H. Quarterly Investment Report 58
Action Item

I. Adoption of Board Policies: 83
1. FEC (LOCAL) - Attendance: Attendance for Credit
2. EI (LOCAL) - Academic Achievement
3. EIE (LOCAL) -Academic Achievement: Retention and Promotion

4. EHB (LOCAL) - Curriculum Design: Special Programs
5. EHBAA (LOCAL) - Special Education: Identification, Evaluation and Eligibility
6. FNG (LOCAL) - Student Rights and Responsibilities: Student and Parent Complaints/Grievances
7. DGBA (LOCAL) - Employee Complaints/Grievances
8. FFAC (LOCAL) - Wellness and Health Services: Medical Treatment

Action Item

V. ACTION / INFORMATION ITEMS

A. Consider Gifts 123
Action Item

B. Ratify Client Service Agreement with the United States Conference of Catholic Bishops for Services to Refugee and Asylee Students 125
Action Item

C. Ratify User Access Agreement with the Texas Department of Public Safety 127
Action Item

D. Ratify Maintenance Agreement and Current Expenditures with IdentiSys, Inc. 129
Action Item

E. Adoption of 2025-2026 Academic Calendar 131
Action Item

F. Approval of Culture of Voting Resolution 143
Action Item

G. Salary and Compensation Update 145
Information Item

H. 24-25 Recommended Budget Reductions: Project Rightsize 171
Information Item

I. Discussion of Legislative Issues
Information Item

J. Discussion of Student / District Activities
Information Item

K. Discussion of Upcoming Events
Information Item

L. Discussion of Recently Attended or Upcoming Conferences and Meetings
Information Item

M. Proposal of Future Agenda Items
Information Item

VI. CLOSED MEETING

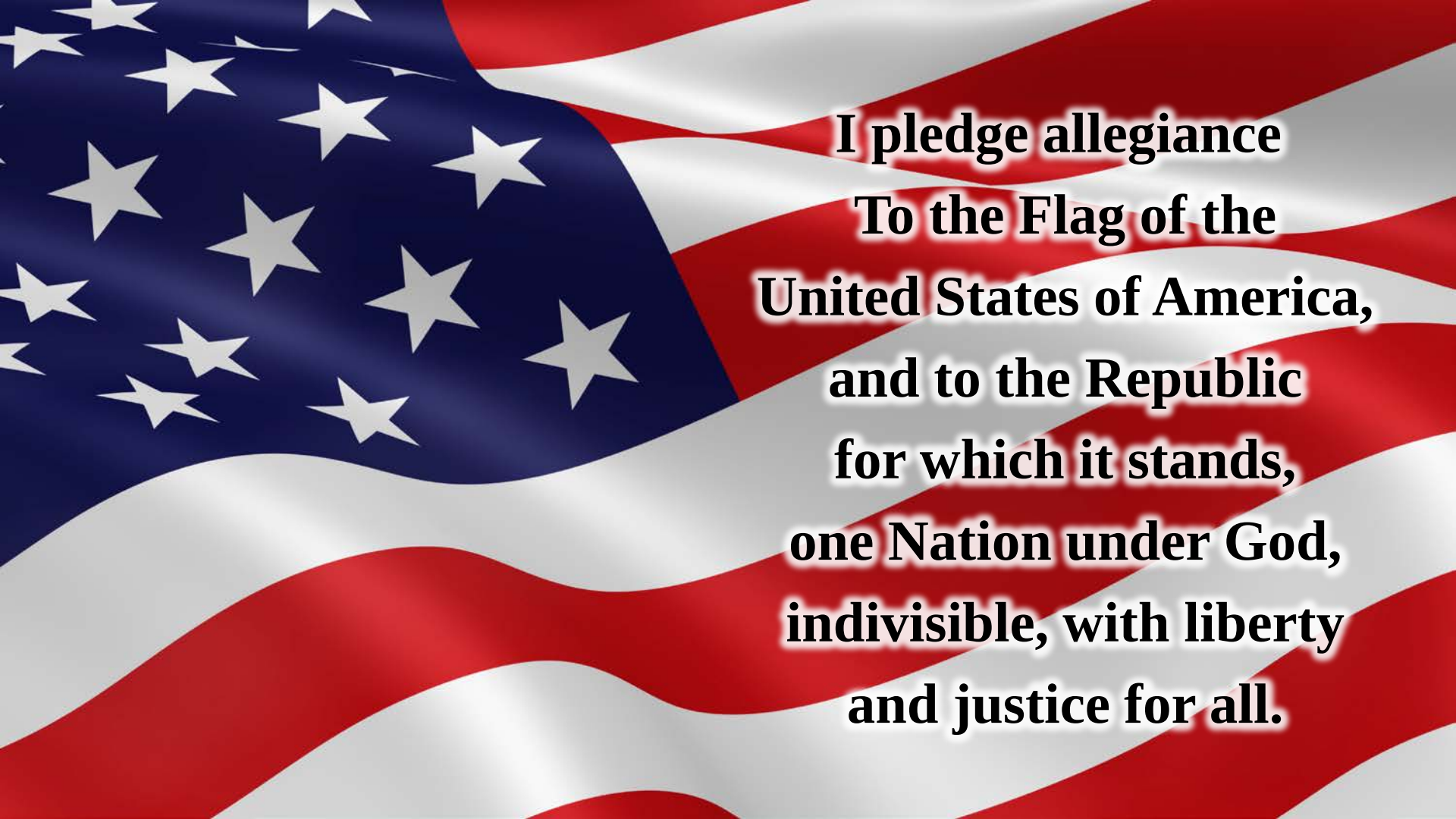
If, during the course of the meeting, the Board of Trustees should determine that a closed session is required, the Board will conduct a closed meeting in accordance with the Texas Open Meetings Act, Texas Government Code, including but not limited to Section 551.071-Consultation with Attorney; 551.072 - Deliberating regarding Real Property and 551.074 - Personnel Matters and Duties of Public Officer.

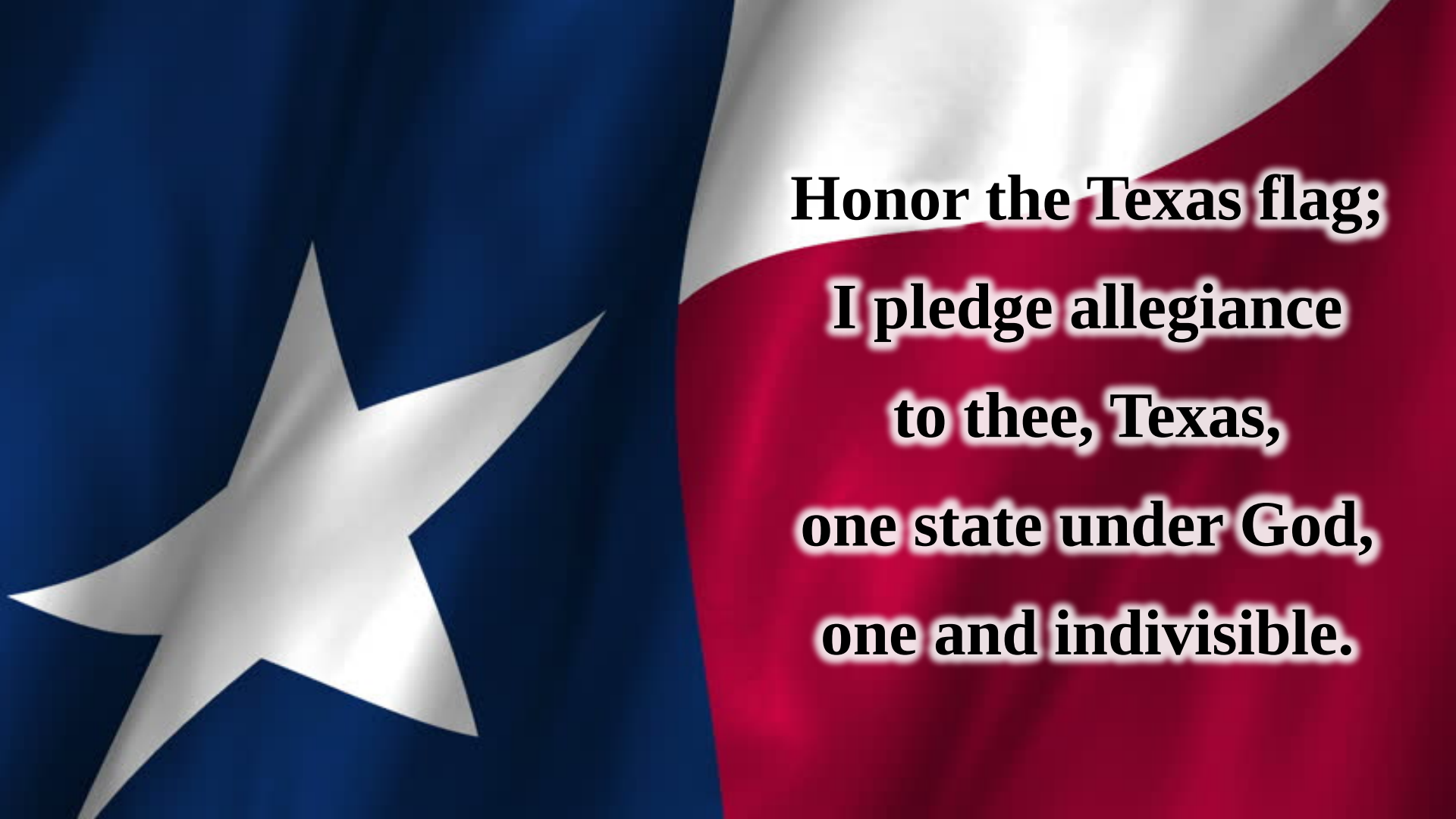
VII. RECONVENE

Open Meeting to vote on matters considered in Closed Meeting, if applicable.

VIII. **ADJOURNMENT**

If, during the course of the meeting, discussion of any item on the agenda should be held in a closed meeting, the board will conduct a closed meeting in accordance with the Texas Open Meetings Act, Government Code, Chapter 551, Subchapters D and E or Texas Government Code section 418.183(f). Before any closed meeting is convened, the presiding officer will publicly identify the section or sections of the Act authorizing the closed meeting. All final votes, actions, or decisions will be taken in open meeting. [*See* BEC(LEGAL)]


I pledge allegiance
To the Flag of the
United States of America,
and to the Republic
for which it stands,
one Nation under God,
indivisible, with liberty
and justice for all.


Honor the Texas flag;
I pledge allegiance
to thee, Texas,
one state under God,
one and indivisible.

BOARD OF TRUSTEES
Richardson Independent School District
Richardson, Texas

Date: February 22, 2024

Department: Accountability and Continuous Improvement

Submitted by: Tabitha Branum, Superintendent
Jacob Cortez, Executive Director of Assessment and Accountability

PUBLIC HEARING / ACTION ITEM

PUBLIC HEARING: 2022-2023 RISD Annual Performance Report

BACKGROUND INFORMATION: In accordance with § 39.306 of the Texas Education Code, the Board of Trustees of the Richardson Independent School District shall publish an annual report describing the educational performance of the district and of each campus in the district that includes uniform student performance and descriptive information as described in the statute and additional rules issued by the Commissioner of Education. The 2022-2023 Richardson Independent School District Annual Performance Report (RISD Annual Performance Report) is comprised of a compilation of information provided directly by the Texas Education Agency as well as some customized RISD reports. Contained in the annual report documents are the Texas Academic Performance Reports (TAPR) for the district and for each campus, the improvement plans for the district and each campus, and other district-developed reports which communicate information pertinent to district goals and expectations.

The Board of Trustees shall hold a hearing for public discussion of this report. The district provided notice of the public hearing to property owners and parents/guardians of district students through the district website. After the hearing, the report shall be widely disseminated within the district. A copy of these reports will be distributed via the RISD website. Principals and organizational managers will make the RISD Annual Performance Report available for preview at any time during school/office hours. Additional copies of the report may be reviewed and/or purchased at the Office of Records Management.

SUPERINTENDENT'S RECOMMENDATION:

The Superintendent recommends that the Board of Trustees of the Richardson Independent School District approve the 2022 – 2023 Annual Performance Report.

RESOLUTION

WHEREAS, each local educational agency (LEA) shall publish an annual report describing the educational performance of the district and of each campus in the district as provided under Section 39.306 of the Texas Education Code; and

WHEREAS, the Board of Trustees shall hold a hearing for public discussion of the report; and

WHEREAS, after the hearing, the report shall be widely disseminated within the district; and

WHEREAS, the Board of Trustees' goals clearly articulate high academic expectations and opportunities for student engagement, delivery of a profound curriculum designed to extend the learning of all students, high performing, student-focused teachers, and effective District operations with information about these goals included in this report;

THEREFORE, BE IT RESOLVED that the Board of Trustees of the Richardson Independent School District approves the 2022-2023 Richardson Independent School District Annual Performance Report.

BOARD OF TRUSTEES
RICHARDSON INDEPENDENT SCHOOL DISTRICT

Procedures for Public Comments During Board Meetings

The Board of Trustees of the Richardson Independent School District welcomes members of the public to its meetings. The purpose of meetings is to allow trustees to conduct the business of the District. Although Board meetings are held in public, they are not public meetings and the public does not have a right to participate except as provided by the Board. The Board offers a limited open forum at meetings through its Public Comment Sections to provide opportunities for members of the public to convey information to the Board.

The Board adopted the following procedures concerning public comments to facilitate the efficient operation of meetings:

Public Comment Section

- The Board of Trustees will include a Public Comment Section on the posted Agenda for each meeting. The Board holds regular monthly business meetings each month of the year, excluding July. Business meetings typically are scheduled for the first Thursday of the month. The Board schedules work sessions to address topics of study or as other needs arise. The Board reserves the third Thursday of each month for work sessions, but they also may be scheduled at any other time when a need arises. The Board reserves the right to schedule or reschedule meetings as necessary to meet the operational needs of the District. A written Agenda is posted for each Board meeting at least 72 hours before the meeting is scheduled. If an Emergency Meeting is authorized, an agenda will be posted at least one hour before the meeting is scheduled.

The Public Comment Section for agenda-related topics ordinarily will be placed on the Agenda just prior to the first business item on the Agenda. Where appropriate for efficient meeting management, the section for comments related to non-agenda topics may be placed on the Agenda after other action and information items. A speaker who attempts to address a non-agenda related topic during any period reserved for agenda-related topics is engaging in disruptive behavior. The speaker must stop his or her comments when directed.

- When necessary for effective meeting management, to accommodate large numbers of individuals wishing to address the Board at a meeting, or when otherwise advisable to accommodate specific circumstances, the Board delegates to the presiding officer the authority to make adjustments to these public comment procedures. Such adjustments may include, without limitation, adjusting when public comment will occur during a meeting, reordering agenda items, deferring public comment on non-agenda items, continuing an agenda item to a later meeting, temporarily revising public comment procedures as necessary if a meeting is conducted via videoconference, providing expanded opportunity for public comment, or establishing an overall time limit for public comments and adjusting the time allotted to each speaker.

Speaker Topics

- Regular Business Meetings. Speakers may comment on specific Agenda items, as well as matters not on the posted Agenda (i.e. non-agenda items), during the Public Comment Section at regular business meetings.

- Work Sessions or Other Called Meetings. Speakers may comment only on specific agenda items during the Public Comment Section at work sessions and other called meetings.

- Public Hearings. When RISD gives notice of a public hearing, speakers may complete a separate online public comment form for the public hearing. Speakers may only comment on the specific topic noticed for the public hearing. All other rules noted herein apply to comments during a public hearing.

Public Comment Form

- Persons wishing to address the Board must complete an online Public Comment form by signing up at the designated registration form link on the District's website beginning when the meeting agenda is posted through 12:00 p.m. on the day of the meeting. RISD will not accept submissions after 12:00pm on the posted meeting date. Persons wishing to speak must complete the designated registration form in full and be present at the meeting to make his/her own comments during the designated time for Public Comment to be eligible to speak. Any registered speaker who is absent from the meeting at the time for Public Comment forfeits the opportunity to address the Board at that meeting.

- In addition to identifying information, each speaker must indicate the specific Agenda item about which he or she wishes to comment and/or identify the non-Agenda topic of the comments.

- If RISD gives notice of a public hearing, it will provide a separate designated registration form link on the District's website for the public hearing that persons who wish to speak must complete. Individuals will be able to register beginning when the meeting agenda for

the public hearing is posted through 12:00 p.m. on the day of the meeting. RISD will not accept comment cards after 12:00pm on the posted meeting date.

- Persons who do not have access to a computer to complete the Public Comment form online may contact the Board Office at 469-593-0403 for assistance. The online form is required to be completed by no later than 12:00 pm on the day of the posted meeting.

Written Materials

- A speaker who wishes to provide written materials to the Board of Trustees must bring at least nine (9) copies of the materials to the Board meeting. A copy of the materials will be provided to the trustees before the speaker is called. The speaker may not distribute materials when he or she is called to speak.

Time

- Each speaker is limited to a total of three* minutes and a speaker may not use time of another speaker to extend his or her comment period. Note: A speaker who addresses the Board through a translator will have six* minutes to present comments to ensure that non-English speakers receive the same opportunity to address the Board.

- Staff will set a three*-minute digital timer for each speaker. The speaker shall end his or her comments when the timer expires. Any speaker who fails to stop speaking and yield the podium at the end of his or her allotted time is considered out of order and may be escorted from the podium and/or asked to leave the meeting.

(*Unless the comment period has been limited as provided herein.)

Single comment

- A speaker may complete one online Public Comment form for each meeting. A speaker who comments during a public hearing is not ineligible to speak during the regular public comment period.

Protocol for Speakers

- The Board Secretary will call the name of each speaker who has submitted a public comment card and state the topic(s) on which the individual has registered to speak.

- Each speaker should approach the podium when his or her name is called. An adjustable microphone is affixed to the podium in the Auditorium. The speaker should clearly state his or her name and the school or school(s) the speaker's children attend or have attended before beginning to comment.

- The Board will not engage in dialogue with a speaker. Specific factual information or reference to an existing policy may be furnished in response to inquiries or statements. The Board cannot deliberate or make a decision on any subject that is not on the Agenda.

- The public comment period is not the appropriate forum for presentation of formal complaints. RISD maintains a formal grievance policy to address complaints. The Board will only consider formal complaints that remain unresolved after they have been addressed through proper administrative channels and when they have been placed on the Agenda. Attacks of a personal nature against Board members, RISD staff, students, or other citizens by name or unique title will not be allowed or tolerated. Speakers who wish to make a complaint regarding an employee should comply with the appropriate complaint policy. (DGBA – Employee Complaints; FNG – Student/Parent Complaints; GF – Public Complaints). Complaint policies are available on the RISD website.

- Remarks or other conduct that disrupt the meeting are considered out of order and will not be allowed. Visitors and staff must listen quietly and respectfully during the public comment section whether they agree or disagree with a speaker's message. It is not appropriate for staff or visitors to clap, cheer, boo, display banners, or otherwise engage in disruptive conduct. Persons who disrupt the meeting will be cautioned to observe meeting rules. Persons who persist in disrupting the meeting may be removed from the meeting.

Consent for Online Publication

RISD may audio and video record its meetings. A person who chooses to speak during the Public Comment Section is consenting to the online audio/video publication of his or her comments.

Reasonable Accommodation and Translation

Persons desiring to make a public comment who need reasonable accommodations of a disability or who require a language translator should contact the Board office at 469-593-0403 in advance of the meeting to request assistance.

Approved: September 15, 2022

JUNTA DIRECTIVA
DISTRITO ESCOLAR INDEPENDIENTE DE RICHARDSON

Procedimientos para los comentarios del público durante las reuniones de la Junta Directiva

La Junta Directiva del Distrito Escolar Independiente de Richardson da la bienvenida a los miembros del público a sus reuniones. El propósito de las reuniones es permitir a los miembros de la Junta conducir los negocios del Distrito. Aunque las reuniones de la Junta Directiva se celebran en público, no son reuniones públicas y el público no tiene derecho a participar, salvo lo dispuesto por la Junta. La Junta ofrece un foro abierto limitado en las reuniones a través de su Sección de Comentarios Públicos para proporcionar oportunidades a los miembros del público para transmitir información a la Junta.

La Junta Directiva adoptó los siguientes procedimientos relativos a los comentarios del público para facilitar el funcionamiento eficiente de las reuniones:

Sección de comentarios del público

- La Junta Directiva incluirá una sección de comentarios del público en el orden del día de cada reunión. La Junta celebra reuniones mensuales de trabajo todos los meses del año, excepto julio. Las reuniones de trabajo suelen celebrarse el primer jueves de cada mes. La Junta Directiva programa sesiones de trabajo para tratar temas de estudio o cuando surgen otras necesidades. La Junta se reserva el tercer jueves de cada mes para las sesiones de trabajo, pero también pueden programarse en cualquier otro momento cuando surja una necesidad. La Junta se reserva el derecho de programar o reprogramar las reuniones según sea necesario para satisfacer las necesidades operativas del Distrito. Se publica una agenda por escrito para cada reunión de la Junta Directiva al menos 72 horas antes de su realización. Si se autoriza una reunión de emergencia, se publicará una agenda al menos una hora antes de la fecha de la reunión.

La sección de comentarios del público para los temas relacionados con la agenda se incluirá normalmente en la agenda justo antes del primer punto de la misma. Cuando sea conveniente para una gestión eficaz de la reunión, la sección de comentarios relacionados con temas no incluidos en la agenda podrá incluirse después de otros puntos de acción e información. Un orador que intente abordar un tema no relacionado con la agenda durante cualquier período reservado para los temas relacionados con la agenda está incurriendo en un comportamiento perturbador. El orador deberá interrumpir sus comentarios cuando se le indique.

- Cuando sea necesario para la gestión eficaz de la reunión, para dar cabida a un gran número de personas que deseen dirigirse a la Junta en una reunión, o cuando sea aconsejable para adaptarse a circunstancias específicas, la Junta delega en el presidente la autoridad para hacer ajustes a estos procedimientos de comentarios del público. Dichos ajustes pueden incluir, sin limitación, la adaptación del momento en que se producirán los comentarios del público durante una reunión, la reordenación de los puntos del orden del día, el aplazamiento de los comentarios del público sobre los puntos no incluidos en el orden del día, la continuación de un punto del orden del día para una reunión posterior, la revisión temporal de los procedimientos de comentarios del público según sea necesario si una reunión se lleva a cabo a través de videoconferencia, la ampliación de las oportunidades para los comentarios del público, o el establecimiento de un límite de tiempo general para los comentarios del público y el ajuste del tiempo asignado a cada orador.

Temas de los oradores

- Reuniones ordinarias de trabajo. Los oradores podrán hacer comentarios sobre puntos específicos de la agenda, así como sobre asuntos que no figuren en la agenda (es decir, puntos no incluidos en la agenda), durante la sección de comentarios del público en las reuniones ordinarias de trabajo.

- Sesiones de trabajo u otras reuniones convocadas. Los oradores sólo pueden comentar puntos específicos de la agenda durante la sección de comentarios del público en las sesiones de trabajo y otras reuniones convocadas.

- Audiencias públicas. Cuando RISD notifica una audiencia pública, los oradores pueden completar un formulario de comentarios públicos en línea separado para la audiencia pública. Los oradores sólo pueden hacer comentarios sobre el tema específico anunciado para la audiencia pública. Todas las demás normas indicadas aquí se aplican a los comentarios durante una audiencia pública.

Formulario de comentarios públicos

- Las personas que deseen dirigirse a la Junta deben llenar un formulario de comentarios públicos en línea inscribiéndose en el enlace del formulario de registro designado en la página web del Distrito a partir del momento en que se publique la agenda de la reunión y hasta las 12:00 p.m. del día de la reunión. RISD no aceptará presentaciones después de las 12:00 p.m. de la fecha de la reunión publicada. Las personas que deseen hacer uso de la palabra deben completar el formulario de registro designado en su totalidad y estar presentes en la reunión para hacer sus propios comentarios durante el tiempo designado para los Comentarios Públicos para tener derecho a hablar. Cualquier orador registrado que se ausente de la reunión a la hora de los Comentarios Públicos perderá la oportunidad de dirigirse a la Junta en esa reunión.

- Además de la información de identificación, cada orador debe indicar el punto específico del orden del día sobre el que desea

comentar y/o identificar el tema no incluido en el orden del día de los comentarios.

- Si RISD avisa de la celebración de una audiencia pública, proporcionará un enlace a un formulario de registro designado por separado en el sitio web del Distrito para la audiencia pública que las personas que deseen intervenir deberán rellenar. Las personas podrán inscribirse a partir del momento en que se publique el orden del día de la audiencia pública hasta las 12:00 horas del día de la reunión. El RISD no aceptará tarjetas de comentarios después de las 12:00 p.m. de la fecha de la reunión anunciada.

- Las personas que no tengan acceso a una computadora para completar el formulario de comentarios públicos en línea pueden comunicarse con la Oficina de la Junta al 469-593-0403 para obtener ayuda. El formulario en línea debe completarse antes de las 12:00 p.m. del día de la reunión publicada.

Materiales escritos

Un orador que desee proporcionar materiales escritos a la Junta Directiva debe traer al menos nueve (9) copias de los materiales a la reunión de la Junta. Se proporcionará una copia de los materiales a los miembros de la Junta antes de que el orador sea convocado. El orador no podrá distribuir materiales cuando sea llamado a hablar.

Tiempo

- Cada orador está limitado a un total de tres* minutos y un orador no puede utilizar el tiempo de otro orador para extender su período de comentarios. Nota: Un orador que se dirija a la Junta a través de un traductor dispondrá de seis* minutos para presentar sus comentarios a fin de garantizar que las personas que no hablan inglés tengan la misma oportunidad de dirigirse a la Junta.

- El personal pondrá un reloj digital de tres* minutos para cada orador. El orador terminará sus comentarios cuando el tiempo expire. Cualquier orador que no deje de hablar y ceda el podio al final de su tiempo asignado se considerará fuera de lugar y podrá ser escoltado del podio y/o se le pedirá que abandone la reunión.

(*A menos que el período de comentarios se haya limitado según lo dispuesto en el presente documento).

Un solo comentario

Un orador puede completar un formulario de comentarios públicos en línea para cada reunión. Un orador que comente durante una audiencia pública no podrá intervenir durante el periodo de comentarios públicos regular.

Protocolo para los oradores

- La secretaria de la Junta llamará por su nombre a cada orador que haya presentado una tarjeta de comentarios públicos e indicará el tema o temas sobre los que se ha inscrito para hablar.

- Cada orador deberá acercarse al podio cuando se diga su nombre. En el podio del Auditorio hay un micrófono ajustable. El orador debe decir claramente su nombre y la escuela o escuelas a las que asisten o han asistido sus hijos/as antes de comenzar a comentar.

- La Junta no entablará un diálogo con el orador. En respuesta a las preguntas o declaraciones, se puede proporcionar información específica sobre los hechos o hacer referencia a una política existente. La Junta no puede deliberar ni tomar una decisión sobre ningún tema que no figure en la agenda.

- El período de comentarios públicos no es el foro apropiado para la presentación de quejas formales. El RISD mantiene una política de quejas formales para atenderlas. La Junta sólo considerará las quejas formales que queden sin resolver después de que se hayan abordado a través de los canales administrativos adecuados y cuando se hayan incluido en el orden del día. No se permitirán ni tolerarán los ataques de carácter personal contra los miembros de la Junta, el personal de RISD, los estudiantes u otros ciudadanos por su nombre o título. Los oradores que deseen presentar una queja sobre un empleado deberán cumplir con la política de quejas correspondiente. (DGBA - Quejas de empleados; FNG - Quejas de estudiantes/padres; GF - Quejas del público). Las políticas de quejas están disponibles en la página web de RISD.

- Los comentarios u otras conductas que perturben la reunión se consideran fuera de lugar y no se permitirán. Los visitantes y el personal deben escuchar en silencio y con respeto durante la sección de comentarios del público, tanto si están de acuerdo como si no lo están con el mensaje del orador. No es apropiado que el personal o los visitantes aplaudan, chiflen, abucheen, muestren pancartas o adopten cualquier otra conducta perturbadora. Las personas que perturben la reunión serán amonestadas para que respeten las normas de la misma. Las personas que persistan en perturbar la reunión podrán ser expulsadas de la misma.

Consentimiento para la publicación en línea

RISD puede grabar sus reuniones en audio y vídeo. Una persona que elija hablar durante la Sección de Comentarios Públicos está consintiendo la publicación en línea de sus comentarios en audio y video.

Acomodación razonable e interpretación

Las personas que deseen hacer un comentario público y que necesiten adaptaciones razonables de una discapacidad o que requieran un traductor de idiomas deben ponerse en contacto con la oficina de la Junta al 469-593-0403 antes de la reunión para solicitar asistencia.

Aprobado: jueves, 15 de septiembre de 2022

BOARD OF TRUSTEES
Richardson Independent School District
Richardson, Texas

Date: February 22, 2024

Department: Board of Trustees Office

Submitted by: Viri Gutierrez, Administrative Manager - Board Relations

ACTION ITEM

TOPIC: **Minutes of January 18, 2024 Board Meeting**

BACKGROUND INFORMATION

Minutes recorded on above date(s).

SUPERINTENDENT'S RECOMMENDATION

The Superintendent recommends that the Board of Trustees approve the minutes of the 2024 meeting(s) listed above.

RICHARDSON INDEPENDENT SCHOOL DISTRICT
Board of Trustees
January 18, 2024

The Board of Trustees of the Richardson Independent School District met in a Regular Meeting at 6:05 P.M. in the Administration Building, 400 South Greenville Avenue, Richardson, Texas with the following present: Ms. Regina Harris, President; Mrs. Debbie Renteria, Vice President; Mr. Chris Poteet, Secretary; Mr. Eric Eager, Mrs. Vanessa Pacheco, and Mrs. Megan Timme. As well as Mrs. Tabitha Branum, Superintendent; Mr. Mike Jasso, Chief of Staff; Ms. Leticia McGowan, General Counsel; Mrs. Sandra Hayes, Assistant Superintendent of Operations; Mr. David Pate, Assistant Superintendent of Finance and Support Services; Dr. Melissa Heller, Assistant Superintendent of Strategy and Engagement; Mr. Henry Hall, Assistant Superintendent of Technology; Dr. Chris Goodson, Assistant Superintendent of Human Resources and Dr. Matthew Gibbins, Assistant Superintendent of Administrative Services.

Present

Ms. Rachel McGowan

Absent

Ms. Harris welcomed Mrs. Desiree Cantu, Executive Assistant for Student Services to help lead the pledges of allegiance.

Pledges of Allegiance

Dr. Melissa Heller presented the recognitions listed below.
The Board recognized the following:

Recognitions

Special Recognition and Appreciation

- RISD Board of Trustees
- Arby's Foundation- Grant given to eliminate student lunch debt

Staff Recognitions

- National Board Certified Teachers:
  - Denisse Alvarado - Carolyn Bukhair Elementary
  - Alexandra Enderica - Carolyn Bukhair Elementary
  - Maria Francke - Gonzalez - Dover
  - Brian Harper - Berkner High School
  - Christine Liou - iTeam
  - Jennier McEvoy Washington - Carolyn Bukhair Elementary
  - Bobbie Weir - Richardson High School

Student Recognitions

- The Gates Scholarship:
  - Berkner High School -Anthony Jaimez
  - Pearce High School - Luisa Lara
  - Richardson High School - Mehak Polani, Yared Alem
- Academic All - State Football Athletes:
  - Lake Highlands High School - Will Copple, Dylan Dubuclet, Gage Dunn, Shep Jenkins, Tripp Marshall, Speight Nickle, Connor Whitmire
  - Pearce High School - Parker Berry, Benjamin Bidan, Colin Dennis, Quinn Fleming, Holland Forrester, Evan Grimsley, Jack Lokey, Ray Long, Lexi Martin, Jack McGarry, Karina Medina, Noelle Napier, Tate Navin, Brooke Rodriguez, Rhett Sawyer, Noah Self, Kylee Sherman, Allie Sisco, Ryan Williams, Clark Wilson
  - Richardson High School - Jacob Breazeale, Mark Gold, Leon Kroener, Mohammad Yakin

RISD Believes Student Award

- Alex Rodezno - 6th Grade - Yale Elementary

RISD Believes Staff Award

- Savannah Hollis and Shannon Ragsdale - Richardson ISD Healthcare Academy

The following persons addressed the board during the regular comment section:

Public Comments

- Randy Blankenship - Donated Books and Department of Equity, Diversity & Inclusion
- Euan Blackman - Board Policies

A motion was made by Chris Poteet and seconded by Eric Eager to approve the consent agenda as follows:

No. 8931
Consent Agenda

- Minutes of December 14 and December 21, 2023 Meetings
- Human Resources Report
- Recommended Specified Bids, Contracts, and Cumulative Purchases:

Action/Information Item
Part A: New Bids - For Approval
Miscellaneous Consultant Services
Multi-Campus Fire Alarm Replacement
Commercial Reach-In Cooler and Freezer Replacements
Online Subscriptions including Curriculum Delivery and other Online Delivery Services
Part B: Bid Renewals - For Approval
Full-Service Delivery of Fresh Produce
Part C: Contract Information (Greater than $100,000) - For Approval
ESS South Central - Substitute Staff Placement (Equalis Contract #R10-1105C)
Interior Resource Group - Phase IIB Furniture PHS (multiple cooperatives)
Offen Petroleum LLC - Bus and Fleet Bulk Fuel (TCCPP 2023-070)
County of Dallas - Joint election cost, May 4, 2024.
Cloud Ingenuity - Visitor management system 3 years - (TIPS #230105)
TNTP - Multilingual Learner-Focused Training and Support ending June 30, 2024 (RISD # 21-129) - Authority to approve, negotiate, and enter into a contract
Part D: Interlocal Agreements, Memorandums of Understanding, and Other - For Approval
Interlocal Agreements:
Region 10 ESC - Texas Reading Initiative
Memorandums of Understanding:
University of North Texas at Dallas - Field Placement (3-year term)
Other:
Update Here
Part E: Contracts, Contract Modifications & Change Orders: Less than $100,000 (Information Only)
Heather Lyn Towell - to provide support to Richardson ISDs Evaluation staff including but not limited to educational assessment, report writing, and attendance of ARD meeting through May 24, 2024.
Part F: Cumulative Purchases - Information Only
Cumulative Purchases from Qualified Vendors:
BUY BOARD - Texas Association of School Boards
CPGPC - Choice Partners
CTPA - Central Texas Purchasing Association
DIR - State of Texas Department of Information Resources
EPCNT - Education Purchasing Cooperative of North Texas
SOURCEWELL - Sourcewell (previously NJPA)
OMNIA Partners - TCPN/IPA/US Communities
PPPCP - Prospering Pals
TCCPP - Tarrant County Cooperative Purchasing Program
TIPS - The Interlocal Purchasing System
TPASS - Texas Procurement and Support Services
EQUALIS

- Schedule of Upcoming Bids
- Bond Expenditure Reports (2016 & 2021)
- Budget Status Report
- Monthly Financials Statements
- TEA LASO Cycle II Notice of Application

The motion passed 6-0

Regina Harris, Debbie Renteria, Chris Poteet, Eric Eager, Megan Timme, Vanessa Pacheco — Yeas
None — Nays

Mr. Pate presented the following gifts of $5,000 or more: — No. 8932 Gifts Report

- NWHE PTA donated $5,039.63 for a fieldtrip and student headphones
- Randy Blankenship donated $5,961.64 for supplemental books for schools

A motion was made by Debbie Rentería and seconded by Eric Eager, to approve the resolution whereas, the Board of Trustees has considered the gifts of $5,000 or more as listed above; and whereas, ensuring timely and accurate financial record keeping supports the Board's Strategic Objectives and Strategies; therefore be it resolved, that the Board of Trustees of the Richardson Independent School District accepts the gifts of $5,000 or more as presented and approves amending the District's overall budget to reflect receipt of the monetary gifts

The motion passed 6-0

Regina Harris, Chris Poteet, Debbie Renteria, Eric Eager, Megan Timme, Vanessa Pacheco None	Yeas Nays
A motion was made by Chris Poteet and seconded by Megan Timme, to approve the resolution whereas, the Board of Trustees, consistent with the requirement to maintain proper contract compliance; and whereas, the district seeks to negotiate, enter into, and ratify an agreement with vendor; Be it therefore resolved, that the Board of Trustees of the Richardson Independent School District hereby approves the Administration negotiate, enter into, and ratify the agreement with Agile Sports Technologies. The motion passed 6-0.	No. 8933 Approval to Enter into Contract and Ratify - Agile Sports Technologies
Regina Harris, Chris Poteet, Debbie Renteria, Eric Eager, Megan Timme, Vanessa Pacheco None	Yeas Nays
A motion was made by Megan Timme and seconded by Vanessa Pacheco to approve the resolution whereas, the Board of Trustees, consistent with the requirement to maintain proper contract compliance; and whereas, the district has facilitated an agreement with vendor; Be it therefore resolved, that the Board of Trustees of the Richardson Independent School District hereby approves and ratifies the contract agreement and DPA agreement with Data Keeper Technologies. The motion passed 6-0.	No.8934 DataKeeper Technologies
Regina Harris, Chris Poteet, Debbie Renteria, Eric Eager, Megan Timme, Vanessa Pacheco None	Yeas Nays
A motion was made by Vanessa Pacheco and seconded by Eric Eager to approve the resolution whereas, the Board of Trustees, consistent with the requirement to maintain proper contract compliance; and whereas, the district has facilitated an agreement with vendor; Be it therefore resolved, that the Board of Trustees of the Richardson Independent School District hereby approves and ratifies the contract agreement with The Texas State Library & Archives Commission's TexQuest Program. The motion passed 6-0.	No.8935 TexQuest Program
Regina Harris, Chris Poteet, Debbie Renteria, Eric Eager, Megan Timme, Vanessa Pacheco None	Yeas Nays
A motion was made by Debbie Rentería and seconded by Eric Eager, to approve the resolution whereas, the term of office for Board of Trustee members aligned with Single Member Districts 1, and At - Large Place 7, will expire this year; and whereas, the Board of Trustees must call regular elections no later than 78 days before the election will be held; and whereas, holding the trustee elections with the countywide general election and contracting with Dallas County Elections Department to conduct the election is consistent with applicable law and will allow the District to realize cost savings and other efficiencies which support the Board's strategic parameter to practice responsible stewardship; Therefore, be it resolved that the Board of Trustees of the Richardson Independent School District approves the Board of Trustees Election Order and Notice as presented, and as may be amended as to voting center locations by recommendation of the Dallas County Elections Department, and further authorizes the Superintendent or her designee to contract with the Dallas County Elections Department to conduct the general election as approved in the Election Order and Notice. The motion passed 6-0	No. 8936 Order and Notice for May 2024 Board Election
Regina Harris, Chris Poteet, Debbie Renteria, Eric Eager, Megan Timme, Vanessa Pacheco None	Yeas Nays
A motion was made by Chris Poteet and seconded by Vanessa Pacheco, to approve the resolution whereas, in connection with the District's strategic planning efforts to ensure future budget stability, the Administration recently identified an available tract of real property currently owned by the district, whereas, the Administration inspected the property and determined it would be suitable to sell; Therefore, be it resolved that the Board of Trustees hereby authorizes the Superintendent or her designee to cause to be publish the required legal notice for the sale of 401 S. Sherman St. as outlined in Local Government Code, Section 272.001; Authorizes the Administration to negotiate and enter into a contract for the sale of	No. 8937 Authority to Publish Required Legal Notice and Negotiate Contract to Sell Real Property: 401 S. Sherman St.,

401 S. Sherman St.; And authorizes District staff and the Board President to take such actions necessary to execute such documents as required to sell said real property. The motion passed 6-0	Richardson, TX 75081
Regina Harris, Chris Poteet, Debbie Renteria, Eric Eager, Megan Timme, Vanessa Pacheco None	Yeas Nays
A motion was made by Megan Timme and seconded by Chris Poteet, to approve the resolution whereas, Section 23.001 of the Texas Education Code permits the district to either employ or accept as a volunteer a chaplain to provide support, services, and programs for students as assigned by the Board; Whereas, Senate Bill 763, passed by the 88th Texas Legislature, requires each school board to take a record vote between September 1, 2023, and March 1, 2024, on whether to adopt a policy authorizing a campus of the district to employ or accept as a volunteer a chaplain under Education Code Chapter 23; Whereas, the Richardson Independent School District welcomes volunteers in our schools and recognizes the vital role a volunteer plays in supporting the educational experience of students. Interested individuals can volunteer through various district and school-based programs, including Parent Teacher Associations, Campus Advisory Councils, and other campus and school-based volunteer opportunities. Now, therefore, be it resolved that the Board of Trustees of the Richardson Independent School District hereby affirms the practice of a district campus permitting any community members who meet requirements, including chaplains, to volunteer to provide support, services, and programs for students in accordance with the district's existing GKG policy and declines to expand our current support, services, or programs under Chapter 23 of the Texas Education Code. Volunteers shall not be used to replace the position or functions of salaried professional or paraprofessional employees. Be it further resolved that the Richardson Independent School District does not authorize hiring chaplains for counselors or mental and behavioral health roles. An individual who is a chaplain remains eligible for hire if they meet the requirements and credentials that the district has set forth for a position, and they are deemed the best candidate. All policies, regulations, and procedures would be applicable to those positions. As required by Senate Bill 763, board members were polled for a record vote audibly stating their vote on this motion. The motion passed 6-0	No. 8938 Chaplain Resolution Pursuant to Texas Education Code, Chapter 23
Regina Harris, Chris Poteet, Debbie Renteria, Eric Eager, Megan Timme, Vanessa Pacheco None	Yeas Nays
Mrs. Harris announced that the Board would take a brief break 7:10 PM and resumed at 7:13 PM.	Break
Mr. Mike Jasso, Chief of Staff, presented information about the proposed 2025-2026 Academic Calendar, which included information regarding the requirements, considerations, timeline and next steps. .	2025 - 2026 Academic Calendar
Mrs. Hayes introduced Georgia Leonard, from Davis Demography, to present an update to the Demography Report for 2023-2024. Information and overall key factors of the report included: ● Mobility factors - 2020-2023 ● Residential development ● Projected student population in the next five years	District Demography Report 2023-2024
Ms. Leticia McGowan, General Counsel, presented a review and discussion regarding updates to the following Board Policies: ● FEC (LOCAL) - Attendance: Attendance for Credit, EI (LOCAL) - Academic Achievement, EIE (LOCAL) - Academic Achievement: Retention and Promotion, EHB (LOCAL) Curriculum Design: Special Programs, EHBAA (LOCAL) - Special Education: Identification, Evaluation and Eligibility, FNG (LOCAL) - Student Rights and Responsibilities: Student and Parent Complaints/ Grievances, DGBA (LOCAL)- Employee Complaints/Grievances, FFAC (LOCAL) - Wellness and Health Services: Medical Treatment, EF (LOCAL) - Instructional Resources, EFA (LOCAL) - Instructional Resources: Instructional Materials, EFB (LOCAL) - Instructional Resources: Library Materials	Review and Discussion of Board Policies: FEC (LOCAL), EI (LOCAL), EIE (LOCAL), EHB (LOCAL), EHBAA (LOCAL), FNG (LOCAL), DGBA (LOCAL), FFAC (LOCAL), EF (LOCAL), EFA (LOCAL), EFB (LOCAL)
Sandra Hayes, Assistant Superintendent of Operations, provided an update on the Intruder Audit Reports. Wallace, O'Henry, and Carolyn Bukhair Elementary found one finding each.	Intruder Audit Report

At 9:02 PM, Ms. Haris announced that accordance to the Texas Open Meetings Act, Texas Government Code Section 551.071 - Consultation with Attorney and Section 551.074 - Duties of Public Officer the Board would enter into a closed session. Closed Session

The Board reconvened in open session having taken no action in closed session at 10:21 PM. Reconvene

Ms. Harris adjourned the meeting at 10:21 PM. on January 18, 2024. Adjournment

Approved as submitted on February 22, 2024.

_____
Chris Poteet, Secretary

_____
Regina Harris, President

BOARD OF TRUSTEES
Richardson Independent School District
Richardson, Texas

Date: **February 22, 2024**

Submitted by: Christopher B. Goodson, Ed.D.
Assistant Superintendent, Human Resources

ACTION ITEM

TOPIC: **Human Resources Report**

BACKGROUND INFORMATION

Listed on the following pages is the Human Resources Report. Part A of this report includes the appointments of professional personnel. The Assistant Superintendent of Human Resources has reviewed this report and recommends that the Board employ the individuals listed to work in the Richardson Schools during the 2023-2024 school year under the salary schedule adopted by the Board, subject to assignment and reassignment as determined by the Superintendent.

Also submitted for your information in Part B of the Human Resources Report, are appointments of paraprofessionals and classified employees, and separations of professional, paraprofessional, and classified personnel.

SUPERINTENDENT'S RECOMMENDATION

The Superintendent recommends that the Board of Trustees approve Part A of the Human Resources Report, dated February 22, 2024.

RESOLUTION

WHEREAS, the Board of Trustees has approved the appropriate budgets and staffing allocations for the Richardson Independent School District and the following recommendations fall within those guidelines; and

WHEREAS, the appointment of highly qualified, student-focused staff supports the Board's vision, values, goals, and mission;

THEREFORE, BE IT RESOLVED that the Board of Trustees of the Richardson Independent School District approves Part A of the Human Resources Report for February 22, 2024.

PART A: Proposed Personnel Actions Submitted for Board of Trustees' Approval

APPOINTMENTS OF PROFESSIONAL PERSONNEL:

ELEMENTARY

NAME	ASSIGNMENT	START DATE	ORGANIZATION
ALLEN, LAKENDRA	TEACHER	01/18/2024	THURGOOD MARSHALL ELEM
BARRETT, GRACE	TEACHER	01/08/2024	NORTHLAKE ELEMENTARY
HORNSTEIN, BRIAN	TEACHER	01/08/2024	HAMILTON PARK PACESETTER
MARKS, LAUREN	TEACHER	01/16/2024	DOBIE PRE KINDERGARTEN SCH
PAQUETTE, BREANNA	TEACHER	01/08/2024	MATH/SCIENCE/TECH MAGNET
RODRIGUEZ CARRILLO, ROBERTO	ASSOCIATE TEACHER FT	01/22/2024	RISD ACADEMY
ROSS, ANDREA	TEACHER	01/08/2024	SPRINGRIDGE ELEMENTARY
SHANKLIN, ANDREA	TEACHER	01/08/2024	STULTS ROAD ELEMENTARY
STORZ, LACI	TEACHER	01/08/2024	GREENWOOD HILLS ELEMENTARY
THOMPSON, ANIYA	TEACHER	01/08/2024	FOREST LANE ACADEMY
VALLADARES, MICHELLE	TEACHER	01/18/2024	THURGOOD MARSHALL ELEM
WILLIAMSON, MORGAN	TEACHER	01/08/2024	RICHLAND ELEMENTARY

APPOINTMENTS OF PROFESSIONAL PERSONNEL:

SECONDARY

NAME	ASSIGNMENT	START DATE	ORGANIZATION
BABB, CHERYL	TEACHER	01/08/2024	WESTWOOD: M/S/L MAGNET
CARTER, COLTON	TEACHER	01/08/2024	JJ PEARCE HIGH SCHOOL
FIGGE, PAIGE	TEACHER	01/08/2024	FOREST MEADOW JUNIOR HIGH
FRANKS, TRACELLE	TEACHER	01/08/2024	FOREST MEADOW JUNIOR HIGH
GLUCKMAN, ABBY	TEACHER	01/08/2024	RICHARDSON HIGH SCHOOL
KIES, AILEEN	TEACHER	01/08/2024	C MCAULIFFE LEARNING CTR
NISHINO, SUZUKA	TEACHER	01/08/2024	BERKNER HIGH SCHOOL
SALEH, MOHAMMAD	TEACHER	01/08/2024	JJ PEARCE HIGH SCHOOL
SHAW, JASMINE	TEACHER	01/18/2024	LAKE HIGHLANDS HIGH SCHOOL
TREVINO, MARCUS	TEACHER	01/22/2024	JJ PEARCE HIGH SCHOOL
WEST, CRYSTAL	ASSOCIATE TEACHER FT	01/08/2024	BERKNER HIGH SCHOOL

PART A: Proposed Personnel Actions Submitted for Board of Trustees' Approval Continued

CENTRAL PROFESSIONAL

NAME	ASSIGNMENT	START DATE	ORGANIZATION
None			

ADMINISTRATIVE PROFESSIONAL

NAME	ASSIGNMENT	START DATE	ORGANIZATION
BARRY, LESLIE	SPEECH THERAPIST	01/08/2024	SPECIAL STUDENT SERVICES
BOHNHOFF, RACHEL	INTERVENTIONIST	01/17/2024	PRE K 12 INTERVENTION

PART B: Personnel Actions Submitted for Board of Trustees' Information

APPOINTMENTS of Paraprofessional and Classified Personnel:

PARAPROFESSIONAL	DATE	POSITION	LOCATION
ASSIS, ALINE	01/08/2024	CAREGIVER	PRE K 12 INTERVENTION
CARREON MARTEL, LAURA	12/11/2023	SECRETARY III	PRE K 12 INTERVENTION
CARVAJAL VASQUEZ, LORENA	01/08/2024	AIDE I	PRE K 12 INTERVENTION
COURTNEY, VIOLA	01/08/2024	CAREGIVER	PRE K 12 INTERVENTION
CRAIG, CAMRYN	01/08/2024	AIDE I	PRE K 12 INTERVENTION
DAVIS, TEYA	01/11/2024	SPECIAL EDUCATION AIDE	LAKE HIGHLANDS JUNIOR HIGH
FERNANDEZ, KARINA	01/10/2024	AIDE I	MARK TWAIN ELEMENTARY
GARCIA, MARIEL	01/08/2024	AIDE I	PRE K 12 INTERVENTION
GARDNER, BRIONNA	01/23/2024	SPECIAL EDUCATION AIDE	R WEST TECH MAGNET
GONZAGA, SHEYLA	01/08/2024	CAREGIVER	PRE K 12 INTERVENTION
GONZAGA-BURNS, DAYENA	01/08/2024	CAREGIVER	PRE K 12 INTERVENTION
HERNANDEZ, AALIYAH	12/21/2023	AIDE I	SKYVIEW ELEMENTARY
HERNANDEZ, ELIZABETH	01/10/2024	AIDE I	CAROLYN G BUKHAIR ELEM
JHAVERI, DHRUVI	01/11/2024	SECRETARY III	SPECIAL STUDENT SERVICES
JOHNSON, LARANDA	01/16/2024	STUDENT DATA SPEC	YALE ELEMENTARY
LOZANO VAZQUEZ, FLOR	01/25/2024	SECRETARY I	AUDELIA CREEK ELEMENTARY
MAURICE, AMANDA	12/14/2023	HEALTH AIDE	HEALTH SERVICES
MEDELES CORTES, ELIZABETH	12/18/2023	EXECUTIVE ASSISTANT I	LIBERTY JUNIOR HIGH
RAMIREZ, GRAZIELE	01/08/2024	CAREGIVER	PRE K 12 INTERVENTION
RODARTE, BETHANEY	01/08/2024	CAREGIVER	CANYON CREEK DAYCARE
STEVENS, TIFFANY	01/08/2024	EXECUTIVE ASSISTANT I	SPRINGRIDGE ELEMENTARY
THOMAS, CORTEZ	12/20/2023	SPECIAL EDUCATION AIDE	SPECIAL STUDENT SERVICES
URIBE, XITLALLI	01/08/2024	AIDE I	DOBIE PRE KINDERGARTEN SCH
YOUNG, SEAN	12/12/2023	SPECIAL EDUCATION AIDE	RICHLAND ELEMENTARY

CLASSIFIED	DATE	POSITION	LOCATION
ALSARDIA, ABEER	01/09/2024	CHILD NUTRITIONIST	RICHARDSON TERRACE ELEM
ARTEAGA SERRATO, GUADALUPE	01/22/2024	CUSTODIAL I	FOREST MEADOW JUNIOR HIGH
CAMEJO ACOSTA, MARICELI	01/22/2024	CUSTODIAL I	FOREST LANE ACADEMY

APPOINTMENTS of Paraprofessional and Classified Personnel Continued

CLASSIFIED	**DATE**	**POSITION**	**LOCATION**
DAVIDSON, DEVON	01/11/2024	CUSTODIAL I	CUSTODIAL SERVICES
DENBI, SELAMAWIT	01/09/2024	CHILD NUTRITIONIST	THURGOOD MARSHALL ELEM
HO, CHAU	01/24/2024	CUSTODIAL I	R WEST TECH MAGNET
JEMAL, ZEBIBA	01/24/2024	BUS DRIVER	TRANSPORTATION
KAMARA, HAJA	01/17/2024	CUSTODIAL I	PRESTONWOOD ELEMENTARY
KELLY, AZARIA	01/16/2024	BUS DRIVER	TRANSPORTATION
LE, QUOC	12/19/2023	CUSTODIAL I	BOWIE ELEMENTARY
NUNEZ DIAZ, PAULA	01/17/2024	CUSTODIAL I	BERKNER HIGH SCHOOL
NUNEZ FAJARDO, MAYTE	01/22/2024	CUSTODIAL I	LAKE HIGHLANDS HIGH SCHOOL
PHUNG, NGOC	01/08/2024	CUSTODIAL I	BOWIE ELEMENTARY
PONCIANO LARA, ROGELIO	01/08/2024	MAINTENANCE I	FACILITIES MAINTENANCE
THULLA, HUMU	01/22/2024	BUS MONITOR	TRANSPORTATION
TONG, NU KIEU	01/22/2024	CUSTODIAL I	WALLACE ELEMENTARY
VEITIA MORENO, LAZARA	01/22/2024	CUSTODIAL I	FOREST LANE ACADEMY
VO, TRONG	01/22/2024	CUSTODIAL I	NORTHLAKE ELEMENTARY
WAHABREBI, ZEBIBA	01/10/2024	CHILD NUTRITIONIST	RISD ACADEMY
WELDESLASE, TRHAS	01/19/2024	CHILD NUTRITIONIST	BERKNER HIGH SCHOOL

PART B: Personnel Actions Submitted for Board of Trustees' Information					
SEPARATIONS OF PERSONNEL:					
PROFESSIONAL/ CLASSIFIED/PARA-PROFESSIONAL	**NAME**	**ASSIGNMENT/ SUBJECT/GRADE**	**LOCATION**	**LOCAL YEARS EXPERIENCE**	**DATE EFFECTIVE**
PROFESSIONAL ELEMENTARY	BENITEZ, MAYBELIN	ASSOCIATE TEACHER FT	AUDELIA CREEK ELEMENTARY	0	12/21/2023
PROFESSIONAL ELEMENTARY	BLACK, AUGUSTA	COUNSELOR	LAKE HIGHLANDS ELEMENTARY	7	12/21/2023
PARAPROFESIONAL	CALAMS, JAMES	SPECIAL EDUCATION AIDE	SPECIAL STUDENT SERVICES	6	12/21/2023
CLASSIFIED	CAMPOSECO, JESUS	CUSTODIAL I	WHITE ROCK ELEMENTARY	2	01/17/2024
CLASSIFIED	COUCH, CHELSEA	BUS MONITOR	TRANSPORTATION	0	01/25/2024
PROFESSIONAL ELEMENTARY	DE HUSSON, NICOLE	CAMPUS READING SPEC	HAMILTON PARK PACESETTER	0	01/18/2024
CLASSIFIED	DENNIS, CHELEN	CHILD NUTRITION MGR I	MOHAWK ELEMENTARY	6	12/21/2023
CLASSIFIED	DO, THI	CUSTODIAL I	NORTHLAKE ELEMENTARY	0	01/05/2024
PROFESSIONAL SECONDARY	DOZIER, PRESTON	TEACHER	JJ PEARCE HIGH SCHOOL	4	12/21/2023
CLASSIFIED	EDWARDS, KATHERINE	CHILD NUTRITION SUP	CHILD NUTRITION	29	12/21/2023
PROFESSIONAL ADMINISTRATION	FRITSCHIE, RENEE	TEACHER	SPECIAL STUDENT SERVICES	2	01/23/2024
PARAPROFESIONAL	GILLIGAN LOEFFLER, SHEILA	SPECIAL ED AIDE	MOSS HAVEN ELEMENTARY	11	12/21/2023
PROFESSIONAL ADMINISTRATION	HAQ, BUSHRA	REF SVCS PROG ADMIN	STUDENT SERVICES	8	12/21/2023
CLASSIFIED	HERRERA, MARTIN	CUSTODIAL I	CUSTODIAL SERVICES	0	01/10/2024
PARAPROFESIONAL	HIGGINS, SHELBY	AIDE I	HAMILTON PARK PACESETTER	1	12/21/2023
CLASSIFIED	HILL, MAI	BUS MONITOR	TRANSPORTATION	2	01/12/2024
PARAPROFESIONAL	HUNTER, NATALIE	EXECUTIVE ASSISTANT I	SPRING CREEK ELEMENTARY	4	01/12/2024
PARAPROFESIONAL	JOHNSON, ESTATE OF CLARA	SITE COORDINATOR I	RISD ACADEMY	11	12/15/2023
PARAPROFESIONAL	JOHNSON, ESTATE OF DAVID	CLERK10MO	RICHLAND ELEMENTARY	0	12/14/2023
PROFESSIONAL ELEMENTARY	JUNG, SHANNON	CAMPUS MATH SPEC	FORESTRIDGE ELEMENTARY	2	12/21/2023
PARAPROFESIONAL	LOPEZ, ANGELIYA	LIBRARY ASSISTANT	LAKE HIGHLANDS HIGH SCHOOL	0	12/21/2023
CLASSIFIED	LUCAS, KATHRYN	CHILD NUTRITION ASST MGR	CHILD NUTRITION	0	01/09/2024
CLASSIFIED	NGUYEN, DUC CHI	CUSTODIAL I	WALLACE ELEMENTARY	0	12/22/2023
PARAPROFESIONAL	OSHODI, AKINOLA	SPECIAL EDUCATION AIDE	C MCAULIFFE LEARNING CTR	1	12/21/2023
PROFESSIONAL SECONDARY	PASCHEL, BRETT	ASSOCIATE TEACHER FT	R WEST TECH MAGNET	0	01/17/2024
CLASSIFIED	PHOMPHAKDY, THONGDY	PARKING LOT ATTENDANT	RICHARDSON HIGH SCHOOL	7	12/21/2023
CLASSIFIED	RIVAS, SOFIA	CHILD NUTRITIONIST	RICHARDSON HIGH SCHOOL	0	01/12/2024
PROFESSIONAL SECONDARY	ROBERTS, PAIGE	TEACHER	LAKE HIGHLANDS HIGH SCHOOL	1	01/08/2024

SEPARATIONS OF PERSONNEL:

PROFESSIONAL/ CLASSIFIED/PARA-PROFESSIONAL	NAME	ASSIGNMENT/ SUBJECT/GRADE	LOCATION	LOCAL YEARS EXPERIENCE	DATE EFFECTIVE
PROFESSIONAL SECONDARY	RUSTOM, MELAT	TEACHER	WESTWOOD: M/S/L MAGNET	5	12/21/2023
CLASSIFIED	SAEKHOW, MANOP	MAINTENANCE II	FACILITIES MAINTENANCE	39	12/29/2023
CLASSIFIED	SANCHEZ , HERLINDA	CHILD NUTRITIONIST	CHILD NUTRITION	0	12/21/2023
PROFESSIONAL ELEMENTARY	SHIELS, CAMERON	TEACHER	AIKIN ELEMENTARY	0	01/08/2024
PARAPROFESIONAL	SILGUERO LOZANO, MARIA	AIDE I	CAROLYN G BUKHAIR ELEM	2	12/15/2023
PROFESSIONAL ADMINISTRATION	SIMONDS, MONICA	DIRECTOR	ADVANCED ACADEMICS	24	01/08/2024
PARAPROFESIONAL	SORENSON, OLIVIA	AIDE I	SPRING CREEK ELEMENTARY	0	12/21/2023
PARAPROFESIONAL	STEPHENS, HOLLY	AIDE I	BIG SPRINGS ELEMENTARY	2	12/21/2023
PROFESSIONAL SECONDARY	WALLACE, DESTINY	TEACHER	C MCAULIFFE LEARNING CTR	0	01/19/2024
PROFESSIONAL SECONDARY	WICK, KATHERINE	TEACHER	APOLLO JUNIOR HIGH	3	01/24/2024
PARAPROFESIONAL	WILLIAMS, SADE	SPECIAL ED AIDE	MATH/SCIENCE/TECH MAGNET	0	12/21/2023
PROFESSIONAL ADMINISTRATION	WOOD, COURTNEY	HIGH NEED INTERVENTION	PRE K 12 INTERVENTION	10	01/26/2024

BOARD OF TRUSTEES

Richardson Independent School District
Richardson, Texas

Date: **February 22, 2024**

Submitted by: David Pate, Assistant Superintendent of Finance & Support Services

INFORMATION AND ACTION ITEM

TOPIC: **Specified Best Value/Low Bids, Contracts, and Cumulative Purchases**

BACKGROUND INFORMATION:

Bids for the items listed in Part A on the attached sheets were advertised and received for opening in the RISD Purchasing Department. The bid(s) listed under Part A are recommended for acceptance as the lowest responsive bid(s) or other qualifying bid that meets specifications and provides the best value to the District. If the lowest responsive bid does not fall within the budgeted amount for the item, supportive justification and information has been requested and may be made available.

Bids listed in Part B reflect vendors recommended for renewal of an existing bid that was originally approved as providing the best value/lowest responsive bid for the district.

Part C sets out purchases, contracts, contract modifications, and any contract change orders recommended for approval. The amount of items listed in Part C exceeds $100,000. Purchases and contract(s) for the goods and services reflected under Part C have been reviewed and negotiated, where appropriate. Each contract is within the budgeted amount for the item, category, or service. As indicated, certain purchases and contracts have been renegotiated, modified, or otherwise changed. Any such changes recommended are within budgeted amounts.

Part D reflects Interlocal Agreements, Memorandums of Understanding, and Cooperative Agreements that address agreements and understandings between other local governmental entities or certain nonprofit organizations. These items are recommended for the Board's approval.

Part E is provided for the Board's information. The items reflected in this section involve contract amounts of less than $100,000. Board policy CH (Local) delegates purchasing authority to the Superintendent for expenditure of budgeted amounts for goods and services under $100,000.

Part F is provided for the Board's information. This section provides information about cumulative purchases from state-approved vendors under contracts or buying cooperative agreements that the Board already has approved. All such purchases have been made through established District procedures to ensure that the purchase provided the best buy at the lowest available price.

SUPERINTENDENT'S RECOMMENDATION:

The Superintendent recommends that the Board approve the items recommended under Parts A, B, C, and D. The items in Parts E and F are provided for the Board's information.

PROPOSED RESOLUTION

Whereas, in compliance with state purchasing and procurement requirements and other applicable law, the RISD Purchasing Department, in collaboration with the end-user departments, has solicited, received, opened, and considered responsive bids for contracts to procure various goods and services required for District operations and has made recommendations for the acceptance and approval of bids and contracts that provide the best value to the District; and

WHEREAS, the district has collaborated with other local government entities to develop Interlocal Agreements and Memoranda of Understanding to obtain goods or share services; and

WHEREAS, the District has made cumulative purchases from previously qualified vendors in accordance with applicable procedures for services and has entered into contracts for goods and services within the Superintendent's delegated purchasing authority; and

WHEREAS, effective management of the District's purchasing and acquisition processes supports the Board's strategic objectives and strategies; now

THEREFORE, BE IT RESOLVED, that the Board of Trustees of the Richardson Independent School District accepts, and/or approves the recommended bids, contracts, and Interlocal Agreements and Memoranda of Understanding set out in Parts A, B, C, and D on the attached pages.

Board Agenda February 22, 2024

PART A - New Bids -- For Approval

Bid Number	Description	Recommended Vendor	Amount	Budgeted Amount	Number of Responses	Number Of No Bid Responses	Bids Sought
23-260	Miscellaneous Consultant Services	Evelinda Odem - Cheer choreography Andrew Smit - Music consulting STEM Detective. LLC - Professional development			3		
23-277	Cheerleading and Drill Team Supplies & Related Items	BSN Sports Cheerleading Company DANZGEAR Dancewear City Dollamur Sport Surfaces Floyette Originals Inc. Champion Teamwear Music in Motion Riddell All American Sports Sew Much Fun TeamLeader Texas Motion Sports The Costume Closet Varsity Spirit Fashion & Supplies LLC Weissman	Compliance		17	0	138
24-283	Master Scheduling System	Timely Schools	$162,000.00		4		4
23-270	Online Subscriptions including Curriculum Delivery and other Online Delivery Services	Accelerate Learning Attainment Company BrainPop Burlington English Coughlan Companies / Capstone Cengage Learning Connections Education / Pearson Virtual Schools USA DreamBox Learning EBSCO Industries Edpuzzle Eduphoria Incorporated Explore Learning First Online University	Compliance		85		237

		Florida Virtual Schools Frontline Education Houghton Mifflin Harcourt Publishing Company Imagine Learning Lexis Voyager Sopris Monday.com Newsela HMH- NWEA Renaissance Learning Savvas Learning Company Seesaw Learning Sirius Education Solutions World Book Zearn Wakelet	
24-280	Commodity Discount Providers	A-1 Grass Company	Compliance

PART B - Bid Renewals -- For Approval

Bid Number	Description	Recommended Vendor	Amount	Budgeted Amount	Number of Responses	Number Of No Bid Responses	Bids Sought
23-235	Annual Audit Services	Weaver and Tidwell LLP					

PART C - Purchase and Contract Information (Greater than $100,000) -- For Approval

Purchases, Contracts, Contract Modifications & Change Orders: Greater than $100,000		Amount
Netsync Network Solutions - Student devices for the 2024-2025 school year (RISD # 21-124)	$	3,760,830.00
Delcom Group - Interactive Flat Panel Displays and Installation (RISD # 24-282/TIPS 230901)	$	516,719.05
Interface Americas - Flooring Replacement - Summer 2024, Materials ONLY - RISD Academy (Sourcewell 061323-IFA)	$	277,462.67

Delcom Group - LHMS Gym Audio Visual with ScoreVision (TIPS 230105)	$	242,964.29
Stantec - Multi-Campus Flooring Replacement - Summer 2024 (RISD 23-276)	$	211,287.00
Interface Americas - Flooring Replacement - Summer 2024, Materials ONLY - Richland Elementary (Sourcewell 061323-IFA)	$	179,304.86
Interface Americas - Flooring Replacement - Summer 2024, Materials ONLY - Forestridge Elementary (Sourcewell 061323-IFA)	$	172,934.73
Enviromatic Systems - LHE EMA Controls Upgrades (RISD 22-186)	$	167,745.00
Amanda Coffey (Behavior Network) - to provide special education services through June 30, 2024 for student 2.	$	135,937.00
Interface Americas - Flooring Replacement - Summer 2024, Materials ONLY - Northwood Hills Elementary (Sourcewell 061323-IFA)	$	131,166.90
Netsync Network Solutions - Lake Highlands Middle School Purchase and the installation of Network Uninterrupted Power Supply's (DIR-CPO-4430)	$	129,260.64
Interface Americas - Flooring Replacement - Summer 2024, Materials ONLY - Richardson Heights Elementary (Sourcewell 061323-IFA)	$	125,448.25
Amanda Coffey (Behavior Network) - to provide special education services through June 30, 2024 for student 1.	$	125,437.00
Interface Americas - Flooring Replacement - Summer 2024, Materials ONLY - Jess Harben Elementary (Sourcewell 061323-IFA)	$	124,362.43
Interface Americas - Flooring Replacement - Summer 2024, Materials ONLY - Spring Creek Elementary (Sourcewell 061323-IFA)	$	124,072.89
Interface Americas - Flooring Replacement - Summer 2024, Materials ONLY - O. Henry Elementary (Sourcewell 061323-IFA)	$	123,421.39

PART D - Interlocals, MOU's, Cooperative Agreements, and Other -- For Approval

Interlocals

Region 10 ESC Multi-Region Purchasing Cooperative SY 24-25

City of Richardson - Temporary Construction Easement

The University of Mississippi - Clinical Education and Training Affiliation Agreement - Term (1) year with (4) additional one-year terms

Memorandum of Understanding

The Impact Counselors - Counseling services for RISD students.	$	20,000.00

Not to Exceed

Cooperative Agreements

CDW Government LLC per TIPS #230105 thru 5/31/2028 for Technology Solutions Products and Services	$	1,000,000.00
CDW Government LLC per DIR-CPO-5093 thru 11/21/2024 for Product, Services, and Related Services	$	50,000.00
Delcom Group Technology Solutions per TIPS #230105 thru 5/31/2028 for Technology Solutions Products and Services	$	200,000.00
Delcom Group Technology Solutions per TIPS #230901 thru 11/30/2026 for Audio Visual Equipment, Supplies and Services	$	2,000,000.00
Interface Americas Inc. per Sourcewell #061323-IFA thru 8/9/2027 for Flooring Materials with Related Supplies and Services	$	2,000,000.00
JourneyEd.com per DIR-CPO-4451 thru 5/8/2024 for Products and Related Services	$	50,000.00
Technology for Education per TIPS #230105 thru 5/31/2028 for Technology Solution Products and Services	$	2,500,000.00

Other

None

PART E - Contracts, Contract Modifications & Change Orders: Less than $100,000 (Information Only)

Amount

Jessica Dieke - Licensed specialist in School Psychology to provide support to Ricahrdson ISD's staff including but not limited to, educational assessment, report writing, and attendance odf ARD meetings through March 18, 2024.	$	19,800.00

PART F - Cumulative Purchases -- Information Only

Cumulative Purchases from Qualified Vendors:		**Amount**
BUY BOARD - Texas Association of School Boards	$	110,607.75
CCGPF - Collin County Governmental Purchasing Forum	$	4,290.29
CPGPC - Choice Partners	$	160,846.65
DIR - State of Texas Department of Information Resources	$	205,810.17
EPCNT - Education Purchasing Cooperative of North Texas	$	170,698.08
ESC - Educational Service Center	$	77,128.00
SOURCEWELL - Sourcewell (previously NJPA)	$	50,774.90
MULTI-REGION Purchasing Cooperative	$	5,000.00
OMNIA Partners - TCPN/IPA/US Communities	$	58,716.00

PPPCP - Prospering Pals		$	10,580.98
TIPS - The Interlocal Purchasing System		$	812,431.33
TPASS - Texas Procurement and Support Services		$	600.00
EQUALIS		$	9,596.33
	TOTAL:	**$**	**1,677,080.48**

BOARD AGENDA - February 22, 2024
RECOMMENDED SPECIFIED BID COMMENTS

Bid #	Description	Comments
22-184	Miscellaneous Consultant Services	This RFP (unsealed) establishes a roster of vendors to be used for consulting contracts. Vendors will be added as responses are submitted to the district and approved for district use. Contracts will be reported as needed per the BOT reporting guidelines. The term for this roster of vendors ends 8/31/2028.
23-277	Cheerleading and Drill Team Supplies & Related Items	This RFSP (Request for Sealed Proposal) establishes multiple vendors for the legal procurement of Cheerleading and Drill Team Related items to be used by the District on an as-needed basis. Term of this award ends February 18, 2027.
24-283	Master Scheduling System	This CSP (Competitive Sealed Proposal) establishes a vendor to provide a master scheduling system for HS and Jr Highs. This is a three year agreement ending June 30, 2027 with (1) two-year renewal option.
23-270	Online Subscriptions including Curriculum Delivery and other Online Delivery Services	This RFSP (Request for Sealed Proposal) establishes a roster of vendors who provide Online Subscription services. Term of this award ends June 30, 2028. Several vendors were awarded at the January 18th meeting. Due to legal reviews these additional vendors are recommended.
24-280	Commodity Discount Providers	This RFP (unsealed) establishes a roster of vendors to be used for various district commodities. Vendors will be added as responses are submitted to the district and approved for district use. The term end date for these vendors will be assigned per commodity.

Bid Renewals:

Bid #	Description	Comments
23-235	Annual Audit Services	RISD awarded this bid on April 13, 2023 for one (1) year. The vendor and RISD agree to renew this agreement for one (1) year. The is the first of (4) four renewal options. This award includes the faciliation of the FY24 financial audit.

BOARD OF TRUSTEES

Richardson Independent School District
Richardson, Texas

Date: **February 22, 2024**

Submitted by: David Pate, Assistant Superintendent of Finance & Support Services

INFORMATION ITEM

TOPIC: **Upcoming Bids**

BACKGROUND INFORMATION

Attached is a schedule of anticipated bids for the next 12 months.

SUPERINTENDENT'S RECOMMENDATION

The Superintendent presents this schedule for the Board's information.

RISD Purchasing Department- Upcoming Bids

BOT Meeting

March
Career and Technology Programs - Supplies, Service, Software, and Related Items
Onsite Student Portraits including ID Badges and Class Pictures

April
Workers' Compensation Third Party Claims Administration Services
Districtwide Telephony Refresh
Multi-Campus Flooring Replacement Project – Summer 2024
CN Disposable Supplies

May
Document Storage Services
Custodial Supplies

June
CN Plastic 6-Compartment Trays

August

September

October

November
Print/Copy Services

December

January

February

BOARD OF TRUSTEES
Richardson Independent School District
Richardson, Texas

Date: February 22, 2024

Submitted by: David Pate, Assistant Superintendent of Finance and Support Services

INFORMATION ITEM

TOPIC: Bond Expenditure Reports

BACKGROUND INFORMATION

The Bond Program Management Department prepares a report of the 2016 bond authorization expenditures each month. These reports are presented as part of a process to ensure community understanding and provide a degree of oversight of financial decisions regarding these monies.

SUPERINTENDENT'S RECOMMENDATION

The Superintendent presents these reports for the Board's information.

RICHARDSON INDEPENDENT SCHOOL DISTRICT
Bond Expenditures By Project Through January 29, 2023
Bond Series 2016

	Original Budget	Amended Budget	Spent and Committed	% Spent To Date	Balance	Estimate To Complete	Available or (Shortage)	Amounts Issued 2016 Bond	Changes from Prior Report 15-Dec-23: Spent and Committed	Changes from Prior Report 15-Dec-23: Estimate to Complete	Changes from Prior Report 15-Dec-23: Available or (Shortage)
Instruction & Technology											
Athletics	9,205,140	8,656,850	8,217,487	94.9%	439,363	439,363	-	9,205,140	-	-	-
Career & Technical Education	16,332,244	16,340,778	16,315,844	99.8%	24,933	24,933	-	16,332,244	-	-	-
Fine Arts	7,405,580	6,869,930	6,867,405	100.0%	2,525	2,525	-	7,405,580	-	-	-
Health Services	266,780	358,445	358,445	100.0%	-	-	-	266,780	-	-	-
Innovative Instructional Space/Library Media	19,188,412	16,534,298	16,238,121	98.2%	296,177	296,177	-	19,188,412	-	-	-
Instructional Technology	59,216,049	59,535,629	59,020,044	99.1%	515,584	515,584	-	59,216,049	-	-	-
Junior Reserve Officer Training Corp (JROTC)	623,500	660,610	565,923	85.7%	94,687	94,687	-	623,500	-	-	-
Language Arts	1,914,445	1,916,255	1,878,280	98.0%	37,974	37,974	-	1,914,445	-	-	-
Languages Other Than English	1,185,800	1,196,600	1,188,737	99.3%	7,863	7,863	-	1,185,800	-	-	-
Mathematics	1,151,550	1,151,550	1,151,369	100.0%	181	181	-	1,151,550	-	-	-
Multipurpose Activity Centers	59,981,665	49,892,912	49,892,912	100.0%	-	-	-	59,981,665	-	-	-
PACE After School Program	216,000	223,204	216,000	96.8%	7,204	7,204	-	216,000	-	-	-
Physical Education & Health	489,400	462,878	448,362	96.9%	14,516	14,516	-	489,400	-	-	-
Science	2,656,702	2,689,598	2,689,598	100.0%	-	-	-	2,656,702	-	-	-
Social Studies	311,523	340,900	311,708	91.4%	29,192	29,192	-	311,523	-	-	-
Special Education	1,438,000	5,439,878	4,929,611	90.6%	510,266	510,266	-	1,438,000	-	-	-
Student Assistance Programs	55,875	55,875	55,262	98.9%	613	613	-	55,875	-	-	-
Student Performance and Evaluation	410,000	437,026	369,015	84.4%	68,011	68,011	-	410,000	-	-	-
Visual Arts	547,697	469,294	465,795	99.3%	3,499	3,499	-	547,697	-	-	-
	182,596,362	173,232,507	171,179,918	98.8%	2,052,588	2,052,588	-	182,596,362	-	-	-
Infrastructure and Support											
Enterprise Technology	35,565,000	31,437,902	27,209,033	86.5%	4,228,868	4,228,868	-	35,565,000	(399,628)	399,628	-
Facilities	97,507,693	88,200,917	84,620,644	95.9%	3,580,273	3,580,273	-	97,507,693	752	(752)	-
Furniture, Office Equipment, Copiers	7,534,426	9,354,001	9,203,786	98.4%	150,215	150,215	-	7,534,426	-	-	-
Maintenance & Operations	3,294,834	3,294,269	3,294,269	100.0%	-	-	-	3,294,834	-	-	-
Program and Project Management	1,282,044	1,329,012	1,238,541	93.2%	90,471	90,471	-	1,282,044	451	(451)	-
Transportation	3,349,835	1,176,497	1,092,929	92.9%	83,568	83,568	-	3,349,835	-	-	-
	148,533,832	134,792,597	126,659,202	94%	8,133,396	8,133,396	-	148,533,832	(398,425)	398,425	
Construction											
Construction	107,271,359	132,034,300	132,034,300	100.0%	-	-		107,271,359	-	-	
	107,271,359	132,034,300	132,034,300	100.0%	-	-	-	107,271,359	-	-	-
TOTAL 2016 BOND	438,401,553	440,059,404	429,873,420	97.7%	10,185,984	10,185,984	-	438,401,553	(398,425)	398,425	-

(1) "Estimate To Complete" includes 100% of the original project estimate for projects not yet bid and estimated cost of projects in progress.
(2) From the total bond amount, $84M was issued on 7/21/16, $225M was issued on 5/31/17, and $128M was issued on 6/13/19

BOARD OF TRUSTEES
Richardson Independent School District
Richardson, Texas

Date: February 22, 2024

Submitted by: David Pate, Assistant Superintendent of Finance and Support Services

INFORMATION ITEM

TOPIC: Bond Expenditure Reports

BACKGROUND INFORMATION

The Bond Program Management Department prepares a report of the 2021 bond authorization expenditures each month. These reports are presented as part of a process to ensure community understanding and provide a degree of oversight of financial decisions regarding these monies.

SUPERINTENDENT'S RECOMMENDATION

The Superintendent presents these reports for the Board's information.

RICHARDSON INDEPENDENT SCHOOL DISTRICT
Bond Expenditures By Project Through January 29, 2024
Bond Series 2021

									Changes from Prior Report 15-Dec-23		
	Original Budget	Amended Budget	Spent and Committed	% Spent To Date	Balance	Estimate To Complete	Available or (Shortage)	Amounts Issued 2021 Bond	Spent and Committed	Estimate to Complete	Available or (Shortage)
Instruction & Technology											
Accountability Continuous Imp	2,580,000	2,580,000	1,661,581	64.4%	918,419	918,419	-	2,580,000	-	-	-
Advance Learning Services	3,527,000	3,167,000	905,202	28.6%	2,261,798	2,261,798	-	3,527,000	-	-	-
Athletics	10,400,440	14,525,385	9,045,185	62.3%	5,480,200	5,480,200	-	10,400,440	112,139	(112,139)	-
Bilingual	1,100,000	1,100,000	567,528	51.6%	532,472	532,472	-	1,100,000	-	-	-
Career & Technical Education	13,700,000	12,300,000	5,853,643	47.6%	6,446,357	6,446,357	-	13,700,000	114,435	(114,435)	-
English as Second Language	3,083,130	3,083,130	1,762,034	57.2%	1,321,096	1,321,096	-	3,083,130	5,085	(5,085)	-
Fine Arts Music and Theatre	7,250,000	7,925,000	5,882,417	74.2%	2,042,583	2,042,583	-	7,250,000	49,099	(49,099)	-
Health Services	248,000	248,000	158,812	64.0%	89,188	89,188	-	248,000	-	-	-
Innovative Instructional Space/Library Media	2,943,000	2,943,000	1,497,904	50.9%	1,445,096	1,445,096	-	2,943,000	83,818	(83,818)	-
Instructional Technology	70,521,762	71,756,214	43,544,433	60.7%	28,211,781	28,211,781	-	70,521,762	4,033,195	(4,033,195)	-
JROTC	336,582	336,582	131,154	39.0%	205,428	205,428	-	336,582	-	-	-
Language Arts	5,965,050	5,965,050	952,328	16.0%	5,012,722	5,012,722	-	5,965,050	-	(288,311)	-
Language Other Than English	431,000	431,000	393,264	91.2%	37,736	37,736	-	431,000	-	-	-
Literacy & Intervention	6,071,311	6,121,311	3,482,533	56.9%	2,638,778	2,638,778	-	6,071,311	142,332	(1,058,594)	-
Mathematics	3,553,500	3,728,000	3,398,253	91.2%	329,747	329,747	-	3,553,500	-	-	-
Physical Education & Health	325,000	325,000	277,075	85.3%	47,925	47,925	-	325,000	16,799	(16,799)	-
PreKindergarten	967,232	967,232	554,142	57.3%	413,090	413,090	-	967,232	423	(423)	-
Prevention Programming	100,000	97,400	22,182	22.8%	75,218	75,218	-	100,000	-	-	-
Print Services	1,710,000	1,710,000	1,550,982	90.7%	159,018	159,018	-	1,710,000	445	(445)	-
Science	1,940,000	1,940,000	721,672	37.2%	1,218,328	1,218,328	-	1,940,000	134	(134)	-
Social Studies	343,000	343,000	261,400	76.2%	81,600	81,600	-	343,000	-	-	-
Special Student Services	1,828,068	1,828,068	942,425	51.6%	885,643	885,643	-	1,828,068	4,401	(4,401)	-
Teaching and Learning Svcs	1,672,000	1,672,000	970,740	58.1%	701,260	701,260	-	1,672,000	-	-	-
Visual Arts	628,024	628,024	624,463	99.4%	3,561	3,561	-	628,024	23,662	(23,662)	-
	141,224,099	145,720,396	85,161,353	58.4%	60,559,042	60,559,042	-	141,224,099	4,585,967	(5,790,540)	-
Infrastructure and Support											
Enterprise Technology	34,120,000	36,607,754	30,929,063	84.5%	5,678,691	5,678,691	-	34,120,000	108,262	(108,262)	-
Facilities	115,134,118	90,663,758	70,206,256	77.4%	20,457,502	20,457,502	-	115,134,118	(1,140,434)	1,172,934	-
Furniture, Office Equipment, Copiers	13,534,803	18,498,871	13,891,050	75.1%	4,607,821	4,607,821	-	13,534,803	1,966,155	(1,966,155)	-
Maintenance & Operations	2,681,811	2,681,811	1,734,337	64.7%	947,474	947,474	-	2,681,811	(1,246)	1,246	-
Program and Project Management	1,138,200	1,138,200	585,467	51.4%	552,733	552,733	-	1,138,200	19,666	(19,666)	-
Safety and Security	7,471,466	7,116,496	673,392	9.5%	6,443,104	6,443,104	-	7,471,466	4,025	(4,025)	-
Transportation	9,344,876	10,628,205	9,961,571	93.7%	666,634	666,634	-	9,344,876	7,115	(7,115)	-
	183,425,274	167,335,095	127,981,135	76.5%	39,353,960	39,353,960	-	183,425,274	963,542	(931,042)	
Construction											
Construction	283,534,254	354,170,330	341,200,572	96.3%	12,969,758	12,969,758	-	283,534,254	555,247	(555,247)	-
	283,534,254	354,170,330	341,200,572	96.3%	12,969,758	12,969,758	-	283,534,254	555,247	(555,247)	-
TOTAL 2021 BOND	608,183,627	667,225,821	554,343,061	83.1%	112,882,760	112,882,760	-	608,183,627	6,104,757	(7,276,830)	-

(1) "Estimate To Complete" includes 100% of the original project estimate for projects not yet bid and estimated cost of projects in progress.
(2) From the total bond amount, $200M was issued on 07/19/21, $200M was issued on 6/08/22

BOARD OF TRUSTEES
Richardson Independent School District
Richardson, Texas

Date: February 22, 2024

Submitted by: David Pate, Assistant Superintendent of Finance and Support Services

INFORMATION ITEM

TOPIC: **Monthly Financial Statements**

BACKGROUND INFORMATION

The financial statements for the General Fund, Child Nutrition Fund and Debt Service Fund are presented for review.

SUPERINTENDENT'S RECOMMENDATION

The Superintendent presents these financial statements for the Board's Information

RICHARDSON INDEPENDENT SCHOOL DISTRICT

EVERY CHILD. EVERY TEACHER. EVERY LEADER. EVERY DAY.

Finance and Support Services

Date: February 22, 2024

To: Tabitha Branum
Superintendent

From: David Pate, CPA
Assistant Superintendent of Finance and Support Services

Subject: Summary of October 2023 Monthly Financial Statements

YEAR TO DATE PAYROLL COST EXCLUDING TRS – FUND 199, GENERAL FUND

As of October 31, 2023, the year-to-date budget exceeded actual payroll costs for the General Fund by $3,342,630 (3%). Actual payroll costs for the General Fund (excluding TRS On-behalf payments) totaled $72,001,208, an increase of $1,090,951 (1.5%) when compared to $70,910,257 at October 31, 2022.

SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE

General Fund (199)

Revenues are consistent with budget expectations and/or prior year activity, except for the following sources:

- Refunds issued for prior year tax supplements increased created a decrease in Tax Prior Years (Object 5712) due to supplemental changes in the tax roll.
- Earnings from Temporary Deposits and Investments (Object 5742) increased by $2,325,476 (247%) due to increased interest rates, when compared to the previous year.
- Rent (Object 5743) decreased by $335,548 (-30%) due to tenants moving out of the Sherman Street properties as their leases ended.
- Gifts (Object 5744) decreased by $152,756 (-394%) due to the reclass of a donation recorded in the general fund to the campus activity fund.

- Insurance Recovery (Object 5745) increased by $182,304 due to the receipt of insurance proceeds related to the winter storm damage that occurred in December 2022.
- Miscellaneous Revenue from Intermediate Sources increased by $319,679 due to the receipt of a payment related to the dissolution of Dallas County Schools.

As of October 31, 2023 33% of the year has passed. Expenditures are consistent with budget expectations and/or prior year activity.

Child Nutrition Fund (240)

Revenues are consistent with budget expectations and/or prior year activity, except for the following sources:

- Federal Revenues Distributed by State of Texas Government Agencies (Object 5939) decreased by $1,175,364 due to the timing of payments from the Texas Department of Agriculture.

As of October 31, 2023 33% of the year has passed. Expenditures are consistent with budget expectations and/or prior year activity, except for the following functions:

- Function 35 (Food Service) increased by $422,070, primarily due to the timing of the receipt of invoices for the purchase of food at the start of school and cost of food.

Debt Service Fund (599)

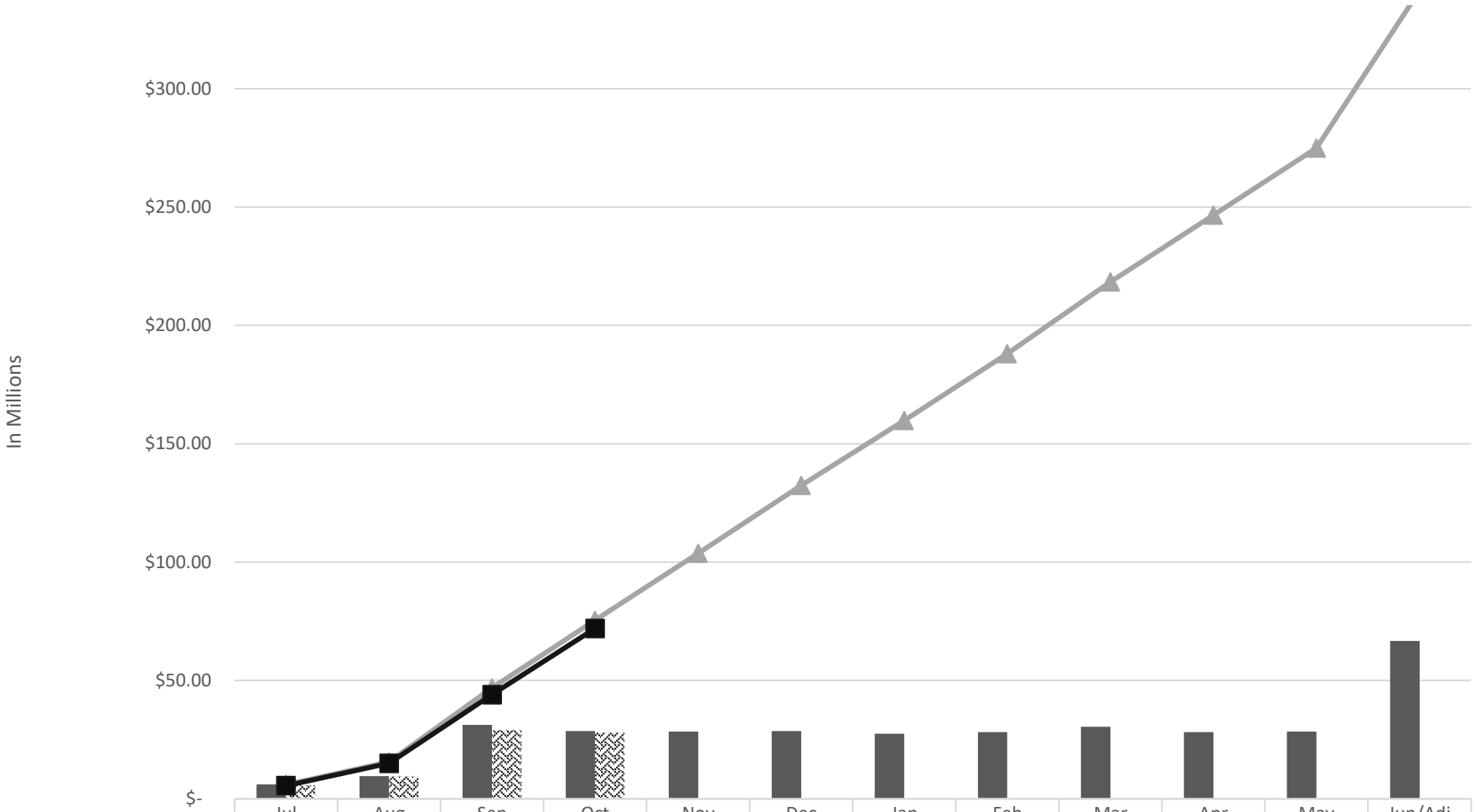
Revenues are consistent with budget expectations and/or prior year activity, except for the following sources:

- Earnings from Temporary Deposits and Investments (Object 5742) increased by $252,283 (183%) due to increased interest rates, when compared to the previous year.

As of October 31, 2023 33% of the year has passed. Expenditures are consistent with budget expectations and/or prior year activity, except for the following functions:

- Increase in Function 72 (Interest on Long-term Debt) of $7,624,506 is due to interest payments associated with the issuance of bond series 2022A issued in November 2022. The District makes scheduled principal and interest payments in February and interest only payments in August.

FY 2024 General Fund Payroll Analysis
Excluding TRS On-Behalf and ESSER Supplanting



	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun/Adj
Budget By Month	$5.99	$9.60	$31.20	$28.56	$28.37	$28.62	$27.48	$28.17	$30.38	$28.19	$28.38	$66.72
Actual By Month	$5.56	$9.44	$29.03	$27.96								
Cumulative Budget	$5.99	$15.59	$46.79	$75.34	$103.72	$132.34	$159.82	$187.99	$218.37	$246.56	$274.95	$341.66
Cumulative Actual	$5.56	$15.01	$44.04	$72.00								

RICHARDSON INDEPENDENT SCHOOL DISTRICT
SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE
BUDGET TO ACTUAL
GENERAL FUND (199)

% OF YEAR COMPLETE: 33%

DESCRIPTION		**Oct-23 Budget**	**Oct-23 Actual**	**% of Actual to Budget**	**Oct-22 Budget**	**Oct-22 Actual**	**% of Actual to Budget**
	REVENUES						
5711	Taxes Current Year Levy	$ 235,475,064	$ 4,239,237	2%	$ 282,518,535	$ 6,000,693	2%
5712	Taxes Prior Years	978,000	(363,561)	-37%	100,000	119,251	119%
5719	Penalties Interest and Other Tax Revenues	976,574	163,986	17%	400,000	136,000	34%
5739	Tuition and Fees	2,253,000	1,376,080	61%	2,050,000	1,041,875	51%
5742	Earnings from Temporary Deposits and Investments	150,000	3,266,292	2178%	150,000	940,816	627%
5743	Rent	1,850,000	768,673	42%	1,850,000	1,104,221	60%
5744	Revenue from Foundations, Non-Profits, and Gifts	5,000	(113,961)	-2279%	1,848	38,795	2099%
5745	Insurance Recovery	69,573	223,207	321%	-	42,903	100%
5749	Other Revenues from Local Sources	400,000	106,210	27%	101,000	143,373	142%
5752	Athletic Activities	300,000	368,198	123%	300,000	320,826	107%
5769	Miscellaneous Revenues from Intermediate Sources	-	319,679	100%	-	-	0%
5811	Per Capita Apportionment	13,982,774	1,980,334	14%	31,861,184	3,329,584	10%
5812	Foundation School Program Act Entitlements	86,439,594	57,312,052	66%	15,473,780	45,988,949	297%
5831	Teacher Retirement TRS Care On-Behalf Payments	24,000,000	6,925,579	29%	24,000,000	6,778,756	28%
5929	Federal Revenues Distributed by Texas Education Agency	1,500,000	-	0%	4,500,000	5,463	0%
5931	School Health and Related Services (SHARS)	3,500,000	91,434	3%	3,000,000	21	0%
5939	Federal Revenues Distributed by State of Texas Government	80,000	37,580	47%	80,000	129,855	162%
5949	Federal Revenues Distributed Directly from the Federal	18,233	18,233	100%	-	-	0%
	TOTAL REVENUES	$ 371,977,812	$ 76,719,252	21%	$ 366,386,347	$ 66,121,381	18%

RICHARDSON INDEPENDENT SCHOOL DISTRICT
SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE
BUDGET TO ACTUAL
GENERAL FUND (199)

% OF YEAR COMPLETE: 33%

	DESCRIPTION	**Oct-23 Budget**	**Oct-23 Actual**	**% of Actual to Budget**	**Oct-22 Budget**	**Oct-22 Actual**	**% of Actual to Budget**
	EXPENDITURES						
11	Instruction	$ 228,116,542	$ 48,492,613	21%	$ 238,297,131	$ 47,257,391	20%
12	Instructional Resources and Media Services	6,494,463	1,209,606	19%	5,888,042	1,193,571	20%
13	Curriculum Development and Instructional Staff Development	9,343,404	2,288,510	24%	9,072,009	2,446,027	27%
21	Instructional Leadership	7,840,926	2,050,842	26%	6,546,113	1,937,704	30%
23	School Leadership	27,642,147	6,871,911	25%	26,844,241	6,903,783	26%
31	Guidance, Counseling and Evaluation Services	20,178,467	4,099,021	20%	19,187,111	3,963,467	21%
32	Social Work Services	1,504,627	468,337	31%	1,403,815	497,607	35%
33	Health Services	6,375,022	1,539,695	24%	6,008,231	1,485,554	25%
34	Student (Pupil) Transportation	9,428,210	3,169,086	34%	7,697,476	3,696,489	48%
35	Food Service	775,600	114,073	15%	775,600	102,844	13%
36	Cocurricular/Extracurricular Activities	6,755,270	2,195,684	33%	6,571,913	2,158,132	33%
41	General Administration	10,868,248	3,261,003	30%	11,726,628	3,393,027	29%
51	Plant Maintenance and Operations	35,064,986	11,059,287	32%	33,766,394	10,747,179	32%
52	Security and Monitoring Services	2,397,463	1,162,302	48%	2,534,130	1,062,039	42%
53	Data Processing Services	5,433,608	1,399,347	26%	5,300,797	1,311,215	25%
61	Community Services	2,125,018	367,941	17%	2,090,980	320,080	15%
71	Debt Service	79,038	49,426	63%	9,245	-	0%
72	Interest on Long-term Debt	540	99	18%	-	-	0%
81	Facilities, Acquisition and Construction	48,000	-	0%	4,048,000	-	0%
91	Contracted Instructional Services Between Public Schools	5,721,195	-	0%	3,680,761	-	0%
93	Payments to Member Districts of Shared Services Arrangements	255,704	-	0%	255,704	-	0%
95	Payments to Juvenile Justice Alternative Education Programs	50,000	3,000	6%	50,000	2,280	5%
99	Other Intergovernmental Charges	1,316,566	331,009	25%	1,239,453	-	0%
	TOTAL EXPENDITURES	387,815,044	90,132,792	23%	392,993,774	88,478,389	23%
	EXCESS (DEFICIENCY) REVENUES OVER (UNDER) EXPENDITURES	(15,837,232)	(13,413,540)		(26,607,427)	(22,357,008)	
	OTHER FINANCING SOURCES (USES)						
7912	Sale of Real and Personal Property	100,000	116,184	116%	100,000	75,010	75%
8911	Transfers Out	(1,000,000)	(1,000,000)	100%	(1,000,000)	(1,000,000)	100%
	TOTAL OTHER FINANCING SOURCES (USES)	(900,000)	(883,816)	98%	(900,000)	(924,990)	103%
	NET CHANGE IN FUND BALANCE	(16,737,232)	(14,297,356)		(27,507,427)	(23,281,998)	
	FUND BALANCE JULY 1	184,894,749	184,894,749		170,696,165	170,696,165	
	FUND BALANCE OCTOBER 31 (UNAUDITED)	$ 168,157,517	$ 170,597,393		$ 143,188,738	$ 147,414,167	

RICHARDSON INDEPENDENT SCHOOL DISTRICT
SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE
BUDGET TO ACTUAL
FOOD SERVICE FUND (240)

% OF YEAR COMPLETE: 33%

DESCRIPTION		**Oct-23 Budget**	**Oct-23 Actual**	**% of Actual to Budget**	**Oct-22 Budget**	**Oct-22 Actual**	**% of Actual to Budget**
	REVENUES						
5742	Earnings from Temporary Deposits and Investments	$ 250,000	$ 161,981	65%	$ 3,720	$ 61,350	1649%
5749	Revenues from Local Sources	38,000	10,842	29%	-	23,242	100%
5751	Food Service	1,052,500	872,224	83%	5,512,438	913,293	17%
5829	TEA/Non-Foundation Revenue	165,000	-	0%	88,883	-	0%
5921	School Breakfast Program	3,120,000	191,606	6%	3,527,562	463,052	13%
5922	National School Lunch Program	12,348,000	780,805	6%	9,348,600	1,956,169	21%
5923	United States Department of Agriculture Donated Commodities	1,466,487	6,138	0%	-	89,471	100%
5939	Federal Revenues Distributed by State of Texas Government Agencies	80,700	178,045	221%	124,511	250,917	202%
	TOTAL REVENUES	$ 18,520,687	$ 2,201,641	12%	$ 18,605,714	$ 3,757,494	20%

RICHARDSON INDEPENDENT SCHOOL DISTRICT
SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE
BUDGET TO ACTUAL
FOOD SERVICE FUND (240)

% OF YEAR COMPLETE: 33%

	DESCRIPTION	**Oct-23 Budget**	**Oct-23 Actual**	**% of Actual to Budget**	**Oct-22 Budget**	**Oct-22 Actual**	**% of Actual to Budget**
	EXPENDITURES						
35	Food Service	$ 20,639,637	$ 4,580,174	22%	$ 22,582,087	$ 4,158,104	18%
51	Plant Maintenance and Operations	332,644	73,436	22%	318,145	41,787	13%
61	Community Services	1,200	-	0%	2,500	-	0%
	TOTAL EXPENDITURES	20,973,481	4,653,610	22%	22,902,732	4,199,891	18%
	EXCESS (DEFICIENCY) REVENUES OVER (UNDER) EXPENDITURES	(2,452,794)	(2,451,969)		(4,297,018)	(442,397)	
	OTHER FINANCING SOURCES (USES)						
7915	Operating Transfers In	-	-	0%	-	-	0%
	TOTAL OTHER FINANCING SOURCES (USES)	-	-		-	-	
	NET CHANGE IN FUND BALANCE	(2,452,794)	(2,451,969)		(4,297,018)	(442,397)	
	FUND BALANCE JULY 1	9,150,404	9,150,404		7,191,247	7,191,247	
	FUND BALANCE OCTOBER 31 (UNAUDITED)	$ 6,697,610	$ 6,698,435		$ 2,894,229	$ 6,748,849	

RICHARDSON INDEPENDENT SCHOOL DISTRICT
SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE
BUDGET TO ACTUAL
DEBT SERVICE FUND (599)

% OF YEAR COMPLETE: 33%

	DESCRIPTION	**Oct-23 Budget**	**Oct-23 Actual**	**% of Actual to Budget**	**Oct-22 Budget**	**Oct-22 Actual**	**% of Actual to Budget**
	REVENUES						
5711	Taxes on Current Year Levy	$ 108,841,646	$ 1,870,802	2%	$ 101,387,063	$ 2,017,114	2%
5712	Taxes for Prior Years	100,000	(132,162)	-132%	100,000	38,791	39%
5719	Penalties, Interest and Other Tax Revenues	200,000	43,067	22%	200,000	37,051	19%
5742	Earnings from Temporary Deposits and Investments	750,000	390,467	52%	25,000	138,184	553%
5746	Tax Increment Fund	2,875,000	-	0%	-	-	0%
5829	State Program Revenues Distributed by TEA	1,534,271	-	0%	-	27,814	100%
	TOTAL REVENUES	$ 114,300,917	$ 2,172,174	2%	$ 101,712,063	$ 2,258,954	2%

RICHARDSON INDEPENDENT SCHOOL DISTRICT
SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE
BUDGET TO ACTUAL
DEBT SERVICE FUND (599)

% OF YEAR COMPLETE: 33%
DESCRIPTION

	EXPENDITURES	**Oct-23 Budget**	**Oct-23 Actual**	**% of Actual to Budget**	**Oct-22 Budget**	**Oct-22 Actual**	**% of Actual to Budget**
71	Debt Service	74,440,251	-	0%	63,242,657	-	0%
72	Interest on Long-term Debt	42,356,709	21,178,354	50%	36,762,817	13,553,848	37%
73	Bond Issuance Costs and Fees	15,000	2,128	14%	200,000	8,076	4%
97	Payment to Tax Increment Fund	2,875,000	-	0%	1,900,000	-	0%
	TOTAL EXPENDITURES	119,686,960	21,180,482	18%	102,105,474	13,561,924	13%
	EXCESS (DEFICIENCY) REVENUES OVER (UNDER) EXPENDITURES	(5,386,043)	(19,008,308)		(393,411)	(11,302,970)	
	OTHER FINANCING SOURCES (USES)						
7911	Issuance of Bonds	-	-	0%	-	-	0%
7916	Premium or Discount on Issuance of Bonds	-	-	0%	-	-	0%
8949	Other Uses	-	-	0%	-	-	0%
	TOTAL OTHER FINANCING SOURCES (USES)	-	-		-	-	
	NET CHANGE IN FUND BALANCE	(5,386,043)	(19,008,308)		(393,411)	(11,302,970)	
	FUND BALANCE JULY 1	35,088,859	35,088,859		28,415,581	28,415,581	
	FUND BALANCE OCTOBER 31 (UNAUDITED)	$ 29,702,816	$ 16,080,551		$ 28,022,170	$ 17,112,611	

BOARD OF TRUSTEES
Richardson Independent School District
Richardson, Texas

Date: February 22, 2024

Submitted by: David Pate, Assistant Superintendent of Finance & Support Services

ACTION ITEM

TOPIC: **Budget Status Report – 2023-2024 Annual Budget**

BACKGROUND INFORMATION

In compliance with the Texas Education Code and also with TEA Financial Accounting and Reporting Budgeting Module, the expenditure budget for the District must be approved by the Board of Trustees. The annual budget includes Funds 199 (Operating), 240 (Child Nutrition), and 599 (Debt Service) and is adopted by function and object series as prescribed by the Budgeting Module.

Many changes in function expenditures occur within each month. To keep the Board informed of these changes, the Budget Status Report for expenditures is presented for approval on a monthly basis. Changes in function expenditures or appropriations in amounts greater than $5,000 are not made until the Board of Trustees gives its approval.

SUPERINTENDENT'S RECOMMENDATION

The Superintendent recommends that the Board of Trustees of the Richardson Independent School District approve the Budget Status Report as listed on the following pages.

RESOLUTION

WHEREAS, the Board of Trustees adopted the budget for the fiscal year in June; and

WHEREAS, changes occur in expenditures during the year; and

WHEREAS, these changes are necessary for the successful education of the students in the district and

WHEREAS, ensuring timely and accurate financial record keeping supports the Board's Strategic Objectives and Strategies;

THEREFORE, BE IT RESOLVED, that the Board of Trustees of the Richardson Independent School District approve the Budget Status Report on the following pages.

Summary of Budget - Proposed Amendments - All Official Funds
Summary as of Date February 22, 2024

Description	Original Budget	Previously Adopted Budget Amendments: Rolled Over Encumbrances	Previously Adopted Budget Amendments: Other Plan Changes	Previously Adopted Budget Amendments: Fund Balance Neutral Transfers	Revised Budget	Proposed Budget Amendments: Rolled Over Encumbrances	Proposed Budget Amendments: Other Plan Changes	Proposed Budget Amendments: Fund Balance Neutral Transfers	Potential Revised Budget
Beginning Fund Balance	$ 154,026,746	$ -	$ -	$ -	$ 154,026,746	$ -	$ -	$ -	$ 154,026,746
Revenues									
Local	413,402,762	-	(61,919,898)	-	351,482,864	-	14,922	-	351,497,786
State	69,694,803	-	56,323,580	-	126,018,383	-	244,852	-	126,263,235
Federal	22,095,187	-	18,233	-	22,113,420	-	-	-	22,113,420
Total Revenues	505,192,752	-	(5,578,085)	-	499,614,667	-	259,774	-	499,874,441
Expenditures									
Function 11 - Instruction	227,803,407	331,679	2,500,200	(493,924)	230,141,362	-	360,000	136,189	230,637,551
Function 12 - Library/Media Services	6,454,165	54,176	-	(23,878)	6,484,463	-	-	(2,150)	6,482,313
Function 13 - Curriculum/Instructional Staff Development	9,308,330	10,620	-	25,388	9,344,338	-	-	9,048	9,353,386
Function 21 - Instruction Leadership	7,877,451	4,871	5,000	(112,948)	7,774,374	-	-	(19,283)	7,755,091
Function 23 - School Leadership	27,634,725	4,615	-	6,331	27,645,671	-	-	3,225	27,648,896
Function 31 - Guidance / Counseling	20,108,858	67,627	1,383,412	24,482	21,584,379	-	-	(126,750)	21,457,629
Function 32 - Social Work Services	1,504,426	201	-	-	1,504,627	-	-	-	1,504,627
Function 33 - Health Services	6,362,928	269	11,863	62	6,375,122	-	-	-	6,375,122
Function 34 - Student Transportation	9,402,757	67,548	27,906	(70,000)	9,428,211	-	11,800	(45,225)	9,394,786
Function 35 - Child Nutrition	21,435,237	-	-	-	21,355,237	-	-	-	21,355,237
Function 36 - Co-curricular / Extracurricular Activities	6,701,534	24,236	58,942	61,250	6,845,962	-	-	446	6,846,408
Function 41 - General Administration	10,758,791	88,457	21,000	-	10,868,248	-	244,852	-	11,113,100
Function 51 - Maintenance & Operations	34,869,143	439,587	3,038,178	-	38,455,570	-	14,922	41,093	38,511,585
Function 52 - Security Services	2,384,850	2,484	700,000	19,031	3,106,365	-	2,750,000	3,407	5,859,772
Function 53 - Data Processing Services	5,194,734	176,496	-	62,378	5,433,608	-	-	-	5,433,608
Function 61 - Community Services	2,065,429	3,127	49,057	473,166	2,590,779	-	-	-	2,590,779
Function 71 - Debt Administration	79,659,513	-	(5,140,224)	-	74,519,289	-	-	-	74,519,289
Function 72 - Debt Administration	42,357,249	-	-	-	42,357,249	-	-	-	42,357,249
Function 73 - Debt Administration	15,000	-	-	-	15,000	-	-	-	15,000
Function 81 - Facilities Acquisition & Construction	48,000	-	-	-	48,000	-	-	-	48,000
Function 91 - Intergovernmental Charges	5,721,195	-	-	-	5,721,195	-	-	-	5,721,195
Function 92 - Incremental Ch 41 costs	-	-	-	-	-	-	-	-	-
Function 93 - Payments to Member Districts	255,704	-	-	-	255,704	-	-	-	255,704
Function 95 - Payments to JJAEP	50,000	-	20,000	-	70,000	-	-	-	70,000
Function 97 - Payments to Tax Increment	2,875,000	-	-	-	2,875,000	-	-	-	2,875,000
Function 99 - Other Intergovernmental Charges	1,316,566	-	-	-	1,316,566	-	-	-	1,316,566
Total Expenditures	532,164,992	1,275,993	2,675,334	-	536,116,319	-	3,381,574	-	539,497,893
Other Plan Sources (Uses)									
7911 Refunding Bonds Issued	-	-	-	-	-	-	-	-	-
7912 Sale of Real and Personal Property	100,000	-	-	-	100,000	-	11,800	-	111,800
7916 Premium on Issuance of Bonds	-	-	-	-	-	-	-	-	-
7915 Transfers In	-	-	-	-	-	-	-	-	-
8911 Transfers Out	(1,000,000)	-	-	-	(1,000,000)	-	-	-	(1,000,000)
8949 Payment to Refunded Bond Escrow Agent	-	-	-	-	-	-	-	-	-
Total Other Plan Sources (Uses)	(900,000)	-	-	-	(900,000)	-	11,800	-	(888,200)
Ending Fund Balance	$ 126,154,506	$ (1,275,993)	$ (8,253,419)	$ -	$ 116,625,094	$ -	$ (3,110,000)	$ -	$ 113,515,094

Note: The beginning fund balance reflects the 2022-23 ending fund balance per the 2022-23 ACFR less nonspendable balances and restrictions, commitments and assignments in the General Fund.

Summary of Budget - Proposed Amendments - General Operating Fund
Summary as of Date February 22, 2024

Description	Original Budget	Previously Adopted Budget Amendments: Rolled Over Encumbrances	Previously Adopted Budget Amendments: Other Plan Changes	Previously Adopted Budget Amendments: Fund Balance Neutral Transfers	Revised Budget	Proposed Budget Amendments: Rolled Over Encumbrances	Proposed Budget Amendments: Other Plan Changes	Proposed Budget Amendments: Fund Balance Neutral Transfers	Potential Revised Budget
Beginning Fund Balance	$ 104,138,245	$ -	$ -	$ -	$ 104,138,245	$ -	$ -	$ -	$ 104,138,245
Revenues									
Local	299,295,616	-	(56,838,405)	-	242,457,211	-	14,922	-	242,472,133
State	67,995,532	-	56,426,836	-	124,422,368	-	244,852	-	124,667,220
Federal	5,080,000	-	18,233	-	5,098,233	-	-	-	5,098,233
Total Revenues	372,371,148	-	(393,336)	-	371,977,812	-	259,774	-	372,237,586
Expenditures									
Function 11 - Instruction	227,803,407	331,679	2,500,200	(493,924)	230,141,362	-	360,000	136,189	230,637,551
Function 12 - Library/Media Services	6,454,165	54,176	-	(23,878)	6,484,463	-	-	(2,150)	6,482,313
Function 13 - Curriculum/Instructional Staff Development	9,308,330	10,620	-	25,388	9,344,338	-	-	9,048	9,353,386
Function 21 - Instruction Leadership	7,877,451	4,871	5,000	(112,948)	7,774,374	-	-	(19,283)	7,755,091
Function 23 - School Leadership	27,634,725	4,615	-	6,331	27,645,671	-	-	3,225	27,648,896
Function 31 - Guidance / Counseling	20,108,858	67,627	1,383,412	24,482	21,584,379	-	-	(126,750)	21,457,629
Function 32 - Social Work Services	1,504,426	201	-	-	1,504,627	-	-	-	1,504,627
Function 33 - Health Services	6,362,928	269	11,863	62	6,375,122	-	-	-	6,375,122
Function 34 - Student Transportation	9,402,757	67,548	27,906	(70,000)	9,428,211	-	11,800	(45,225)	9,394,786
Function 35 - Child Nutrition	775,600	-	-	-	775,600	-	-	-	775,600
Function 36 - Co-curricular / Extracurricular Activities	6,701,534	24,236	58,942	61,250	6,845,962	-	-	446	6,846,408
Function 41 - General Administration	10,758,791	88,457	21,000	-	10,868,248	-	244,852	-	11,113,100
Function 51 - Maintenance & Operations	34,556,499	439,587	3,038,178	28,662	38,062,926	-	14,922	41,093	38,118,941
Function 52 - Security Services	2,384,850	2,484	700,000	19,031	3,106,365	-	2,750,000	3,407	5,859,772
Function 53 - Data Processing Services	5,194,734	176,496	-	62,378	5,433,608	-	-	-	5,433,608
Function 61 - Community Services	2,064,229	3,127	49,057	473,166	2,589,579	-	-	-	2,589,579
Function 71 - Debt Administration	34,513	-	44,525	-	79,038	-	-	-	79,038
Function 72 - Debt Administration	540	-	-	-	540	-	-	-	540
Function 73 - Debt Administration	-	-	-	-	-	-	-	-	-
Function 81 - Facilities Acquisition & Construction	48,000	-	-	-	48,000	-	-	-	48,000
Function 91 - Intergovernmental Charges	5,721,195	-	-	-	5,721,195	-	-	-	5,721,195
Function 92 - Incremental Ch 41 costs	-	-	-	-	-	-	-	-	-
Function 93 - Payments to Member Districts	255,704	-	-	-	255,704	-	-	-	255,704
Function 95 - Payments to JJAEP	50,000	-	20,000	-	70,000	-	-	-	70,000
Function 97 - Payments to Tax Increment Fund	-	-	-	-	-	-	-	-	-
Function 99 - Other Intergovernmental Charges	1,316,566	-	-	-	1,316,566	-	-	-	1,316,566
Total Expenditures	386,319,802	1,275,993	7,860,083	-	395,455,878	-	3,381,574	-	398,837,452
Other Plan Sources (Uses)									
7911 Refunding Bonds Issued	-		-		-		-		-
7912 Sale of Real and Personal Property	100,000		-		100,000		11,800		111,800
7916 Premium on Issuance of Bonds	-		-		-		-		-
7915 Transfers In	-		-		-		-		-
8911 Transfers Out	(1,000,000)		-		(1,000,000)		-		(1,000,000)
8949 Payment to Refunded Bond Escrow Agent	-		-		-		-		-
Total Other Plan Sources (Uses)	(900,000)		-		(900,000)		11,800		(888,200)
Ending Fund Balance	$ 89,289,591	$ (1,275,993)	$ (8,253,419)	$ -	$ 79,760,179	$ -	$ (3,110,000)	$ -	$ 76,650,179

Note: The beginning fund balance reflects the 2022-23 ending fund balance per the 2022-23 ACFR less nonspendable balances and restrictions, commitments and assignments in the General Fund.

Summary of Budget - Proposed Amendments - Child Nutrition Fund
Summary as of Date February 22, 2024

Description	Original Budget	Previously Adopted Budget Amendments: Rolled Over Encumbrances	Previously Adopted Budget Amendments: Other Plan Changes	Previously Adopted Budget Amendments: Fund Balance Neutral Transfers	Revised Budget	Proposed Budget Amendments: Rolled Over Encumbrances	Proposed Budget Amendments: Other Plan Changes	Proposed Budget Amendments: Fund Balance Neutral Transfers	Potential Revised Budget
Beginning Fund Balance	$ 9,048,501				$ 9,048,501				$ 9,048,501
Revenues									
Local	1,340,500	-	-	-	1,340,500	-	-	-	1,340,500
State	165,000	-	-	-	165,000	-	-	-	165,000
Federal	17,015,187	-	-	-	17,015,187	-	-	-	17,015,187
Total Revenues	18,520,687	-	-	-	18,520,687	-	-	-	18,520,687
Expenditures									
Function 11 - Instruction	-	-	-	-	-	-	-	-	-
Function 12 - Library/Media Services	-	-	-	-	-	-	-	-	-
Function 13 - Curriculum/Instructional Staff Development	-	-	-	-	-	-	-	-	-
Function 21 - Instruction Leadership	-	-	-	-	-	-	-	-	-
Function 23 - School Leadership	-	-	-	-	-	-	-	-	-
Function 31 - Guidance / Counseling	-	-	-	-	-	-	-	-	-
Function 32 - Social Work Services	-	-	-	-	-	-	-	-	-
Function 33 - Health Services	-	-	-	-	-	-	-	-	-
Function 34 - Student Transportation	-	-	-	-	-	-	-	-	-
Function 35 - Child Nutrition	20,659,637	-	-	(80,000)	20,579,637	-	-	-	20,579,637
Function 36 - Co-curricular / Extracurricular Activities	-	-	-	-	-	-	-	-	-
Function 41 - General Administration	-	-	-	-	-	-	-	-	-
Function 51 - Maintenance & Operations	312,644	-	-	80,000	392,644	-	-	-	392,644
Function 52 - Security Services	-	-	-	-	-	-	-	-	-
Function 53 - Data Processing Services	-	-	-	-	-	-	-	-	-
Function 61 - Community Services	1,200	-	-	-	1,200	-	-	-	1,200
Function 71 - Debt Administration	-	-	-	-	-	-	-	-	-
Function 72 - Debt Administration	-	-	-	-	-	-	-	-	-
Function 73 - Debt Administration	-	-	-	-	-	-	-	-	-
Function 81 - Facilities Acquisition & Construction	-	-	-	-	-	-	-	-	-
Function 91 - Intergovernmental Charges	-	-	-	-	-	-	-	-	-
Function 92 - Incremental Ch 41 costs	-	-	-	-	-	-	-	-	-
Function 93 - Payments to Member Districts	-	-	-	-	-	-	-	-	-
Function 95 - Payments to JJAEP	-	-	-	-	-	-	-	-	-
Function 97 - Payments to Tax Increment Fund	-	-	-	-	-	-	-	-	-
Function 99 - Other Intergovernmental Charges	-	-	-	-	-	-	-	-	-
Total Expenditures	20,973,481	-	-	-	20,973,481	-	-	-	20,973,481
Other Plan Sources (Uses)									
7911 Refunding Bonds Issued	-				-		-		-
7912 Sale of Real and Personal Property	-				-		-		-
7916 Premium on Issuance of Bonds	-				-		-		-
7915 Transfers In	-				-		-		-
8911 Transfers Out	-				-		-		-
8949 Payment to Refunded Bond Escrow Agent	-				-		-		-
Total Other Plan Sources (Uses)	-		-		-		-		-
Ending Fund Balance	$ 6,595,707	$ -	$ -	$ -	$ 6,595,707	$ -	$ -	$ -	$ 6,595,707

Note: The beginning fund balance reflects the 2022-23 ending fund balance less nonspendable balances per the 2022-23 ACFR.

Summary of Budget - Proposed Amendments - Debt Service Fund
Summary as of Date February 22, 2024

Description	Original Budget	Previously Adopted Budget Amendments: Rolled Over Encumbrances	Previously Adopted Budget Amendments: Other Plan Changes	Previously Adopted Budget Amendments: Fund Balance Neutral Transfers	Revised Budget	Proposed Budget Amendments: Rolled Over Encumbrances	Proposed Budget Amendments: Other Plan Changes	Proposed Budget Amendments: Fund Balance Neutral Transfers	Potential Revised Budget
Beginning Fund Balance	$ 40,840,000				$ 40,840,000				$ 40,840,000
Revenues									
Local	112,766,646	-	(5,081,493)	-	107,685,153	-	-	-	107,685,153
State	1,534,271	-	(103,256)	-	1,431,015	-	-	-	1,431,015
Federal	-	-	-	-	-	-	-	-	-
Total Revenues	114,300,917	-	(5,184,749)	-	109,116,168	-	-	-	109,116,168
Expenditures									
Function 11 - Instruction	-	-	-	-	-	-		-	-
Function 12 - Library/Media Services	-	-	-	-	-	-	-	-	-
Function 13 - Curriculum/Instructional Staff Development	-	-	-	-	-	-	-	-	-
Function 21 - Instruction Leadership	-	-	-	-	-	-	-	-	-
Function 23 - School Leadership	-	-	-	-	-	-	-	-	-
Function 31 - Guidance / Counseling	-	-	-	-	-	-	-	-	-
Function 32 - Social Work Services	-	-	-	-	-	-	-	-	-
Function 33 - Health Services	-	-	-	-	-	-	-	-	-
Function 34 - Student Transportation	-	-	-	-	-	-	-	-	-
Function 35 - Child Nutrition	-	-	-	-	-	-	-	-	-
Function 36 - Co-curricular / Extracurricular Activities	-	-	-	-	-	-	-	-	-
Function 41 - General Administration	-	-	-	-	-	-	-	-	-
Function 51 - Maintenance & Operations	-	-	-	-	-	-	-	-	-
Function 52 - Security Services	-	-	-	-	-	-	-	-	-
Function 53 - Data Processing Services	-	-	-	-	-	-	-	-	-
Function 61 - Community Services	-	-	-	-	-	-	-	-	-
Function 71 - Debt Administration	79,625,000	-	(5,184,749)	-	74,440,251	-	-	-	74,440,251
Function 72 - Debt Administration	42,356,709	-	-		42,356,709	-	-		42,356,709
Function 73 - Debt Administration	15,000	-	-	-	15,000	-	-	-	15,000
Function 81 - Facilities Acquisition & Construction	-	-	-	-	-	-	-	-	-
Function 91 - Intergovernmental Charges	-	-	-	-	-	-	-	-	-
Function 92 - Incremental Ch 41 costs	-	-	-	-	-	-	-	-	-
Function 93 - Payments to Member Districts	-	-	-	-	-	-	-	-	-
Function 95 - Payments to JJAEP	-	-	-	-	-	-	-	-	-
Function 97 - Payments to Tax Increment Fund	2,875,000	-	-	-	2,875,000	-	-	-	2,875,000
Function 99 - Other Intergovernmental Charges	-	-	-	-	-	-	-	-	-
Total Expenditures	124,871,709	-	(5,184,749)	-	119,686,960	-	-	-	119,686,960
Other Plan Sources (Uses)									
7911 Refunding Bonds Issued	-		-		-	-	-	-	-
7912 Sale of Real and Personal Property	-		-		-	-		-	-
7916 Premium on Issuance of Bonds	-		-		-	-	-	-	-
7915 Transfers In	-				-	-		-	-
8911 Transfers Out	-				-	-		-	-
8949 Payment to Refunded Bond Escrow Agent	-		-		-	-	-	-	-
Total Other Plan Sources (Uses)	-		-		-	-	-	-	-
Ending Fund Balance	$ 30,269,208	$ -	$ -	$ -	$ 30,269,208	$ -	$ -	$ -	$ 30,269,208

Note: The beginning fund balance reflects the 2022-23 ending fund balance less nonspendable balances per the 2022-23 ACFR.

BOARD MEETING
February 22, 2024

FUND BALANCE NEUTRAL CHANGES - OPERATING FUND (199)

	ACCOUNTS	REASON	AMOUNT
From	199.11.62490.949.11.0000.949.000	Other Cont Maint and Repair	(200.00)
To	199.11.64991.839.11.0000.839.000	Food Consumed by Students	1,630.00
From	199.11.62491.867.11.0000.736.000	Cont Maint and Repair Equip	(4,500.00)
From	199.11.63990.949.11.1025.949.000	Other Supplies and Materials	(300.00)
To	199.11.62990.876.23.0000.876.000	Misc Contracted Services	129,000.00
From	199.11.63210.146.11.0000.000.000	Other Instructional Materials	(250.00)
To	199.11.63991.103.11.1600.000.000	Consumable Supplies Teaching	2,000.00
To	199.11.63991.103.11.1600.000.000	Consumable Supplies Teaching	150.00
From	199.11.63991.045.11.1600.000.000	Consumable Supplies Teaching	(4,291.00)
To	199.11.63990.889.11.0000.889.000	Other Supplies and Materials	3,000.00
From	199.11.63210.894.11.0000.894.000	Other Instructional Materials	(2,000.00)
To	199.11.63290.839.11.0000.839.000	Other Reading Materials	1,950.00
To	199.11.64995.002.11.0000.000.000	HS Graduation Expenses	2,500.00
To	199.11.64995.005.11.0000.000.000	HS Graduation Expenses	2,500.00
To	199.11.64995.004.11.0000.000.000	HS Graduation Expenses	2,500.00
To	199.11.64995.003.11.0000.000.000	HS Graduation Expenses	2,500.00
TOTAL FUNCTION 11			**136,189.00**
From	199.12.63293.103.99.2517.000.000	Library Books Media less 5K	(2,000.00)
From	199.12.63990.103.99.2517.000.000	Other Supplies and Materials	(150.00)
TOTAL FUNCTION 12			**(2,150.00)**
To	199.13.64110.949.99.1025.949.000	Travel, Train, Subsistence EE	200.00
To	199.13.64110.949.99.1025.949.000	Travel, Train, Subsistence EE	1,300.00
To	199.13.64992.839.99.0000.839.000	Food Consumed by EE Onsite	257.00
To	199.13.61170.900.99.0000.900.000	Xtra Pay OT Prof Personnel	4,000.00
To	199.13.64110.045.99.0000.000.000	Travel, Train, Subsistence EE	4,291.00
From	199.13.61170.889.99.0000.889.000	Xtra Pay OT Prof Personnel	(3,000.00)
To	199.13.64110.894.99.0000.894.000	Travel, Train, Subsistence EE	2,000.00
TOTAL FUNCTION 13			**9,048.00**
From	199.21.63990.838.99.0000.838.000	Other Supplies and Materials	(1,630.00)
From	199.21.63990.838.99.0000.838.000	Other Supplies and Materials	(257.00)
From	199.21.63990.884.99.0000.884.000	Other Supplies and Materials	(1,446.00)
From	199.21.63990.838.99.0000.838.000	Other Supplies and Materials	(4,000.00)
From	199.21.63990.838.99.0000.838.000	Other Supplies and Materials	(1,950.00)
From	199.21.63990.838.99.0000.838.000	Other Supplies and Materials	(10,000.00)
TOTAL FUNCTION 21			**(19,283.00)**
To	199.23.64992.146.99.0000.000.000	Food Consumed by EE Onsite	250.00
To	199.23.64110.931.99.0000.931.000	Travel, Train, Subsistence EE	2,475.00
To	199.23.64110.931.99.0000.931.000	Travel, Train, Subsistence EE	500.00
TOTAL FUNCTION 23			**3,225.00**
From	199.31.62990.876.23.0000.876.000	Misc Contracted Services	(129,000.00)
To	199.31.64110.931.99.0000.931.000	Travel, Train, Subsistence EE	2,250.00
TOTAL FUNCTION 31			**(126,750.00)**
From	199.34.64110.931.99.0000.931.000	Travel, Train, Subsistence EE	(2,250.00)
From	199.34.63111.931.99.0000.931.000	Gasoline Other Fuel Buses	(15,000.00)
From	199.34.64110.931.99.0000.931.000	Travel, Train, Subsistence EE	(2,475.00)
From	199.34.64110.931.99.0000.931.000	Travel, Train, Subsistence EE	(500.00)
From	199.34.63111.931.99.0000.931.000	Gasoline Other Fuel Buses	(20,000.00)
From	199.34.63111.931.99.0000.931.000	Gasoline Other Fuel Buses	(5,000.00)
TOTAL FUNCTION 34			**(45,225.00)**

FUND BALANCE NEUTRAL CHANGES - OPERATING FUND (199)

	ACCOUNTS	REASON	AMOUNT
From	199.36.64120.949.99.1025.949.000	Student Travel and Training	(1,300.00)
To	199.36.64990.949.99.1025.949.000	Other Misc Operating Cost	300.00
To	199.36.61180.005.91.0000.997.000	Other Supplements/Stipends Pro	1,446.00
TOTAL FUNCTION 36			**446.00**
To	199.51.62591.867.99.0000.736.000	Utilities Telecommunication	4,500.00
To	199.51.62594.919.99.0000.937.000	Utilities Electricity	3,467.21
To	199.51.62594.920.99.0000.937.000	Utilities Electricity	3,178.39
From	199.51.62594.937.99.0000.996.000	Utilities Electricity	(10,582.00)
To	199.51.62594.919.99.0000.937.000	Utilities Electricity	528.97
To	199.51.63110.931.99.0000.931.000	Gasoline Other Fuel Vehicles	15,000.00
To	199.51.63110.931.99.0000.931.000	Gasoline Other Fuel Vehicles	20,000.00
To	199.51.63110.931.99.0000.931.000	Gasoline Other Fuel Vehicles	5,000.00
TOTAL FUNCTION 51			**41,092.57**
To	199.52.62490.919.99.0000.934.000	Other Cont Maint and Repair	2,349.79
To	199.52.62490.920.99.0000.934.000	Other Cont Maint and Repair	1,057.64
TOTAL FUNCTION 52			**3,407.43**
TOTAL FUND BALANCE NEUTRAL CHANGES - OPERATING FUND (199)			**0.00**

OTHER PLAN CHANGES - OPERATING FUND (199)

	ACCOUNTS	REASON	AMOUNT
To	199.11.62990.876.23.0000.876.000	Contracted SPED services	260,000.00
To	199.11.64995.xxxx.11.0000.900.000	Graduation expenses	100,000.00
TOTAL FUNCTION 11			**360,000.00**
To	199.34.62492.931.99.0000.931.000	Bus auction proceeds	11,800.00
TOTAL FUNCTION 34			**11,800.00**
To	199.41.62110.703.99.0000.703.000	Property tax audit	244,852.00
TOTAL FUNCTION 41			**244,852.00**
To	199.51.62492.931.99.2563.931.000	Insurance Recovery Vehicles Transportation	14,922.00
TOTAL FUNCTION 51			**14,922.00**
To	199.52.61190.936.99.0000.997.000	Security officiers	1,500,000.00
To	199.52.62990.936.99.0000.936.000	Security contracted and other	1,250,000.00
TOTAL FUNCTION 52			**2,750,000.00**
TOTAL OTHER PLAN CHANGES - OPERATING FUND (199)			**3,381,574.00**

BOARD OF TRUSTEES
Richardson Independent School District
Richardson, Texas

Date: February 22, 2024

Submitted by: David Pate, Assistant Superintendent of Finance and Support Services

ACTION ITEM

TOPIC: Quarterly Investment Report

BACKGROUND INFORMATION

The District is required by the Public Funds Investment Act (the "Act"), Chapter 2256 of the Government Code, to report on at least a quarterly basis information regarding the District's investment portfolio. Board Policy CDA (Local) requires that the Investment Officer prepare on a quarterly basis an investment report which presents the cost and market basis of all investments held by the District as well as a statement as to the compliance with District policy.

SUPERINTENDENT'S RECOMMENDATION

The Superintendent recommends that the District approve the Investment Report for the quarter ended December 31, 2023, as submitted by the Investment Officers.

RESOLUTION

WHEREAS, the District is required by the Public Funds Investment Act (the "Act"), Chapter 2256 of the Government Code and Board Policy CDA (Local) to regularly review the Investment portfolio of the District.

THEREFORE, BE IT RESOLVED that the Board of Trustees of the Richardson Independent School District approves the Investment Report for the quarter ended December 31, 2023, as submitted by the Investment Officers.

INVESTMENT REPORT

Richardson ISD

October 1 to December 31, 2023

HilltopSecurities

Contents

Market Recap 3
Investment Officers' Certification 4
Portfolio Overview 5
Portfolio Overview 6
Asset Allocation 7
Credit Rating Summary 8
Benchmark Comparison 9
Fund Overview 10
Detail of Security Holdings 11
Earned Income 13
Investment Transactions 15
Investment Transactions Totals 17
Amortization and Accretion 18
Projected Cash Flows 20
Projected Cash Flows Totals 21
Disclosures & Disclaimers 22

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Market Recap

The November bond market rally (the strongest since 1985) continued in December, driving the 12-month Treasury-bill yield to its lowest level since May. Whereas in November, the rally primarily resulted from an intangible shift in investor sentiment, December gains were fueled by encouraging progress on inflation and a growing sense that the Fed had not only completed its tightening campaign but would soon begin to cut rates.

There were plenty of economy releases to sift through in December, and although most of the data suggested growth was moderating in the final quarter of the year, the overriding theme was that inflation was retreating faster than expected. Fed officials had indicated all year that unemployment would have to rise, and GDP would have to weaken significantly in order to wrangle inflation down to their +2.0% target, but the idea that positive growth could coexist with lower prices became more of a reality as the year drew to a close.

The November CPI numbers were mostly on target. Falling prices at the gas pump contributed to a benign +0.1% rise in the overall number, while persistent housing costs pushed the core rate up +0.3% for the month. On a year-over basis, overall CPI retreated from +3.2% to +3.1%, while core CPI remained at +4.0%. But it was the second-tier inflation data that drew the attention of investors . . . and likely Fed officials. The November personal consumption expenditures (PCE) index fell -0.1% and core PCE rose just +0.1%, while the previous month's core reading was revised downward from +0.2% to +0.1%. On a year-over-year basis, the overall PCE price index was increasing at a +2.6% pace, and core PCE at a +3.2% rate. More importantly, over the last six months core PCE was up by just +1.9% on an annualized basis, indicating that the inflation measure preferred by Fed officials seemed to be on target through November. Adding to the positive inflation news was a downward revision to third quarter core PCE from +2.3% to +2.0%.

The FOMC meeting on December 21st turned out to be the most important news event of the month, (possibly the year). Fed officials, as expected, held the overnight target rate steady for the third straight meeting, while the updated dot plot (also no surprise) showed a lower funds rate at the end of next year. At the post-meeting press conference, Chairman Jay Powell began his prepared comments by declaring inflation was still too high and added that the committee was proceeding carefully, which should have signaled a continuation of the Fed's patient, wait-and-see approach. In the Q&A that followed, Powell even mentioned that it was premature to declare victory on inflation, which hinted it was too early to dismiss the idea of rate hikes. But what the markets actually heard, loud and clear, was Powell's admission that the FOMC had discussed the timing of rate cuts. Until this point, rate cuts had not been mentioned at all by policymakers. In fact, the September dot plot had actually indicated one more 25 basis point hike this year, followed by two cuts in 2024. The December dot plot showed (just) three rates cuts next year. If sentiment wasn't so firmly established, investors might have recognized that the rally had already moved beyond Fed forecasts and sold off, but the buying frenzy just accelerated further. By the end of the December, the futures market had priced-in more than six rate cuts for next year, starting at the March FOMC meeting.

Whether Fed officials "proceed carefully" with just three cuts beginning in the second half of the year or follow the market's more aggressive lead, remains to be seen. The next move by committee members will most certainly be a rate cut, the questions are now *when will the rate cuts begin?* and *how low will the Fed go?*

Investment Officers' Certification

This report is prepared for the Richardson ISD (the "Entity") in accordance with Chapter 2256 of the Texas Public Funds Investment Act ("PFIA"). Section 2256.023(a) of the PFIA states that: "Not less than quarterly, the investment officer shall prepare and submit to the governing body of the entity a written report of the investment transactions for all funds covered by this chapter for the preceding reporting period." This report is signed by the Entity's investment officers and includes the disclosures required in the PFIA.

The investment portfolio complied with the PFIA and the Entity's approved Investment Policy and Strategy throughout the period. All investment transactions made in the portfolio during this period were made on behalf of the Entity and were made in full compliance with the PFIA and the approved Investment Policy.

Investment Officers

David Pate

David Pate
Asst. Superintendent of Finance

Allison Davenport

Allison Davenport
Executive Director of Finance

LeAngiela Drake

LeAngiela Drake
Cash Manager

Portfolio Overview

Portfolio Summary

	Prior 30 Sep-23	Current 31 Dec-23
Par Value	474,846,512.97	460,018,857.09
Original Cost	471,174,228.23	456,803,292.05
Book Value	473,083,119.96	457,725,204.14
Market Value	472,930,792.61	457,772,453.09
Accrued Interest	261,102.78	163,852.78
Book Value Plus Accrued	473,344,222.73	457,889,056.92
Market Value Plus Accrued	473,191,895.39	457,936,305.87
Net Unrealized Gain/(Loss)	(152,327.35)	47,248.95

Income Summary

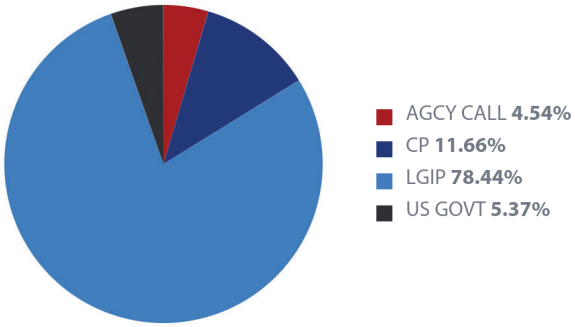
Current Period	1 Oct-23 to 31 Dec-23
Interest Income	4,781,348.41
Net Amortization/Accretion	1,236,300.93
Realized Gain/(Loss)	0.00
Net Income	6,017,649.34

Fiscal Year-to-Date	1 Jul-23 to 31 Dec-23
Net Income	12,887,367.91

Portfolio Characteristics

	Prior 30 Sep-23	Current 31 Dec-23
Yield to Maturity	5.311%	5.398%
Yield to Worst	5.311%	5.398%
Days to Final Maturity	33	38
Days to Effective Maturity	33	38
Duration	0.21	0.47

Asset Allocation

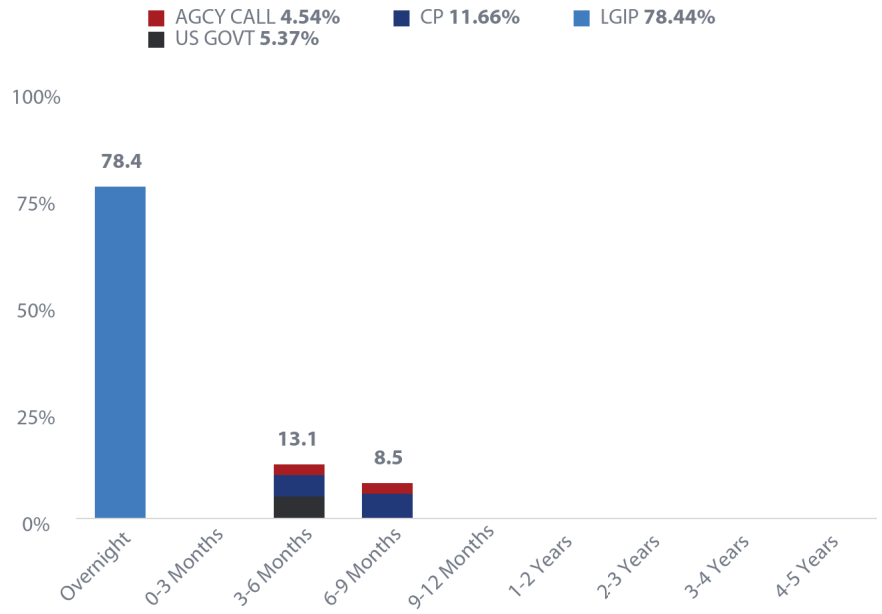


Transaction Summary

Transaction Type	Quantity	Principal	Interest	Total Amount	Realized Gain/Loss
Buy	55,000,000.00	(53,233,439.13)	0.00	(53,233,439.13)	0.00
Maturity	(93,000,000.00)	93,000,000.00	0.00	93,000,000.00	0.00
Coupon	0.00	0.00	275,000.00	275,000.00	0.00

Portfolio Overview

Maturity Distribution by Security Type



Top Ten Holdings

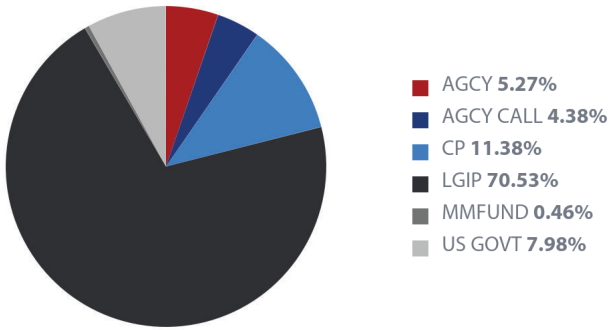
Issuer	Allocation
TEXPOOL	64.38%
TEXSTAR	8.14%
Toyota Motor Credit Corporation	6.33%
LONESTRGOV	5.91%
United States Department of The Treasury	5.37%
Royal Bank of Canada	5.32%
Federal National Mortgage Association	2.40%
Federal Home Loan Banks	2.14%

Maturity Distribution by Security Type

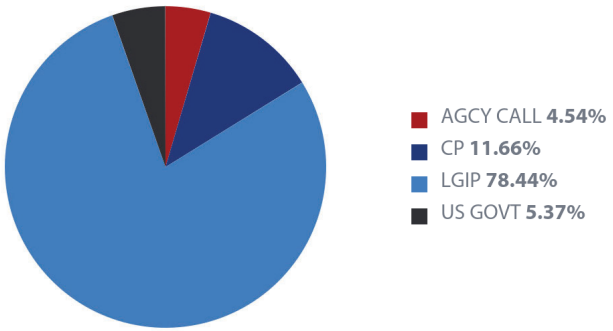
Security Type	Overnight	0-3 Months	3-6 Months	6-9 Months	9-12 Months	1-2 Years	2-3 Years	3-4 Years	4-5 Years	Portfolio Total
AGCY CALL	--	--	11,000,000.00	9,796,471.09	--	--	--	--	--	**20,796,471.09**
CP	--	--	24,357,187.50	28,992,758.33	--	--	--	--	--	**53,349,945.82**
LGIP	359,018,857.09	--	--	--	--	--	--	--	--	**359,018,857.09**
US GOVT	--	--	24,559,930.14	--	--	--	--	--	--	**24,559,930.14**
Total	**359,018,857.09**	**--**	**59,917,117.63**	**38,789,229.41**	**--**	**--**	**--**	**--**	**--**	**457,725,204.14**

Asset Allocation

Asset Allocation by Security Type as of 30-Sep-2023



Asset Allocation by Security Type as of 31-Dec-2023



Book Value Basis Security Distribution

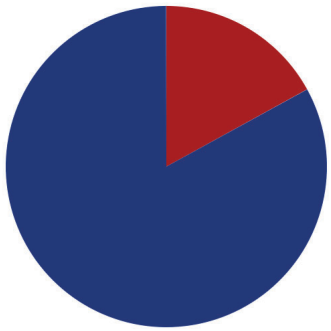
Security Type	Prior Balance 30-Sep-23	Prior Allocation 30-Sep-23	Change in Allocation	Current Balance 31-Dec-23	Current Allocation 31-Dec-23	Yield to Maturity
AGCY	24,947,546.81	5.27%	(5.27%)	0.00	0.00%	
AGCY CALL	20,721,361.72	4.38%	0.16%	20,796,471.09	4.54%	4.870%
CP	53,826,770.83	11.38%	0.28%	53,349,945.82	11.66%	5.829%
LGIP	333,675,273.47	70.53%	7.90%	359,018,857.09	78.44%	5.365%
MMFUND	2,171,239.50	0.46%	(0.46%)	0.00	0.00%	
US GOVT	37,740,927.63	7.98%	(2.61%)	24,559,930.14	5.37%	5.395%
Portfolio Total	**473,083,119.96**	**100.00%**		**457,725,204.14**	**100.00%**	**5.398%**

Credit Rating Summary

Rating Distribution

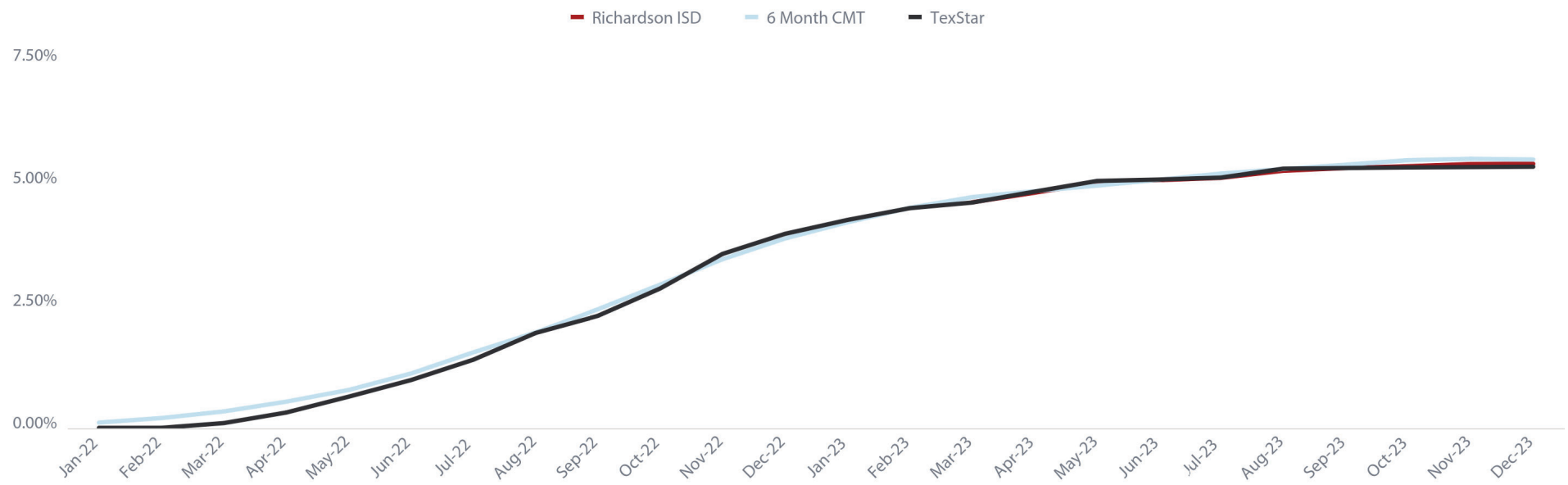
	Book Value	Portfolio Allocation
Local Government Investment Pools & Money Market Funds		
AAA	359,018,857.09	78.44%
Total Local Government Investment Pools & Money Market Funds	**359,018,857.09**	**78.44%**
Short Term Rating Distribution		
A-1+	77,909,875.96	17.02%
Total Short Term Rating Distribution	**77,909,875.96**	**17.02%**
Long Term Rating Distribution		
AAA	20,796,471.09	4.54%
Total Long Term Rating Distribution	**20,796,471.09**	**4.54%**
Portfolio Total	**457,725,204.14**	**100.00%**

Allocation by Rating



A-1+ **17.02%** AAA **82.98%**

Benchmark Comparison



Yield Overview

	Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23
Richardson ISD	–	–	–	–	–	–	–	–	–	–	–	–	–	–	**4.61**	**4.81**	**5.01**	**5.06**	**5.11**	**5.26**	**5.31**	**5.35**	**5.39**	**5.40**
6 Month CMT	0.12	0.21	0.34	0.54	0.78	1.12	1.55	1.96	2.43	2.93	3.45	3.87	4.20	4.50	4.72	4.84	4.95	5.07	5.20	5.29	5.38	5.47	5.50	5.48
TexStar	0.01	0.01	0.11	0.32	0.65	0.98	1.40	1.95	2.29	2.85	3.56	3.97	4.25	4.49	4.61	4.83	5.05	5.08	5.11	5.30	5.31	5.32	5.33	5.34

Fund Overview

Fund Name	Prior Book Value	Prior Market Value	Changes to Market Value	Current Book Value	Current Market Value	Net Income	Days to Final Mty	YTM	YTW
199-General Operating Fund	192,515,087.60	192,494,097.48	27,733,137.01	220,216,782.27	220,227,234.49	2,432,970.58	13	5.373%	5.373%
240-Food Service Fund	8,036,151.84	8,036,566.31	1,423,857.87	9,460,424.18	9,460,424.18	108,646.96	1	5.369%	5.369%
497-Permanent Local School Fund	22,935,985.52	22,838,641.46	397,705.91	23,261,403.84	23,236,347.37	290,668.33	178	5.094%	5.094%
599-Debt Service Fund	14,997,324.40	14,997,324.40	1,328,097.81	16,325,422.21	16,325,422.21	193,348.86	1	5.369%	5.369%
629-Special Capital Projects	4,404,510.36	4,404,510.36	4,585.03	4,409,095.39	4,409,095.39	57,852.30	1	5.369%	5.369%
644-Cap Proj/2016 Construction	18,265,462.06	18,265,462.06	214,231.44	18,479,693.50	18,479,693.50	248,141.54	1	5.369%	5.369%
650-Cap Proj/2021 Construction	209,479,243.76	209,444,836.12	(46,153,440.58)	163,229,542.34	163,291,395.54	2,654,120.12	63	5.484%	5.484%
755-Workers' Compensation Fund	2,449,354.42	2,449,354.42	(106,514.01)	2,342,840.41	2,342,840.41	31,900.66	1	5.369%	5.369%
Total	**473,083,119.96**	**472,930,792.61**	**(15,158,339.52)**	**457,725,204.14**	**457,772,453.09**	**6,017,649.34**	**38**	**5.398%**	**5.398%**

Detail of Security Holdings

CUSIP	Settle Date	Security Type	Security Description	CPN	Maturity Date	Next Call Date	Call Type	Par Value	Purch Price	Original Cost	Book Value	Mkt Price	Market Value	Days to Mty	Days to Call	YTM	YTW	Rating
199-General Operating Fund																		
LNSTGOV		LGIP	LoneStar Gov O/N		12/31/23			27,054,977.36	100.000	27,054,977.36	27,054,977.36	100.000	27,054,977.36	1		5.354	5.354	AAA
TEXPOOL		LGIP	TexPool		12/31/23			141,236,655.14	100.000	141,236,655.14	141,236,655.14	100.000	141,236,655.14	1		5.369	5.369	AAA
TEXSTAR		LGIP	TexSTAR		12/31/23			37,260,896.99	100.000	37,260,896.99	37,260,896.99	100.000	37,260,896.99	1		5.338	5.338	AAA
3135GAGS4	04/18/23	AGCY CALL	FNMA	5.000	04/18/24		Expired	5,000,000.00	100.000	5,000,000.00	5,000,000.00	99.867	4,993,355.00	109		5.000	5.000	AAA
89233GH58	11/10/23	CP	Toyota Motor Credit Corp	0.000	08/05/24			10,000,000.00	95.838	9,583,797.22	9,664,252.78	96.814	9,681,350.00	218		5.812	5.812	A-1+
Total 199-General Operating Fund								**220,552,529.49**		**220,136,326.71**	**220,216,782.27**		**220,227,234.49**	**13**		**5.373**	**5.373**	
240-Food Service Fund																		
TEXPOOL		LGIP	TexPool		12/31/23			9,460,424.18	100.000	9,460,424.18	9,460,424.18	100.000	9,460,424.18	1		5.369	5.369	AAA
Total 240-Food Service Fund								**9,460,424.18**		**9,460,424.18**	**9,460,424.18**		**9,460,424.18**	**1**		**5.369**	**5.369**	
497-Permanent Local School Fund																		
TEXPOOL		LGIP	TexPool		12/31/23			2,632,806.37	100.000	2,632,806.37	2,632,806.37	100.000	2,632,806.37	1		5.369	5.369	AAA
3135GAGS4	04/18/23	AGCY CALL	FNMA	5.000	04/18/24		Expired	6,000,000.00	100.000	6,000,000.00	6,000,000.00	99.867	5,992,026.00	109		5.000	5.000	AAA
89233GH58	11/10/23	CP	Toyota Motor Credit Corp	0.000	08/05/24			5,000,000.00	95.838	4,791,898.61	4,832,126.39	96.814	4,840,675.00	218		5.812	5.812	A-1+
3130AQV26	03/31/23	AGCY CALL	FHLB	1.610	09/04/24	02/04/24	Monthly	10,000,000.00	95.756	9,575,600.00	9,796,471.09	97.708	9,770,840.00	248	35	4.724	4.724	AAA
Total 497-Permanent Local School Fund								**23,632,806.37**		**23,000,304.98**	**23,261,403.84**		**23,236,347.37**	**178**	**35**	**5.094**	**5.094**	
599-Debt Service Fund																		
TEXPOOL		LGIP	TexPool		12/31/23			16,325,422.21	100.000	16,325,422.21	16,325,422.21	100.000	16,325,422.21	1		5.369	5.369	AAA
Total 599-Debt Service Fund								**16,325,422.21**		**16,325,422.21**	**16,325,422.21**		**16,325,422.21**	**1**		**5.369**	**5.369**	
629-Special Capital Projects																		
TEXPOOL		LGIP	TexPool		12/31/23			4,409,095.39	100.000	4,409,095.39	4,409,095.39	100.000	4,409,095.39	1		5.369	5.369	AAA

Detail of Security Holdings

CUSIP	Settle Date	Security Type	Security Description	CPN	Maturity Date	Next Call Date	Call Type	Par Value	Purch Price	Original Cost	Book Value	Mkt Price	Market Value	Days to Mty	Days to Call	YTM	YTW	Rating
Total 629-Special Capital Projects								**4,409,095.39**		**4,409,095.39**	**4,409,095.39**		**4,409,095.39**	**1**		**5.369**	**5.369**	
644-Cap Proj/2016 Construction																		
TEXPOOL		LGIP	TexPool		12/31/23			18,479,693.50	100.000	18,479,693.50	18,479,693.50	100.000	18,479,693.50	1		5.369	5.369	AAA
Total 644-Cap Proj/2016 Construction								**18,479,693.50**		**18,479,693.50**	**18,479,693.50**		**18,479,693.50**	**1**		**5.369**	**5.369**	
650-Cap Proj/2021 Construction																		
TEXPOOL		LGIP	TexPool		12/31/23			99,816,045.54	100.000	99,816,045.54	99,816,045.54	100.000	99,816,045.54	1		5.369	5.369	AAA
912797JM0	12/12/23	US GOVT	U.S. Treasury Bill	0.000	04/09/24			15,000,000.00	98.270	14,740,520.50	14,784,130.50	98.582	14,787,258.30	100		5.414	5.414	A-1+
912797HT7	12/08/23	US GOVT	U.S. Treasury Bill	0.000	06/06/24			10,000,000.00	97.415	9,741,526.97	9,775,799.64	97.812	9,781,166.70	158		5.365	5.365	A-1+
78009AFE9	09/25/23	CP	Royal Bank of Canada	0.000	06/14/24			25,000,000.00	95.902	23,975,395.83	24,357,187.50	97.540	24,384,900.00	166		5.850	5.850	A-1+
89233GH58	11/10/23	CP	Toyota Motor Credit Corp	0.000	08/05/24			15,000,000.00	95.838	14,375,695.83	14,496,379.16	96.814	14,522,025.00	218		5.812	5.812	A-1+
Total 650-Cap Proj/2021 Construction								**164,816,045.54**		**162,649,184.67**	**163,229,542.34**		**163,291,395.54**	**63**		**5.484**	**5.484**	
755-Workers' Compensation Fund																		
TEXPOOL		LGIP	TexPool		12/31/23			2,342,840.41	100.000	2,342,840.41	2,342,840.41	100.000	2,342,840.41	1		5.369	5.369	AAA
Total 755-Workers' Compensation Fund								**2,342,840.41**		**2,342,840.41**	**2,342,840.41**		**2,342,840.41**	**1**		**5.369**	**5.369**	
Grand Total								**460,018,857.09**		**456,803,292.05**	**457,725,204.14**		**457,772,453.09**	**38**	**35**	**5.398**	**5.398**	

Earned Income

CUSIP	Security Type	Security Description	Beginning Accrued	Interest Earned	Interest Rec'd/ Sold/Matured	Interest Purchased	Ending Accrued	Disc Accr/Prem Amort	Net Realized Gain/Loss	Net Income
199-General Operating Fund										
912797HA8	US GOVT	U.S. Treasury Bill	0.00	0.00	0.00	0.00	0.00	13,103.75	0.00	13,103.75
89233HYA6	CP	Toyota Motor Credit Corp	0.00	0.00	0.00	0.00	0.00	57,333.33	0.00	57,333.33
LNSTGOV	LGIP	LoneStar Gov O/N	0.00	361,069.77	361,069.77	0.00	0.00	0.00	0.00	361,069.77
PROS-RCH	MMFUND	Prosperity Bk	0.00	12,781.03	12,781.03	0.00	0.00	0.00	0.00	12,781.03
TEXPOOL	LGIP	TexPool	0.00	1,349,571.93	1,349,571.93	0.00	0.00	0.00	0.00	1,349,571.93
TEXSTAR	LGIP	TexSTAR	0.00	496,155.21	496,155.21	0.00	0.00	0.00	0.00	496,155.21
3135GAGS4	AGCY CALL	FNMA	113,194.44	62,500.00	125,000.00	0.00	50,694.44	0.00	0.00	62,500.00
89233GH58	CP	Toyota Motor Credit Corp	0.00	0.00	0.00	0.00	0.00	80,455.56	0.00	80,455.56
Total 199-General Operating Fund			**113,194.44**	**2,282,077.94**	**2,344,577.94**	**0.00**	**50,694.44**	**150,892.64**	**0.00**	**2,432,970.58**
240-Food Service Fund										
912797HA8	US GOVT	U.S. Treasury Bill	0.00	0.00	0.00	0.00	0.00	3,931.13	0.00	3,931.13
TEXPOOL	LGIP	TexPool	0.00	104,715.83	104,715.83	0.00	0.00	0.00	0.00	104,715.83
Total 240-Food Service Fund			**0.00**	**104,715.83**	**104,715.83**	**0.00**	**0.00**	**3,931.13**	**0.00**	**108,646.96**
497-Permanent Local School Fund										
89233HYA6	CP	Toyota Motor Credit Corp	0.00	0.00	0.00	0.00	0.00	28,666.67	0.00	28,666.67
TEXPOOL	LGIP	TexPool	0.00	31,414.52	31,414.52	0.00	0.00	0.00	0.00	31,414.52
3135GAGS4	AGCY CALL	FNMA	135,833.33	75,000.00	150,000.00	0.00	60,833.33	0.00	0.00	75,000.00
89233GH58	CP	Toyota Motor Credit Corp	0.00	0.00	0.00	0.00	0.00	40,227.78	0.00	40,227.78
3130AQV26	AGCY CALL	FHLB	12,075.00	40,250.00	0.00	0.00	52,325.00	75,109.36	0.00	115,359.36
Total 497-Permanent Local School Fund			**147,908.33**	**146,664.52**	**181,414.52**	**0.00**	**113,158.33**	**144,003.81**	**0.00**	**290,668.33**
599-Debt Service Fund										
TEXPOOL	LGIP	TexPool	0.00	193,348.86	193,348.86	0.00	0.00	0.00	0.00	193,348.86

Earned Income

CUSIP	Security Type	Security Description	Beginning Accrued	Interest Earned	Interest Rec'd/ Sold/Matured	Interest Purchased	Ending Accrued	Disc Accr/Prem Amort	Net Realized Gain/Loss	Net Income
Total 599-Debt Service Fund			**0.00**	**193,348.86**	**193,348.86**	**0.00**	**0.00**	**0.00**	**0.00**	**193,348.86**
629-Special Capital Projects										
TEXPOOL	LGIP	TexPool	0.00	57,852.30	57,852.30	0.00	0.00	0.00	0.00	57,852.30
Total 629-Special Capital Projects			**0.00**	**57,852.30**	**57,852.30**	**0.00**	**0.00**	**0.00**	**0.00**	**57,852.30**
644-Cap Proj/2016 Construction										
TEXPOOL	LGIP	TexPool	0.00	248,141.54	248,141.54	0.00	0.00	0.00	0.00	248,141.54
Total 644-Cap Proj/2016 Construction			**0.00**	**248,141.54**	**248,141.54**	**0.00**	**0.00**	**0.00**	**0.00**	**248,141.54**
650-Cap Proj/2021 Construction										
313384NA3	AGCY	FHLB	0.00	0.00	0.00	0.00	0.00	52,453.19	0.00	52,453.19
89233HYA6	CP	Toyota Motor Credit Corp	0.00	0.00	0.00	0.00	0.00	86,000.00	0.00	86,000.00
912797FT9	US GOVT	U.S. Treasury Bill	0.00	0.00	0.00	0.00	0.00	242,037.50	0.00	242,037.50
TEXPOOL	LGIP	TexPool	0.00	1,716,646.76	1,716,646.76	0.00	0.00	0.00	0.00	1,716,646.76
912797JM0	US GOVT	U.S. Treasury Bill	0.00	0.00	0.00	0.00	0.00	43,610.00	0.00	43,610.00
912797HT7	US GOVT	U.S. Treasury Bill	0.00	0.00	0.00	0.00	0.00	34,272.67	0.00	34,272.67
78009AFE9	CP	Royal Bank of Canada	0.00	0.00	0.00	0.00	0.00	358,416.67	0.00	358,416.67
89233GH58	CP	Toyota Motor Credit Corp	0.00	0.00	0.00	0.00	0.00	120,683.33	0.00	120,683.33
Total 650-Cap Proj/2021 Construction			**0.00**	**1,716,646.76**	**1,716,646.76**	**0.00**	**0.00**	**937,473.36**	**0.00**	**2,654,120.12**
755-Workers' Compensation Fund										
TEXPOOL	LGIP	TexPool	0.00	31,900.66	31,900.66	0.00	0.00	0.00	0.00	31,900.66
Total 755-Workers' Compensation Fund			**0.00**	**31,900.66**	**31,900.66**	**0.00**	**0.00**	**0.00**	**0.00**	**31,900.66**
Grand Total			**261,102.78**	**4,781,348.41**	**4,878,598.41**	**0.00**	**163,852.78**	**1,236,300.93**	**0.00**	**6,017,649.34**

Investment Transactions

CUSIP	Trade Date	Settle Date	Security Type	Security Description	Coupon	Maturity Date	Call Date	Par Value	Price	Principal Amount	Interest Purchased/ Received	Total Amount	Realized Gain/Loss	YTM	YTW
199-General Operating Fund															
Buy															
89233GH58	11/09/23	11/10/23	CP	Toyota Motor Credit Corp	0.000	08/05/24		10,000,000.00	95.838	9,583,797.22	0.00	9,583,797.22	0.00	5.812	5.812
Total Buy								**10,000,000.00**		**9,583,797.22**	**0.00**	**9,583,797.22**	**0.00**		
Coupon															
3135GAGS4	10/18/23	10/18/23	AGCY CALL	FNMA	5.000	04/18/24		0.00		0.00	125,000.00	125,000.00	0.00	--	--
Total Coupon								**0.00**		**0.00**	**125,000.00**	**125,000.00**	**0.00**		
Maturity															
912797HA8	10/10/23	10/10/23	US GOVT	U.S. Treasury Bill	0.000	10/10/23		(10,000,000.00)	100.000	10,000,000.00	0.00	10,000,000.00	0.00	--	--
89233HYA6	11/10/23	11/10/23	CP	Toyota Motor Credit Corp	0.000	11/10/23		(10,000,000.00)	100.000	10,000,000.00	0.00	10,000,000.00	0.00	--	--
Total Maturity								**(20,000,000.00)**		**20,000,000.00**	**0.00**	**20,000,000.00**	**0.00**		
240-Food Service Fund															
Maturity															
912797HA8	10/10/23	10/10/23	US GOVT	U.S. Treasury Bill	0.000	10/10/23		(3,000,000.00)	100.000	3,000,000.00	0.00	3,000,000.00	0.00	--	--
Total Maturity								**(3,000,000.00)**		**3,000,000.00**	**0.00**	**3,000,000.00**	**0.00**		
497-Permanent Local School Fund															
Buy															
89233GH58	11/09/23	11/10/23	CP	Toyota Motor Credit Corp	0.000	08/05/24		5,000,000.00	95.838	4,791,898.61	0.00	4,791,898.61	0.00	5.812	5.812
Total Buy								**5,000,000.00**		**4,791,898.61**	**0.00**	**4,791,898.61**	**0.00**		
Coupon															
3135GAGS4	10/18/23	10/18/23	AGCY CALL	FNMA	5.000	04/18/24		0.00		0.00	150,000.00	150,000.00	0.00	--	--
Total Coupon								**0.00**		**0.00**	**150,000.00**	**150,000.00**	**0.00**		
Maturity															
89233HYA6	11/10/23	11/10/23	CP	Toyota Motor Credit Corp	0.000	11/10/23		(5,000,000.00)	100.000	5,000,000.00	0.00	5,000,000.00	0.00	--	--

Investment Transactions

CUSIP	Trade Date	Settle Date	Security Type	Security Description	Coupon	Maturity Date	Call Date	Par Value	Price	Principal Amount	Interest Purchased/ Received	Total Amount	Realized Gain/Loss	YTM	YTW
Total Maturity								**(5,000,000.00)**		**5,000,000.00**	**0.00**	**5,000,000.00**	**0.00**		
650-Cap Proj/2021 Construction															
Buy															
89233GH58	11/09/23	11/10/23	CP	Toyota Motor Credit Corp	0.000	08/05/24		15,000,000.00	95.838	14,375,695.83	0.00	14,375,695.83	0.00	5.812	5.812
912797HT7	12/07/23	12/08/23	US GOVT	U.S. Treasury Bill	0.000	06/06/24		10,000,000.00	97.415	9,741,526.97	0.00	9,741,526.97	0.00	5.365	5.365
912797JM0	12/07/23	12/12/23	US GOVT	U.S. Treasury Bill	0.000	04/09/24		15,000,000.00	98.270	14,740,520.50	0.00	14,740,520.50	0.00	5.414	5.414
Total Buy								**40,000,000.00**		**38,857,743.30**	**0.00**	**38,857,743.30**	**0.00**		
Maturity															
313384NA3	10/16/23	10/16/23	AGCY	FHLB	0.000	10/16/23		(25,000,000.00)	100.000	25,000,000.00	0.00	25,000,000.00	0.00	--	--
89233HYA6	11/10/23	11/10/23	CP	Toyota Motor Credit Corp	0.000	11/10/23		(15,000,000.00)	100.000	15,000,000.00	0.00	15,000,000.00	0.00	--	--
912797FT9	12/07/23	12/07/23	US GOVT	U.S. Treasury Bill	0.000	12/07/23		(25,000,000.00)	100.000	25,000,000.00	0.00	25,000,000.00	0.00	--	--
Total Maturity								**(65,000,000.00)**		**65,000,000.00**	**0.00**	**65,000,000.00**	**0.00**		

Investment Transactions Totals

Transaction Type	Quantity	Principal Amount	Interest	Total Amount	Realized G/L	YTM	YTW
Total Buy	55,000,000.00	(53,233,439.13)	0.00	(53,233,439.13)	0.00	5.620	5.620
Total Maturity	(93,000,000.00)	93,000,000.00	0.00	93,000,000.00	0.00	5.284	5.284
Total Coupon	0.00	0.00	*275,000.00*	275,000.00	*0.00*		

Amortization and Accretion

CUSIP	Settle Date	Security Type	Security Description	Purchase Qty	Orig Price	Original Cost	Amort/Accr for Period	Total Amort/Accr Since Purch	Remaining Disc/ Premium	Ending Book Value
199-General Operating Fund										
912797HA8	06/13/23	US GOVT	U.S. Treasury Bill	0.00	0.000	0.00	13,103.75	0.00	0.00	0.00
89233HYA6	05/16/23	CP	Toyota Motor Credit Corp	0.00	0.000	0.00	57,333.33	0.00	0.00	0.00
3135GAGS4	04/18/23	AGCY CALL	FNMA	5,000,000.00	100.000	5,000,000.00	0.00	0.00	0.00	5,000,000.00
89233GH58	11/10/23	CP	Toyota Motor Credit Corp	10,000,000.00	95.838	9,583,797.22	80,455.56	80,455.56	(335,747.22)	9,664,252.78
Total 199-General Operating Fund				**15,000,000.00**		**14,583,797.22**	**150,892.64**	**80,455.56**	**(335,747.22)**	**14,664,252.78**
240-Food Service Fund										
912797HA8	06/13/23	US GOVT	U.S. Treasury Bill	0.00	0.000	0.00	3,931.13	0.00	0.00	0.00
Total 240-Food Service Fund				**0.00**		**0.00**	**3,931.13**	**0.00**	**0.00**	**0.00**
497-Permanent Local School Fund										
89233HYA6	05/16/23	CP	Toyota Motor Credit Corp	0.00	0.000	0.00	28,666.67	0.00	0.00	0.00
3135GAGS4	04/18/23	AGCY CALL	FNMA	6,000,000.00	100.000	6,000,000.00	0.00	0.00	0.00	6,000,000.00
89233GH58	11/10/23	CP	Toyota Motor Credit Corp	5,000,000.00	95.838	4,791,898.61	40,227.78	40,227.78	(167,873.61)	4,832,126.39
3130AQV26	03/31/23	AGCY CALL	FHLB	10,000,000.00	95.756	9,575,600.00	75,109.36	220,871.09	(203,528.91)	9,796,471.09
Total 497-Permanent Local School Fund				**21,000,000.00**		**20,367,498.61**	**144,003.81**	**261,098.86**	**(371,402.53)**	**20,628,597.47**
650-Cap Proj/2021 Construction										
313384NA3	05/01/23	AGCY	FHLB	0.00	0.000	0.00	52,453.19	0.00	0.00	0.00
89233HYA6	05/16/23	CP	Toyota Motor Credit Corp	0.00	0.000	0.00	86,000.00	0.00	0.00	0.00
912797FT9	06/08/23	US GOVT	U.S. Treasury Bill	0.00	0.000	0.00	242,037.50	0.00	0.00	0.00
912797JM0	12/12/23	US GOVT	U.S. Treasury Bill	15,000,000.00	98.270	14,740,520.50	43,610.00	43,610.00	(215,869.50)	14,784,130.50
912797HT7	12/08/23	US GOVT	U.S. Treasury Bill	10,000,000.00	97.415	9,741,526.97	34,272.67	34,272.67	(224,200.36)	9,775,799.64
78009AFE9	09/25/23	CP	Royal Bank of Canada	25,000,000.00	95.902	23,975,395.83	358,416.67	381,791.67	(642,812.50)	24,357,187.50
89233GH58	11/10/23	CP	Toyota Motor Credit Corp	15,000,000.00	95.838	14,375,695.83	120,683.33	120,683.33	(503,620.84)	14,496,379.16

Amortization and Accretion

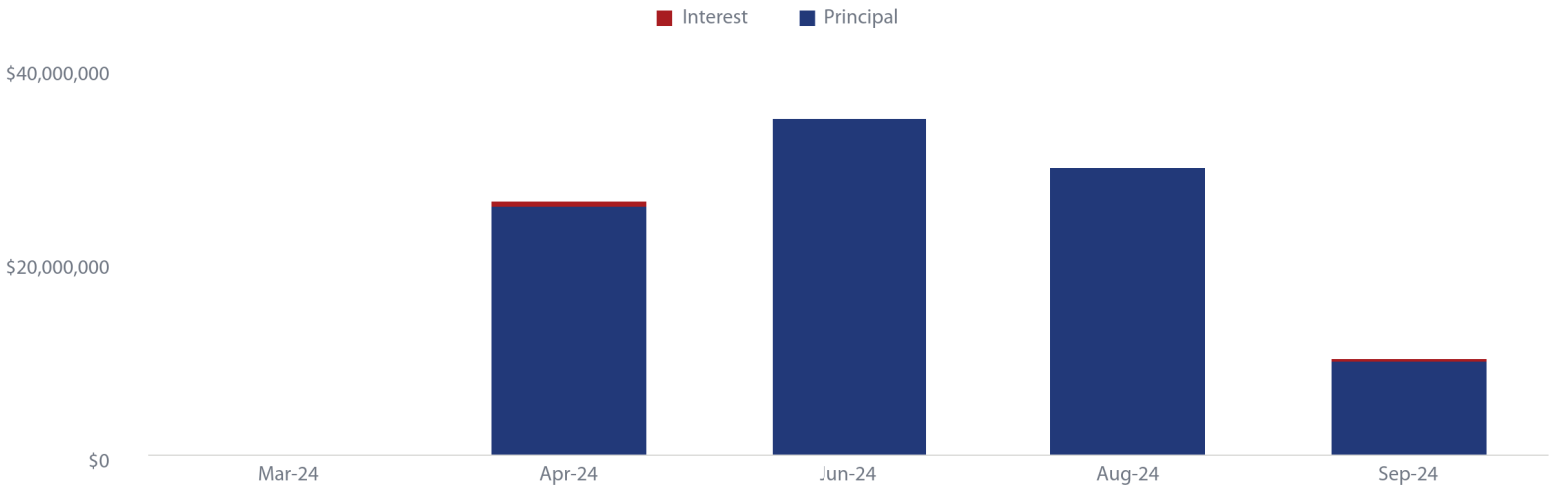
CUSIP	Settle Date	Security Type	Security Description	Purchase Qty	Orig Price	Original Cost	Amort/Accr for Period	Total Amort/Accr Since Purch	Remaining Disc/ Premium	Ending Book Value
Total 650-Cap Proj/2021 Construction				65,000,000.00		62,833,139.13	937,473.36	580,357.67	(1,586,503.20)	63,413,496.80
Grand Total				101,000,000.00		97,784,434.96	1,236,300.93	921,912.09	(2,293,652.95)	98,706,347.05

Projected Cash Flows

CUSIP	Security Description	Post Date	Interest	Principal	Total Amount
199-General Operating Fund					
3135GAGS4	FNMA	04/18/24	125,000.00		125,000.00
3135GAGS4	FNMA	04/18/24		5,000,000.00	5,000,000.00
89233GH58	Toyota Motor Credit Corp	08/05/24		10,000,000.00	10,000,000.00
497-Permanent Local School Fund					
3130AQV26	FHLB	03/04/24	80,500.00		80,500.00
3135GAGS4	FNMA	04/18/24	150,000.00		150,000.00
3135GAGS4	FNMA	04/18/24		6,000,000.00	6,000,000.00
89233GH58	Toyota Motor Credit Corp	08/05/24		5,000,000.00	5,000,000.00
3130AQV26	FHLB	09/04/24	80,500.00		80,500.00
3130AQV26	FHLB	09/04/24		10,000,000.00	10,000,000.00
650-Cap Proj/2021 Construction					
912797JM0	U.S. Treasury Bill	04/09/24		15,000,000.00	15,000,000.00
912797HT7	U.S. Treasury Bill	06/06/24		10,000,000.00	10,000,000.00
78009AFE9	Royal Bank of Canada	06/14/24		25,000,000.00	25,000,000.00
89233GH58	Toyota Motor Credit Corp	08/05/24		15,000,000.00	15,000,000.00
Grand Total			**436,000.00**	**101,000,000.00**	**101,436,000.00**

Projected Cash Flows Totals

Month and Year	Interest	Principal	Total Amount
March 2024	80,500.00		80,500.00
April 2024	275,000.00	26,000,000.00	26,275,000.00
June 2024		35,000,000.00	35,000,000.00
August 2024		30,000,000.00	30,000,000.00
September 2024	80,500.00	10,000,000.00	10,080,500.00
Total	**436,000.00**	**101,000,000.00**	**101,436,000.00**



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Signature: LeAngiela Drake
LeAngiela Drake (Feb 7, 2024 09:02 CST)

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Richardson ISD 12-31-23 Qtrly

Final Audit Report 2024-02-07

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BOARD OF TRUSTEES
RICHARDSON INDEPENDENT SCHOOL DISTRICT
RICHARDSON, TEXAS

Date: February 22, 2024
Submitted by: Dr. Matthew Gibbins, Assistant Superintendent- Administrative Services; Leticia D. McGowan, General Counsel

ACTION ITEM

TOPIC: Amendment to Policy FEC (LOCAL) – Attendance: Attendance for Credit

BACKGROUND INFORMATION:

Staff regularly review local policies to ensure they conform to District needs, applicable law, and best practices. The recommendation is to amend FEC (LOCAL) – Attendance: Attendance for Credit. The recommended revisions are to incorporate legislative updates. As reflected in the revision at Absences Considered, in calculating whether a student has met the 90 percent attendance requirement, HB 699 (2021 legislative session) creates an exception for absences resulting from a serious or life-threatening illness or related treatment. Administrative details on documentation of student illnesses have been included in the *Model Student Handbook* and are recommended for deletion. Provisions on the attendance committee's consideration of the best interest of the student, extenuating circumstances, and conditions for awarding credit or a final grade have been revised and reordered to emphasize a student's mastery of the essential knowledge and skills and maintaining a passing grade rather than assigning a student to attend programs for an amount of time equivalent to the student's absences. The district's locally developed text identifying driver's license tests on the list of non-extenuating circumstances is recommended for deletion based on SB 289 (2021 legislative session), which creates an optional excused absence to obtain a learning permit or driver's license. Provisions to address the district's DOI exemption have been reordered for clarity and consistency with policy style.

The following policy is provided for the Board's review:

a. FEC (LOCAL) – Attendance: Attendance for Credit

SUPERINTENDENT'S RECOMMENDATION:

The Superintendent recommends that the Board approve the proposed revision to Policy FEC (LOCAL).

PROPOSED RESOLUTION

WHEREAS, the Board of Trustees regularly reviews and updates its policies to ensure they conform to applicable law, best practices, and the Board's mission, beliefs, and strategic objectives; and

WHEREAS, the Board has reviewed the proposed revision to Policy FEC (LOCAL) as presented by staff, and finds that the proposed revision to Policy FEC (LOCAL) are appropriate and necessary to ensure that the District's policy conforms to applicable law, best practices, and the Board's mission, beliefs, and strategic objectives;

THEREFORE, BE IT RESOLVED, that the Board of Trustees of the Richardson Independent School District adopts and approves the proposed revision to Policy FEC (LOCAL).

Note: This local policy has been revised in accordance with the District's innovation plan.[1]

This policy shall apply to a student who has not been in attendance for 90 percent of the days the class is offered.

Absences Considered

Except as otherwise provided by law, all absences incurred while enrolled in the District shall be considered in determining whether a student has attended the required percentage of days under this policy.

Exception

In accordance with the District's innovation plan, the District shall be exempt from portions of the state law regarding student minimum attendance to earn credit or a final grade. Absences related to District-approved, college-based dual credit courses, other innovative learning opportunities, participation in the Memorial Park Academy Program, or other nontraditional education programs offered by the District to all students to complete high school early or make up missed coursework to qualify for graduation shall not be considered in determining whether a student has attended the required percentage of days under this policy.

The Board shall establish an attendance committee or as many committees as necessary for efficient implementation of Education Code 25.092.

The Superintendent shall make the specific appointments in accordance with legal requirements.

Written Excuse

A written excuse stating the reason for the absence, and signed by the parent, guardian, or person standing in parental relation to the student, shall be required for all absences. Periodic checks on students absent may be made by phone; chronic absentees shall be referred to the coordinator of student services. [See also FEB]

Truancy

Students absent from school without permission of the parent or guardian, or absent from class without the principal's permission, shall be considered truant and shall be subject to disciplinary action

Parental Notice of Excessive Absences

A student and the student's parent or guardian shall be given written notice prior to and at such time when a student's attendance in any class drops below 90 percent of the days the class is offered.

Methods for Regaining Credit or Awarding a Final Grade

When a student's attendance drops below 90 percent but remains at least at 75 percent of the days the class is offered, the student may earn credit for the class or a final grade by completing a plan approved by the principal. This plan must provide for the student to

meet the instructional requirements of the class as determined by the principal.

If the student fails to successfully complete the plan, or when a student's attendance drops below 75 percent of the days the class is offered, the student, parent, or representative may request award of credit or a final grade by submitting a written petition to the appropriate attendance committee.

Petitions for credit or a final grade may be filed at any time the student receives notice but, in any event, no later than 30 days after the last day of classes.

The attendance committee shall review the student's entire attendance record and the reasons for absences and shall determine whether to award credit or a final grade. The attendance committee may also, whether a petition is filed or not, review the records of all students whose attendance drops below 90 percent of the days the class is offered.

A student who has lost credit or has not received a final grade because of excessive absences may regain credit or be awarded a final grade by fulfilling the requirements established by the attendance committee.

Personal Illness

The principal or attendance committee may require verification from a health-care provider in accordance with administrative regulations as a condition of classifying an absence for personal illness as one for which there are extenuating circumstances.

Best Interest Standard

In reaching consensus regarding a student's absences and how the student can be awarded credit or a final grade, the attendance committee shall attempt to ensure that its decision is in the best interest of the student. The Superintendent shall develop administrative regulations to document the attendance committee's decision.

Guidelines on Extenuating Circumstances

The attendance committee shall consider whether a student has mastered the essential knowledge and skills and maintained passing grades in the course or subject.

1. When makeup work is completed satisfactorily, the attendance committee shall consider extracurricular absences and other excused absences as days of attendance for award of credit or a final grade. [See FEA]
2. The attendance committee shall consider whether the reasons for the absences were out of the parent's or student's

control and whether documentation for the absence is acceptable.

3. The student or parent shall be given an opportunity to present any information to the committee about the absences and to discuss ways to earn or regain credit or be awarded a final grade.

Non-Extenuating Circumstances

The Attendance Appeal Committee shall consider non-extenuating circumstances when reviewing absences, which shall include, but are not limited to, the following:

1. Truancy.
2. Personal or family vacation (i.e., skiing, hunting, fishing, or other pleasure trips); business trips; nonschool related trips, classes, or activities; work activities other than District-approved work programs; and private lessons. [See FEF]
3. Personal business.
4. Job interviews, college visitations, and educational trips not approved by the school.
5. Off-campus instruction activities that cause the student to miss other classes (excluding approved extracurricular activities). [See FM]
6. Baby-sitting siblings.

The attendance committee shall consider the student's unique circumstances and, if necessary, shall impose conditions for awarding credit or a final grade that permit the student to meet the instructional requirements of the class rather than assigning a student to attend a specified program for an amount of time equivalent to the student's absences. Conditions may include:

1. Maintaining attendance standards for the rest of the semester.
2. Completing additional assignments, as specified by the committee or teacher.
3. Attending tutorial sessions as scheduled.
4. Completing other instructional programs, as specified by the committee.
5. Taking an examination to earn credit. [See EHDB]

In all cases, the student must earn a passing grade in order to receive credit.

Appeal Process A parent or student may appeal the decision of the attendance committee in accordance with FNG(LOCAL).

[1] Innovation Plan: https://web.risd.org/home/about/

BOARD OF TRUSTEES
RICHARDSON INDEPENDENT SCHOOL DISTRICT
RICHARDSON, TEXAS

Date: February 22, 2024
Submitted by: Dr. Matthew Gibbins, Assistant Superintendent- Administrative Services; Leticia D. McGowan, General Counsel

ACTION ITEM

TOPIC: Amendment to Policy EI (LOCAL) – Academic Achievement

BACKGROUND INFORMATION:

Staff regularly review local policies to ensure they conform to District needs, applicable law, and best practices. The recommendation is to amend EI (LOCAL) – Academic Achievement. The recommended policy text incorporates the optional Administrative Code rule that permits districts, in accordance with local district policy, to award course credit proportionately to a student who successfully completes only half of a course. A new board policy provision has been recommended to address this option, which matches common practice.

The following policy is provided for the Board's review:

EI (LOCAL) – Academic Achievement

SUPERINTENDENT'S RECOMMENDATION:

The Superintendent recommends that the Board approve the proposed revision to Policy EI (LOCAL).

PROPOSED RESOLUTION

WHEREAS, the Board of Trustees regularly reviews and updates its policies to ensure they conform to applicable law, best practices, and the Board's mission, beliefs, and strategic objectives; and

WHEREAS, the Board has reviewed the proposed revision to Policy EI (LOCAL) as presented by staff, and finds that the proposed revision to Policy EI (LOCAL) are appropriate and necessary to ensure that the District's policy conforms to applicable law, best practices, and the Board's mission, beliefs, and strategic objectives;

THEREFORE, BE IT RESOLVED, that the Board of Trustees of the Richardson Independent School District adopts and approves the proposed revision to Policy EI (LOCAL).

Certificate of Coursework Completion

The District shall issue a certificate of coursework completion to a student who has successfully completed state and local credit requirements for graduation but has failed to meet all applicable state testing requirements. The certificate of coursework completion shall reflect the date on which all coursework was completed. The student shall be allowed to participate in the graduation ceremonies, but shall not receive a diploma unless all state testing requirements have been successfully completed. [See EIF for graduation requirements and FMH for provisions on commencement exercises.]

A student who participates in the Memorial Park Academy Program or other nontraditional education program offered by the District to all students to complete high school early or make up missed coursework to qualify for graduation shall not be required to attend school once all coursework required for graduation has been completed. [See FEC]

Partial Credit

When a student earns a passing grade in only half of a course and the combined grade for both halves is lower than 70, the District shall award the student credit for the half with the passing grade.

BOARD OF TRUSTEES
RICHARDSON INDEPENDENT SCHOOL DISTRICT
RICHARDSON, TEXAS

Date: February 22, 2024
Submitted by: Dr. Matthew Gibbins, Assistant Superintendent- Administrative Services; Leticia D. McGowan, General Counsel

ACTION ITEM

TOPIC: Amendment to Policy EIE (LOCAL) – Academic Achievement: Retention and Promotion

BACKGROUND INFORMATION:

Staff regularly review local policies to ensure they conform to District needs, applicable law, and best practices. The recommendation is to amend EIE (LOCAL) – Academic Achievement: Retention and Promotion. The recommended policy text removes outdated provisions on grade advancement testing, including provisions on assignment of retained students, which were based on Administrative Code provisions addressing grade advancement requirements. The statement about eliminating the practice of retaining students is recommended for deletion, as it is only needed if a district operates an optional extended year program (OEYP) under Education Code 29.082. Accelerated instruction is now addressed at EHBC. The following policy is provided for the Board's review:

EIE (LOCAL) – Academic Achievement: Retention and Promotion

SUPERINTENDENT'S RECOMMENDATION:

The Superintendent recommends that the Board approve the proposed revision to Policy EIE (LOCAL).

PROPOSED RESOLUTION

WHEREAS, the Board of Trustees regularly reviews and updates its policies to ensure they conform to applicable law, best practices, and the Board's mission, beliefs, and strategic objectives; and

WHEREAS, the Board has reviewed the proposed revision to Policy EIE (LOCAL) as presented by staff, and finds that the proposed revision to Policy EIE (LOCAL) are appropriate and necessary to ensure that the District's policy conforms to applicable law, best practices, and the Board's mission, beliefs, and strategic objectives;

THEREFORE, BE IT RESOLVED, that the Board of Trustees of the Richardson Independent School District adopts and approves the proposed revision to Policy EIE (LOCAL).

Promotion and course credit shall be based on mastery of the curriculum. Expectations and standards for promotion shall be established for each grade level, content area, and course and shall be coordinated with compensatory, intensive, and/or accelerated services. [See EHBC] The District shall comply with applicable state and federal requirements when determining methods for students with disabilities [see FB] or students who are English language learners [see EHBE and EKBA] to demonstrate mastery of the curriculum.

Students Receiving Special Education Services

Any modified promotion standards for a student receiving special education services shall be determined by the student's admission, review, and dismissal (ARD) committee and documented in the student's individualized education program (IEP). [See EHBA series and EKB]

Standards for Mastery

In addition to the factors in law that must be considered for promotion, mastery shall be determined as follows:

1. Course assignments and unit evaluation shall be used to determine student grades in a subject. An average of 70 or higher shall be considered a passing grade.

2. Mastery of the skills necessary for success at the next level shall be validated by assessments that may either be incorporated into unit or final exams or may be administered separately. Mastery of at least 70 percent of the objectives shall be required.

Grades 1–2

In grades 1–2, promotion to the next grade level shall be based on 70 percent mastery of formal and informal assessments of the course-level, grade-level standards (essential knowledge and skills).

Grades 3–5

3. In grades 3–5, promotion to the next grade level shall be based on an overall average of 70 on a scale of 100 based on course-level, grade-level standards (essential knowledge and skills) for all subject areas and a grade of 70 or above in language arts, mathematics, science, and social studies.

Grades 6–8

4. In grades 6–8, promotion to the next grade level shall be based on an overall average of 70 on a scale of 100 based on course-level, grade-level standards (essential knowledge and skills) for all subject areas and a grade of 70 or above in language arts, mathematics, science, and social studies.

Grades 9–12

Grade-level advancement for students in grades 9–12 shall be earned by course credits. [See EI]

BOARD OF TRUSTEES
RICHARDSON INDEPENDENT SCHOOL DISTRICT
RICHARDSON, TEXAS

Date: February 22, 2024
Submitted by: Dr. Matthew Gibbins, Assistant Superintendent- Administrative Services; Leticia D. McGowan, General Counsel

ACTION ITEM

TOPIC: Addition of Policy EHB(LOCAL) – Curriculum Design: Special Programs

BACKGROUND INFORMATION:

Staff regularly review local policies to ensure they conform to District needs, applicable law, and best practices. The recommendation is to add EHB(LOCAL) – Curriculum Design: Special Programs. The recommended policy is to address TEA policy requirements for the ongoing TEA special education cyclical monitoring reviews and providing regular training opportunities for teachers of students with dyslexia.

The following policy is provided for the Board's review:

EHB(LOCAL) – Curriculum Design: Special Programs

SUPERINTENDENT'S RECOMMENDATION:

The Superintendent recommends that the Board approve the proposed revision to Policy EHB (LOCAL).

PROPOSED RESOLUTION

WHEREAS, the Board of Trustees regularly reviews and updates its policies to ensure they conform to applicable law, best practices, and the Board's mission, beliefs, and strategic objectives; and

WHEREAS, the Board has reviewed the proposed revision to Policy EHB (LOCAL) as presented by staff, and finds that the proposed revision to Policy EHB (LOCAL) are appropriate and necessary to ensure that the District's policy conforms to applicable law, best practices, and the Board's mission, beliefs, and strategic objectives;

THEREFORE, BE IT RESOLVED, that the Board of Trustees of the Richardson Independent School District adopts and approves the proposed revision to Policy EHB (LOCAL).

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

BOARD OF TRUSTEES
RICHARDSON INDEPENDENT SCHOOL DISTRICT
RICHARDSON, TEXAS

Date: February 22, 2024
Submitted by: Dr. Matthew Gibbins, Assistant Superintendent- Administrative Services; Leticia D. McGowan, General Counsel

ACTION ITEM

TOPIC: Addition of Policy EHBAA (LOCAL) – Special Education: Identification, Evaluation and Eligibility

BACKGROUND INFORMATION:

Staff regularly review local policies to ensure they conform to District needs, applicable law, and best practices. The recommendation is to add EHBAA (LOCAL) – Special Education: Identification, Evaluation and Eligibility. The recommended policy is to address TEA policy requirements for the ongoing TEA special education cyclical monitoring reviews and requiring the district to ensure that a student who is transitioning from early childhood intervention (ECI) has an individualized education program (IEP) developed and implemented by the child's third birthday.

The following policy is provided for the Board's review:

EHBAA (LOCAL) – Special Education: Identification, Evaluation and Eligibility

SUPERINTENDENT'S RECOMMENDATION:

The Superintendent recommends that the Board approve the proposed revision to Policy EHBAA (LOCAL).

PROPOSED RESOLUTION

WHEREAS, the Board of Trustees regularly reviews and updates its policies to ensure they conform to applicable law, best practices, and the Board's mission, beliefs, and strategic objectives; and

WHEREAS, the Board has reviewed the proposed revision to Policy EHBAA (LOCAL) as presented by staff, and finds that the proposed revision to Policy EHBAA (LOCAL) are appropriate and necessary to ensure that the District's policy conforms to applicable law, best practices, and the Board's mission, beliefs, and strategic objectives;

THEREFORE, BE IT RESOLVED, that the Board of Trustees of the Richardson Independent School District adopts and approves the proposed revision to Policy EHBAA (LOCAL).

When a student transitions from early childhood intervention (ECI) to early childhood special education (ECSE) services, the District shall develop and implement an individualized education program (IEP) by the child's third birthday.

BOARD OF TRUSTEES
RICHARDSON INDEPENDENT SCHOOL DISTRICT
RICHARDSON, TEXAS

Date: February 22, 2024
Submitted by: Dr. Matthew Gibbins, Assistant Superintendent- Administrative Services; Leticia D. McGowan, General Counsel

ACTION ITEM

TOPIC: Revision to Policy FNG(LOCAL) – Student Rights and Responsibilities: Student and Parent Complaints/Grievances

BACKGROUND INFORMATION:

Staff regularly review local policies to ensure they conform to District needs, applicable law, and best practices. The recommendation is to revise FNG(LOCAL) – Student Rights and Responsibilities: Student and Parent Complaints/Grievances. The recommended revisions to the policy are to address numerous items. First, the list of protected characteristics at "Other Complaint Processes" is to align with the revised list made to FFH(LOCAL). A recommended revision specifies that a person filing a complaint regarding refusal of entry to or ejection from property based on Education Code 37.105 shall be permitted to address the board within 90 "calendar" days. Recommended changes at "Other Complaint Processes" are to:

- Clarify how special education complaints are addressed;
- Encompass all instructional resources policies; and
- Reference the required hearing procedure for eligibility disputes under school nutrition programs.

Administration has additional revisions including providing a definition of Grievance Coordinator, clarifying that deadlines are by business days rather than calendar days, altering some timelines based on the use of business days, changing the flow of the information, clearly identifying the informal mediation process and other changes to address process concerns that have been raised in the last year.

The following policy is provided for the Board's review:

FNG(LOCAL) – Student Rights and Responsibilities: Student and Parent Complaints/Grievances

SUPERINTENDENT'S RECOMMENDATION:

The Superintendent recommends that the Board approve the proposed revision to Policy FNG(LOCAL) – Student Rights and Responsibilities: Student and Parent Complaints/Grievances.

PROPOSED RESOLUTION

WHEREAS, the Board of Trustees regularly reviews and updates its policies to ensure they conform to applicable law, best practices, and the Board's mission, beliefs, and strategic objectives; and

WHEREAS, the Board has reviewed the proposed revision to Policy FNG (LOCAL) as presented by staff, and finds that the proposed revision to Policy FNG (LOCAL) are appropriate and necessary to ensure that the District's policy conforms to applicable law, best practices, and the Board's mission, beliefs, and strategic objectives;

THEREFORE, BE IT RESOLVED, that the Board of Trustees of the Richardson Independent School District adopts and approves the proposed revision to Policy FNG (LOCAL).

Complaints

In this policy, the terms “complaint” and “grievance” shall have the same meaning.

Other Complaint Processes

Student or parent complaints shall be filed in accordance with this policy, except as required by the policies listed below. Some of these policies require appeals to be submitted in accordance with FNG after the relevant complaint process:

1. Complaints alleging discrimination or harassment based on race, color, religion, sex, gender, national origin, age, or disability~~, or religion~~ shall be submitted in accordance with FFH.
2. Complaints concerning dating violence shall be submitted in accordance with FFH.
3. Complaints concerning retaliation related to discrimination and harassment shall be submitted in accordance with FFH.
4. Complaints concerning bullying or retaliation related to bullying shall be submitted in accordance with FFI.
5. Complaints concerning failure to award credit or a final grade on the basis of attendance shall be submitted in accordance with FEC.
6. Complaints concerning removal to a DAEP and expulsion shall be submitted in accordance with FOD and the Student Code of Conduct.
7. Complaints concerning any final decisions of the gifted and talented selection committee regarding selection for or exit from the gifted program shall be submitted in accordance with EHBB.
8. Complaints within the scope of Section 504, including complaints concerning identification, evaluation, or educational placement of a student with a disability, ~~within the scope of Section 504~~ shall be submitted in accordance with FB and the procedural safeguards handbook.
9. Complaints within the scope of the Individuals with Disabilities Education Act, including complaints concerning identification, evaluation, educational placement, or discipline of a student with a disability, ~~within the scope of the Individuals with Disabilities Education Act~~ shall be submitted in accordance with EHBAE, FOF, and the procedural safeguards handbook provided to parents of all students referred to special education.
10. Complaints concerning instructional resources shall be submitted in accordance with the EF series.

11. Complaints concerning a commissioned peace officer who is an employee of the District shall be submitted in accordance with CKE.

12. Complaints concerning intradistrict transfers or campus assignment shall be submitted in accordance with FDB.

13. Complaints concerning admission, placement, or services provided for a homeless student shall be submitted in accordance with FDC.

14. Complaints concerning disputes regarding a student's eligibility for free or reduced-priced meal programs shall be submitted in accordance with COB.

Complaints regarding refusal of entry to or ejection from District property based on Education Code 37.105 shall be filed in accordance with this policy. However, the timelines shall be adjusted as necessary to permit the complainant to address the Board in person within 90 calendar days of filing the initial complaint, unless the complaint is resolved before the Board considers it. [See GKA(LEGAL)]

Notice to Students and Parents

The District shall inform students and parents of this policy through appropriate District publications.

Guiding Principles

Informal Process

The Board encourages students and parents to discuss their concerns with the appropriate teacher, principal, or other campus administrator who has the authority to address the concerns. Concerns should be expressed as soon as possible to allow early resolution at the lowest possible administrative level.

Informal resolution shall be encouraged but shall not extend any deadlines in this policy, except by mutual written consent.

Formal Process

A student or parent may initiate the formal process described below by timely filing a written complaint form.

Even after initiating the more formal complaint process, students and parents are encouraged to seek informal resolution of their concerns. A student or parent whose concerns are resolved may withdraw a formal complaint at any time.

The process described in this policy shall not be construed to create new or additional rights beyond those granted by law or Board policy, nor to require a full evidentiary hearing or "mini-trial" at any level.

Freedom from Retaliation

Neither the Board nor any District employee shall unlawfully retaliate against any student or parent for bringing a concern or complaint.

General Provisions

The Board encourages students and parents to discuss their concerns and complaints through informal conferences with the appropriate teacher, principal, or other administrator who has the authority to address the concerns. Concerns should be expressed as soon as possible to allow early resolution at the lowest possible administrative level. Informal resolution shall be encouraged but shall **not** extend any filing deadlines in this policy. The burden of proof for the hearing is on the student or parent filing the complaint.

If the only administrator who has authority to remedy the alleged problem is the Superintendent or designee, the complaint may, at the District's discretion, begin at Level Two following the procedure, including deadlines, for filing the Level One complaint form.

If the complaint is not filed with the appropriate administrator, the receiving administrator must note the date and time the complaint form was received and immediately forward the complaint form to the appropriate administrator.

Unless there is mutual consent, Level One and Level Two hearings are not recorded. If a recording is made, recordings ~~Recordings~~ of the Level One and Level Two hearings ~~conferences~~, if any, shall be maintained with the Level One and Level Two records.

Direct Communication with Board Members

The Grievant, as defined further in this policy, shall not be prohibited from communicating with a member of the Board regarding District operations except when communication between the Grievant and a Board member would be inappropriate because of a pending hearing or appeal related to the Grievant's pending grievance.

Filing

Complaint forms and appeal notices may be filed by hand-delivery, by electronic communication, including email and fax, or by U.S. Mail. Filings shall be deemed timely filed if:

1. For hand-delivered filings, if received at the Administration Building front desk by the close of business (4:30 p.m. unless otherwise indicated in writing) on the deadline date;
2. For filings submitted by electronic communication, if they are received at Grievances@risd.org by the close of business (4:30 p.m. unless otherwise indicated in writing) on the deadline date, as indicated by the date/time shown on the electronic communication;

3. For mail filings, if postmarked by the U.S. Postal Service on or before the deadline date and received by the appropriate administrator or the Grievance Coordinator no more than three business days after the deadline.

~~Hand-delivered filings shall be timely filed if received by the appropriate administrator or designee by the close of business (4:30 p.m.) on the deadline. Filings submitted by electronic communication shall be timely filed if they are received by the close of business (4:30 p.m.) on the deadline, as indicated by the date/time shown on the electronic communication. Mail filings shall be timely filed if they are postmarked by U.S. Mail on or before the deadline and received by the appropriate administrator or designated representative no more than three days after the deadline.~~

Scheduling Hearings ~~Conferences~~

The District shall make reasonable attempts to schedule hearings ~~conferences~~ at a mutually agreeable time. If a Grievant ~~student or parent~~ fails to appear at a scheduled hearing ~~conference~~, the District may hold the hearing ~~conference~~ and issue a decision in the Grievant's ~~student's or parent's~~ absence.

Decision ~~Response~~

At Levels One and Two, "decision" ~~"response"~~ shall mean a written communication to the Grievant ~~student or parent~~ from the appropriate administrator. ~~Responses~~ Decisions may be hand-delivered, sent by electronic communication to the Grievant's ~~student's or parent's~~ email address of record, or sent by U.S. Mail to the Grievant's ~~student's or parent's~~ mailing address of record. Mailed decisions ~~responses~~ shall be timely if they are postmarked by U.S. Mail on or before the deadline.

Days

"Days" shall mean District business ~~calendar~~ days. In calculating timelines under this policy, the day a document is filed is "day zero," and all deadlines shall be determined by counting the following business day as "day one." A District business day does not include a school holiday or a day on which District administrative offices are closed for business. If a deadline falls on a school holiday or other day on which District administrative offices are closed for business, ~~then~~ the deadline shall be extended to the first business day following the holiday or closure."

Grievant

"Grievant" is defined as the parent or student bringing forth the complaint. The Grievant may have, but is not required to have, a representative as the term is defined below. For purpose of this policy, references to "Grievant" shall also include the Grievant's representative.

Grievance Coordinator	The "Grievance Coordinator" is the designated District employee who serves as the point of contact for receipt of grievance complaints. The Grievance Coordinator is responsible for coordinating and scheduling hearings and communicating with the parties, unless otherwise noted in this policy.
Representative	"Representative" shall mean any person ~~who~~ or organization ~~that is~~ designated by the Grievant ~~student or parent~~ to represent the Grievant ~~student or parent~~ in the complaint process. A student may be represented by an adult at any level of the complaint. The Grievant ~~student or parent~~ may designate a representative through written notice to the District at any level of this process. The representative may participate in person, by telephone conference call or virtually. If the student or parent designates a representative with fewer than three days' notice to the District before a scheduled ~~conference or~~ hearing, the District may reschedule the ~~conference or~~ hearing to a later date, if desired, in order to include the District's legal counsel. The District may be represented by legal counsel at any level of the process.
Consolidating Complaints	Complaints arising out of an event or a series of related events shall be addressed in one complaint. A Grievant ~~student or parent~~ shall not file separate or serial complaints arising from any event or series of events that have been or could have been addressed in a previous complaint.
Untimely Filing~~s~~ of Complaint	All time limits for filing shall be strictly followed ~~unless modified by mutual written consent~~. If a complaint form or appeal notice is not timely filed, the complaint may be dismissed, on written notice to the Grievant ~~student or parent~~, at any point during the complaint process. The Grievant ~~student or parent~~ may appeal the dismissal due to untimeliness by seeking review in writing within seven business days from the date of the written dismissal notice was sent. ~~, starting at the level at which the complaint was dismissed. Such appeal shall be limited to the issue of timeliness.~~ The review will begin at the level at which the complaint was dismissed and shall be limited to the issue of timeliness.
Costs Incurred	Each party shall pay its own costs incurred in the course of the complaint.
Complaint and Appeal Forms	Complaints and appeals under this policy shall be submitted in writing on a form provided by the District. The following will govern the submission of complaint and appeal forms:

1. ~~Copies~~ A copy of any documents that support the complaint should be attached to the complaint form.
2. If the Grievant ~~student or parent~~ does not have a copy ~~copies~~ of ~~these~~ the supporting documents when filing the initial Level One complaint, ~~copies~~ a copy of the supporting documentation may be presented at the Level One hearing ~~conference~~.
3. After the Level One hearing ~~conference~~, no new documents may be submitted by the Grievant ~~student or parent~~ unless the Grievant ~~student or parent~~ did not know the documents existed before the Level One ~~conference or the~~ hearing officer allows the introduction of the documents.

Amendment of Complaint

A complaint or appeal form that is incomplete in any material aspect may be dismissed but may be refiled with all the required information if the refiling is within the designated time for filing. An amendment does **not** restart the timeline for submission.

Level One

Complaint forms must be filed:

1. Within ten business~~15~~ days of the date the Grievant ~~student or parent~~ first knew, or with reasonable diligence should have known, of the decision or action giving rise to the complaint or grievance; and
2. Grievants shall file Level One complaints with the campus principal with a copy to Grievances@risd.org. ~~With the lowest level administrator who has the authority to remedy the alleged problem.~~

   ~~In most circumstances, students and parents shall file Level One complaints with the campus principal.~~

The date and time the complaint form was received shall be noted by the Grievance Coordinator. The Grievance Coordinator shall schedule a hearing with the Grievant within seven business days after receipt of the written complaint. The Grievance Coordinator will communicate to the parties the procedures for the hearing, including time limits.

Following the hearing, the Hearing Officer shall conduct such investigation as is appropriate to fairly respond to the complaint. In reaching a decision, the Hearing Officer may consider information provided at the Level One hearing and any other relevant documents or information the Hearing Officer believes will help resolve

the complaint. The Hearing Officer shall submit the written decision to the Grievance Coordinator.

Absent extenuating circumstances, the Grievance Coordinator shall provide the Grievant the Hearing Officer's written response within seven business days following the hearing. If the student or parent does not receive a decision within the required timeframe, the Grievant may proceed with filing a Level Two complaint as outlined below.

> ~~If the only administrator who has authority to remedy the alleged problem is the Superintendent or designee, the complaint may begin at Level Two following the procedure, including deadlines, for filing the complaint form at Level One.~~

~~If the complaint is not filed with the appropriate administrator, the receiving administrator must note the date and time the complaint form was received and immediately forward the complaint form to the appropriate administrator.~~

~~The appropriate administrator shall investigate as necessary and schedule a conference with the student or parent within seven days after receipt of the written complaint. The administrator may set reasonable time limits for the conference. Following the conference, the administrator shall conduct such investigation as he or she believes is appropriate to fairly respond to the complaint.~~

~~Absent extenuating circumstances, the administrator shall provide the student or parent a written response within seven days following the conference. In reaching a decision, the administrator may consider information provided at the Level One conference and any other relevant documents or information the administrator believes will help resolve the complaint.~~

Level Two

If the student or parent did not receive the relief requested at Level One or if the time for a response has expired, the Grievant ~~student or parent~~ may request a hearing ~~conference with the Superintendent or designee~~ to appeal the Level One decision.

The appeal notice must be filed in writing on the District form~~, on a form provided by the District,~~ within seven business days of the Level One decision being sent to Grievant. ~~date of the written Level One response or, if~~ If no response was received, the appeal must be filed within seven business days of the Level One response issuance deadline. The appeal shall be sent to Grievances@risd.org.

After receiving notice of the appeal, the Grievance Coordinator ~~Level One administrator, with assistance from human resources if needed,~~ shall ~~prepare and~~ forward the notice of appeal and Level

One ~~a~~ record ~~of the Level One complaint~~ to the Level Two Hearing Officer ~~administrator~~. The Grievant ~~student or parent~~ may request a copy of the Level One record from the Grievance Coordinator.

The Level One record shall include:

1. The original complaint form and any attachments;~~.~~
2. All other documents submitted by the student or parent at Level One;~~.~~
3. The written response issued at Level One and any attachments;~~. and~~
4. All other documents relied upon by the Level One administrator in reaching the Level One decision.

The ~~Superintendent or designee~~ Grievance Coordinator shall schedule a hearing ~~conference~~ within seven business days after the appeal notice is filed. The Level Two hearing ~~conference~~ shall be limited to the issues presented on the Level One complaint form and documents ~~considered~~ submitted by the Grievant at the Level One hearing. If the Level One Hearing Officer relied upon additional evidence in making the decision, the Grievant may also submit this evidence as part of their documentation at the Level Two hearing. The Grievance Coordinator will communicate the procedures for the hearing to both parties, including time limits. ~~At the conference, the student or parent may provide information concerning any documents or information relied upon by the administration for the Level One decision. The Superintendent or designee may set reasonable time limits for the conference.~~

~~The Superintendent or designee~~ Following the hearing, the Hearing Officer shall conduct such investigation ~~or review as he or she believes is~~ as necessary to fairly respond to the complaint. ~~grievant's concerns and shall provide the student or parent a written response within seven days following the conference.~~ In reaching a decision, the ~~Superintendent or designee~~ Hearing Officer may consider the Level One record, information provided at the Level Two hearing ~~conference~~, and any other relevant documents or information the ~~Superintendent or designee~~ Hearing Officer believes will help resolve the complaint. The Hearing Officer shall submit the written decision to the Grievance Coordinator.

Absent extenuating circumstances, the Grievance Coordinator shall provide the Grievant the Hearing Officer's written response within seven business days following the hearing.

~~Recordings of the Level One and Level Two conferences, if any, shall be maintained with the Level One and Level Two records.~~

If the Grievant did not receive the relief requested at Level Two or if the time for a response has expired, the Grievant may appeal the decision to the Board. The Level Three appeal notice must be filed in writing on the District form within seven business days of the Level Two decision being sent to the Grievant or, if no response was received, within seven business days of the Level Two response issuance deadline. The appeal shall be sent to Grievances@risd.org.

Informal Mediation Meeting

Prior to scheduling the Level Three hearing, the Grievant will be given the opportunity to engage in an informal mediation meeting with the Superintendent's designee. The informal mediation meeting is voluntary and provides the parties an opportunity to attempt a final resolution prior to the Level Three hearing. Within five business days of submitting the Level Three appeal form, the student or parent shall notify the Grievance Coordinator if Grievant is interested in participating in an informal mediation meeting.

The informal mediation conference will be scheduled within ten business days of the Grievant expressing interest in participating in an informal discussion. Within five business days of the meeting, the Superintendent's designee will send follow-up correspondence to the Grievant. If the Grievant is satisfied with the outcome of the informal mediation meeting, the grievance will be closed. If the Grievant is not satisfied with the outcome of the informal mediation meeting, the Level Three hearing will be forwarded to the Office of General Counsel for scheduling.

Level Three

~~If the student or parent did not receive the relief requested at Level Two or if the time for a response has expired, the student or parent may appeal the decision to the Board.~~

~~The appeal notice must be filed in writing, on a form provided by the District, within seven days of the date of the written Level Two response or, if no response was received, within seven days of the Level Two response deadline.~~

The Level Three hearing shall occur when a quorum of the Board is available to hear the complaint. The ~~Superintendent or designee~~ Office of the General Counsel shall inform the Grievant ~~student or parent~~ of the date, time, and place of the Board meeting at which the complaint will be on the agenda for presentation to the Board.

The ~~Superintendent or designee~~ Office of the General Counsel shall provide the Board the record of the Level Two appeal. The Grievant ~~student or parent~~ may request a copy of the Level Two record from the Office of the General Counsel.

The Level Two record shall include:

1. The Level One record;~~.~~
2. The notice of appeal from Level One to Level Two;~~.~~
3. The written response issued at Level Two and any attachments;~~.~~ and
4. All other documents relied upon by the administration in reaching the Level Two decision.

The Level Three appeal shall be limited to the issues outlined on the Level Two appeal form and documents considered at Level Two, except that if at the Level Three hearing the administration intends to rely on evidence not included in the Level Two record, the administration shall provide the Grievant ~~student or parent~~ notice of the nature of the evidence at least three business days before the hearing.

The District shall determine whether the complaint will be presented in open or closed meeting in accordance with the Texas Open Meetings Act and other applicable law. [See BE]

The Board's presiding officer may set reasonable time limits and guidelines for the presentation, including an opportunity for the Grievant ~~student or parent~~ and administration to each make a presentation and provide rebuttal and an opportunity for questioning by the Board. The hearing procedures shall be provided to both parties prior to the hearing. The Board shall hear the complaint and may request that the administration provide an explanation for the decisions at the preceding levels.

In addition to any other record of the Board meeting required by law, the Board shall prepare a separate record of the Level Three presentation. The Level Three presentation, including the presentation by the Grievant ~~student or parent or the student's representative~~, any presentation from the administration, and questions from the Board with responses, shall be recorded by audio recording, video/audio recording, or court reporter, at the presiding officer's discretion.

The Board shall then consider the complaint. It may give notice of its decision orally or in writing at any time up to and including the next regularly scheduled Board meeting. If the Board does not make a decision regarding the complaint by the end of the next regularly scheduled meeting, the lack of a response by the Board upholds the administrative decision at Level Two.

BOARD OF TRUSTEES
RICHARDSON INDEPENDENT SCHOOL DISTRICT
RICHARDSON, TEXAS

Date: February 22, 2024
Submitted by: Dr. Christopher Goodson, Assistant Superintendent- Human Resources; Leticia D. McGowan, General Counsel

ACTION ITEM

TOPIC: Revision to Policy DGBA (LOCAL) – Employee Complaints/Grievances

BACKGROUND INFORMATION:

Staff regularly review local policies to ensure they conform to District needs, applicable law, and best practices. The recommendation is to revise DGBA (LOCAL) – Employee Complaints/Grievances. The recommended revisions to the policy are to align the policy to the changes proposed for FNG(LOCAL). Administration has recommended revisions including providing a definition of Grievance Coordinator, clarifying that deadlines are by business days rather than calendar days, altering some timelines based on the use of business days, changing the flow of the information, clearly identifying the informal mediation process and other changes to address process concerns that have been raised in the last year. The following policy is provided for the Board's review:

DGBA (LOCAL) – Employee Complaints/Grievances

SUPERINTENDENT'S RECOMMENDATION:

The Superintendent recommends that the Board approve the proposed revision to Policy DGBA (LOCAL) – Employee Complaints/Grievances.

PROPOSED RESOLUTION

WHEREAS, the Board of Trustees regularly reviews and updates its policies to ensure they conform to applicable law, best practices, and the Board's mission, beliefs, and strategic objectives; and

WHEREAS, the Board has reviewed the proposed revision to Policy DGBA (LOCAL) as presented by staff, and finds that the proposed revision to Policy DGBA (LOCAL) are appropriate and necessary to ensure that the District's policy conforms to applicable law, best practices, and the Board's mission, beliefs, and strategic objectives;

THEREFORE, BE IT RESOLVED, that the Board of Trustees of the Richardson Independent School District adopts and approves the proposed revision to Policy DGBA (LOCAL).

Complaints

In this policy, the terms “complaint” and “grievance” shall have the same meaning.

Other Complaint Processes

Employee complaints shall be filed in accordance with this policy, except as required by the policies listed below. Some of these policies require appeals to be submitted in accordance with DGBA after the relevant complaint process:

1. Complaints alleging discrimination, including violations of Title IX (gender), Title VII (sex, race, color, religion, national origin), ADEA (age), or Section 504 (disability), shall be submitted in accordance with DIA.
2. Complaints alleging certain forms of harassment, including harassment by a supervisor and violation of Title VII, shall be submitted in accordance with DIA.
3. Complaints concerning retaliation relating to discrimination and harassment shall be submitted in accordance with DIA.
4. Complaints concerning instructional resources shall be submitted in accordance with the EF series.
5. Complaints concerning a commissioned peace officer who is an employee of the District shall be submitted in accordance with CKE.
6. Complaints concerning the proposed nonrenewal of a term contract issued under Chapter 21 of the Education Code shall be submitted in accordance with DFBB.
7. Complaints concerning the proposed termination or suspension without pay of an employee on a probationary, term, or continuing contract issued under Chapter 21 of the Education Code during the contract term shall be submitted in accordance with DFAA, DFBA, or DFCA.

Notice to Employees

The District shall inform employees of this policy through appropriate District publications.

Guiding Principles

Informal Process

The Board encourages employees to discuss their concerns with their supervisor, principal, or other appropriate administrator who has the authority to address the concerns. Concerns should be expressed as soon as possible to allow early resolution at the lowest possible administrative level. An employee whose concerns are resolved may withdraw a formal complaint at any time.

Informal resolution shall be encouraged but shall not extend any filing deadlines in this policy. ~~, except by mutual written consent.~~ The burden of proof for the hearing is on the employee filing the complaint.

If the only administrator who has authority to remedy the alleged problem is the Superintendent or designee, the complaint may, at the District's discretion, begin at Level Two following the procedure, including deadlines, for filing the Level One complaint form.

If the complaint is not filed with the appropriate administrator, the receiving administrator must note the date and time the complaint form was received and immediately forward the complaint form to the appropriate administrator.

Level One and Level Two hearings are not recorded. An employee who files a grievance may make an audio recording of any hearing or meeting at which the substance of the employee's grievance that complies with this policy is discussed or investigated. The employee's audio recording shall not result in a delay of any timeline under this policy. The employee must provide his or her own equipment to make any such recording. If a recording is made, recordings of the Level One and Level Two hearings, if any, shall be maintained with the Level One and Level Two records.

The process described in this policy shall not be construed to create new or additional rights beyond those granted by law or Board policy, nor to require a full evidentiary hearing or "mini-trial" at any level.

Direct Communication with Board Members

The Grievant, as defined further in this policy, ~~Employees~~ shall not be prohibited from communicating with a member of the Board regarding District operations except when communication between the Grievant ~~an employee~~ and a Board member would be inappropriate because of a pending hearing or appeal related to the Grievant's pending grievance. ~~employee.~~

Filing ~~Formal Process~~

Complaint forms and appeal notices may be filed by hand-delivery, by electronic communication, including email and fax, or by U.S. Mail. Filings shall be deemed timely filed if:

1. For hand-delivered filings, if received at the Administration Building front desk by the close of business (4:30 p.m. unless otherwise indicated in writing) on the deadline date;
2. For filings submitted by electronic communication, if they are received at Grievances@risd.org by the close of business (4:30 p.m. unless otherwise indicated in writing) on the deadline date, as indicated by the date/time shown on the electronic communication;
3. For mail filings, if postmarked by the U.S. Postal Service on or before the deadline date and received by the appropriate administrator or the Grievance Coordinator no more than three business days after the deadline.

~~An employee may initiate the formal process described below by timely filing a written complaint form.~~

~~Even after initiating the more formal complaint process, employees are encouraged to seek informal resolution of their concerns. An employee whose concerns are resolved may withdraw a formal complaint at any time.~~

~~The process described in this policy shall not be construed to create new or additional rights beyond those granted by law or Board policy, nor to require a full evidentiary hearing or "mini-trial" at any level.~~

Freedom from Retaliation

Neither the Board nor any District employee shall unlawfully retaliate against an employee for bringing a concern or complaint.

Whistleblower Complaints

Whistleblower complaints shall be filed within the time specified by law and may be made to the Superintendent or designee beginning at Level Two. Timelines for the employee and the District set out in this policy may be shortened to allow the Board to make a final decision within 60 calendar days of the initiation of the complaint. [See DG]

Complaints Against Supervisors

Complaints alleging a violation of law by a supervisor may be made to the Superintendent or designee. Complaint forms alleging a violation of law by the Superintendent may be submitted directly to the Board or designee.

General Provisions

~~Filing~~

~~Complaint forms and appeal notices may be filed by hand-delivery, by electronic communication, including email and fax, or by U.S. Mail. Hand-delivered filings shall be timely filed if received by the appropriate administrator or designee by the close of business (4:30 p.m) on the deadline. Filings submitted by electronic communication shall be timely filed if they are received by the close of business (4:30 p.m.) on the deadline, as indicated by the date/time shown on the electronic communication. Mail filings shall be timely filed if they are postmarked by U.S. Mail on or before the deadline and received by the appropriate administrator or designated representative no more than three days after the deadline.~~

Scheduling Hearings ~~Conferences~~

The District shall make reasonable attempts to schedule hearings ~~conferences~~ at a mutually agreeable time. If the Grievant ~~employee~~ fails to appear at a scheduled hearing ~~conference~~, the District may hold the hearing ~~conference~~ and issue a decision in the Grievant's ~~employee's~~ absence.

Decision ~~Response~~

At Levels One and Two, "decision" ~~"response"~~ shall mean a written communication to the Grievant ~~employee~~ from the appropriate administrator. Responses may be hand-delivered, sent by electronic

communication to the Grievant's ~~employee's~~ email address of record, or sent by U.S. Mail to the Grievant's ~~employee's~~ mailing address of record. Mailed responses shall be timely if they are postmarked by U.S. Mail on or before the deadline.

Days

For purposes of this policy, "days" shall mean District business ~~calendar~~ days. In calculating timelines under this policy, the day a document is filed or served is "day zero," and all deadlines shall be determined by counting the following business day as "day one." A District business day does not include a school holiday or a day on which District administrative offices are closed for business. If a deadline falls on a school holiday or other day on which District administrative offices are closed for business, then the deadline shall be extended to the first business day following the holiday or closure.~~"~~

Grievant

"Grievant" is defined as the employee bringing forth the complaint. The Grievant may have, but is not required to have, a representative as the term is defined below. For purpose of this policy, references to "Grievant" shall also include the Grievant's representative.

Grievance Coordinator

The "Grievance Coordinator" is the designated District employee who serves as the point of contact for receipt of grievance complaints. The Grievance Coordinator is responsible for coordinating and scheduling hearings and communicating with the parties, unless otherwise noted in this policy.

Representative

"Representative" shall mean any person ~~who~~ or ~~an~~ organization that does not claim the right to strike and is designated by the Grievant ~~employee~~ to represent him or her in the complaint process.

The employee may designate a representative through written notice to the District at any level of this process. The representative may participate in person, ~~or~~ by telephone conference call or virtually. If the Grievant ~~employee~~ designates a representative with fewer than three days' notice to the District before a scheduled ~~conference or~~ hearing, the District may reschedule the ~~conference or~~ hearing to a later date, if desired, in order to include the District's legal counsel. The District may be represented by legal counsel at any level of the process.

Consolidating Complaints

Complaints arising out of an event or a series of related events shall be addressed in one complaint. A Grievant ~~Employees~~ shall

not file separate or serial complaints arising from any event or series of events that have been or could have been addressed in a previous complaint.

When two or more complaints are sufficiently similar in nature and the remedy sought to permit their resolution through one proceeding, the District may consolidate the complaints.

The Grievance Coordinator ~~Superintendent or designee~~ is authorized to take such actions as are reasonable and necessary to ensure the effective and efficient operation of the complaint process, which may include combining similar complaints, beginning the process at Level Two, offering a method of alternative dispute resolution, or other actions the Grievance Coordinator ~~Superintendent~~ deems appropriate under the circumstances.

Untimely Filing~~s~~ of Complaint

All time limits for filing shall be strictly followed ~~unless modified by mutual written consent~~.

If a complaint form or appeal notice is not timely filed, the complaint may be dismissed, on written notice to the Grievant ~~employee~~, at any point during the complaint process. The Grievant employee may appeal the dismissal due to untimeliness by seeking review in writing within seven business days from the date of the written dismissal notice was sent. ~~, starting at the level at which the complaint was dismissed. Such appeal shall be limited to the issue of timeliness.~~ The review will begin at the level at which the complaint was dismissed and shall be limited to the issue of timeliness.

Costs Incurred

Each party shall pay its own costs incurred in the course of the complaint.

Complaint and Appeal Forms

Complaints and appeals under this policy shall be submitted in writing on a form provided by the District. The following will govern the submission of the complaint and appeal forms:

1. A copy ~~Copies~~ of any documents that support the complaint should be attached to the complaint form.
2. If the Grievant ~~employee~~ does not have a copy ~~copies~~ of the ~~these~~ supporting documents, when filing the initial Level One complaint, a copy of the supporting documents ~~they~~ may be presented at the Level One hearing ~~conference~~.
3. After the Level One hearing ~~conference~~, no new documents may be submitted by the Grievant ~~employee~~ unless the Grievant ~~employee~~ did not know the documents existed before the Level One ~~conference or the~~ hearing officer allows the introduction of the documents.

Amendment of Complaint

A complaint or appeal form that is incomplete in any material aspect may be dismissed but may be refiled with all the required information if the refiling is within the designated time for filing. An amendment does **not** restart the timeline for submission.

~~Audio Recording~~

~~An employee who reports a grievance that complies with this policy may make an audio recording of any conference or meeting at which the substance of the employee's grievance is discussed. The employee's audio recording shall not result in a delay of any timeline under this policy. The employee must provide his or her own equipment to make any such recording.~~

Level One

Complaint forms must be filed:

1. Within ten business~~15~~ days of the date the Grievant ~~employee~~ first knew, or with reasonable diligence should have known, of the decision or action giving rise to the complaint or grievance; and

2. ~~With the lowest level administrator who has the authority to remedy the alleged problem.~~ In most circumstances, Grievants ~~employees~~ on a school campus shall file Level One complaints with the campus principal with a copy to Grievances@risd.org; other ~~District employees~~ Grievants shall file Level One complaints with their immediate supervisor with a copy to Grievances@risd.org.

~~If the only administrator who has authority to remedy the alleged problem is the Superintendent or designee, the complaint may begin at Level Two following the procedure, including deadlines, for filing the complaint form at Level One.~~

~~If the complaint is not filed with the appropriate administrator, the receiving administrator must note the date and time the complaint form was received and immediately forward the complaint form to the appropriate administrator.~~

The date and time the complaint form was received shall be noted by the Grievance Coordinator. The Grievance Coordinator ~~appropriate administrator~~ shall schedule a hearing ~~conference~~ with the Grievant ~~employee~~ within seven business days after receipt of the written complaint. The Grievance Coordinator ~~administrator~~ will communicate to the parties the procedures for the hearing, including time limits. ~~may set reasonable time limits for the conference.~~

Following the hearing ~~conference~~, the Hearing Officer ~~administrator may~~ shall conduct such investigation as ~~he or she may believe~~ is appropriate to fairly respond to the complaint. ~~employee's concerns.~~ In reaching a decision, the Hearing Officer may consider information provided at the Level One hearing and any other relevant

documents or information the Hearing Officer believes will help resolve the complaint. The Hearing Officer shall submit his or her written decision to the Grievance Coordinator. ~~Such investigation may include reviewing relevant documents, talking with persons who have knowledge of relevant facts, or other such actions the administrator believes will help resolve the complaint.~~

Absent extenuating circumstances, the Grievance Coordinator ~~administrator~~ shall provide the Grievant ~~employee a~~ the Hearing Officer's written response within seven business days following the hearing. ~~conference. In reaching a decision, the administrator may consider information provided at the Level One conference and any other relevant documents or information the administrator believes will help resolve the complaint.~~

Level Two

If the Grievant ~~employee~~ did not receive the relief requested at Level One or if the time for a response has expired, the Grievant ~~employee~~ may proceed with filing a Level Two complaint appeal as outlined below. ~~request a conference with the Superintendent or designee to appeal the Level One decision.~~

The appeal notice must be filed in writing on the District form ~~, on a form provided by the District,~~ within seven business days of the ~~date of the~~ written Level One decision being sent to Grievant ~~response~~ or, if no response was received, within seven business days of the Level One ~~response~~ decision issuance deadline. The appeal shall be sent to Grievances@risd.org.

After receiving notice of the appeal, the Grievance Coordinator shall forward the notice of appeal and Level One record to the Level Two Hearing Officer. The Grievant may request a copy of the Level One record from the Grievance Coordinator.

~~After receiving notice of the appeal, the Level One administrator, with assistance from human resources if necessary, shall prepare and forward a record of the Level One complaint to the Level Two administrator.~~

The Level One record shall include:

1. The original complaint form and any attachments;~~.~~
2. All other documents submitted by the Grievant ~~employee~~ at Level One;~~.~~
3. The written response issued at Level One and any attachments; and ~~.~~
4. All other documents relied upon by the Level One administrator in reaching the Level One decision.

The Grievance Coordinator ~~Superintendent or designee~~ shall schedule a hearing ~~conference~~ within seven business days after the appeal notice is filed. The Level Two hearing ~~The conference~~ shall be limited to the issues presented on the Level One complaint form and documents submitted ~~considered~~ at the Level One hearing. ~~At the conference, the employee may provide information concerning any documents or information relied upon by the administration for the Level One decision. The Superintendent or designee may set reasonable time limits for the conference.~~

If the Level One Hearing Officer relied upon additional evidence in making the decision, the Grievant may also submit this evidence as part of their documentation at the Level Two hearing. The Grievance Coordinator will communicate the procedures for the hearing to both parties, including time limits.

Following the hearing, the Hearing Officer shall conduct such investigation as he or she believes is necessary to fairly respond to the complaint. In reaching a decision, the Hearing Officer may consider the Level One record, information provided at the Level Two hearing, and any other relevant documents or information the Hearing Officer believes will help resolve the complaint. The Hearing Officer shall submit the written decision to the Grievance Coordinator.

Absent extenuating circumstances, the Grievance Coordinator shall provide the Grievant the Hearing Officer's written response within seven business days following the hearing.

~~The Level Two hearing officer shall conduct such investigation or review as he or she believes is necessary to fairly respond to the employee's concerns and shall provide the employee a written response within seven days following the conference. In reaching a decision, the Superintendent or designee may consider the Level One record, information provided at the Level Two conference, and any other relevant documents or information the Superintendent or designee believes will help resolve the complaint.~~

~~Recordings of the Level One and Level Two conferences, if any, shall be maintained with the Level One and Level Two records.~~

~~**Level Three**~~

If the Grievant ~~employee~~ did not receive the relief requested at Level Two or if the time for a response has expired, the Grievant ~~employee~~ may appeal the decision to the Board.

The Level Three appeal notice must be filed in writing on the District form~~, on a form provided by the District,~~ within seven business days of the date of the written Level Two decision being sent to the Grievant ~~response~~ or, if no response was received, within seven

business days of the Level Two decision issuance ~~response~~ deadline. The appeal shall be sent to Grievances@risd.org.

Informal Mediation Meeting

Prior to scheduling the Level Three hearing, the Grievant will be given the opportunity to engage in an informal mediation meeting with the Superintendent's designee. The informal mediation meeting is voluntary and provides the parties an opportunity to attempt a final resolution prior to the Level Three hearing. Within five business days of submitting the Level Three appeal form, the Grievant shall notify the Grievance Coordinator if Grievant is interested in participating in an informal mediation meeting.

The informal mediation meeting will be scheduled within ten business days of the Grievant expressing interest in participating in an informal discussion. Within five business days of the meeting, the Superintendent's designee will send follow-up correspondence to the Grievant. If the Grievant is satisfied with the outcome of the informal mediation meeting, the grievance will be closed. If the Grievant is not satisfied with the outcome of the informal mediation meeting, the Level Three hearing will be forwarded to the Office of General Counsel for scheduling.

~~Employees who seek a Level Three hearing shall first meet with the Board's designee to review the complaint. The Board's designee shall schedule a meeting within seven days of receiving the Level Three request to consider the complaint and explore avenues of resolution. If the complaint is not resolved, the Board's designee shall conduct any further investigation he or she believes is appropriate to fairly consider the complaint and shall prepare a written recommendation and schedule a hearing for an upcoming Board meeting. The employee shall receive a copy of the recommendation before the scheduled hearing.~~

Level Three

The Level Three hearing shall occur when a quorum of the Board is available to hear the complaint. The Office of the General Counsel ~~The Superintendent or designee~~ shall inform the Grievant ~~employee~~ of the date, time, and place of the Board meeting at which the complaint will be on the agenda for presentation to the Board.

The Office of the General Counsel ~~Superintendent or designee~~ shall provide the Board the record of the Level Two appeal. The Grievant ~~employee~~ may request a copy of the Level Two record from the Office of the General Counsel.

The Level Two record shall include:

1. The Level One record;~~.~~
2. The notice of appeal from Level One to Level Two;~~.~~

3. The written response issued at Level Two and any attachments; and .

4. All other documents relied upon by the administration in reaching the Level Two decision.

The Level Three appeal shall be limited to the issues outlined on the Level Two appeal form and documents considered at Level Two hearing. ~~, except that if~~ If at the Level Three hearing the administration intends to rely on evidence not included in the Level Two record, the administration shall provide the Grievant ~~employee~~ notice of the nature of the evidence at least three business days before the hearing.

The District shall determine whether the complaint will be presented in open or closed meeting in accordance with the Texas Open Meetings Act and other applicable law. [See BE]

The Board's presiding officer may set reasonable time limits and guidelines for the presentation, including an opportunity for the Grievant ~~employee~~ and administration to each make a presentation and provide rebuttal and an opportunity for questioning by the Board. The hearing procedures shall be provided to both parties prior to the hearing.The Board shall hear the complaint and may request that the administration provide an explanation for the decisions at the preceding levels.

In addition to any other record of the Board meeting required by law, the Board shall prepare a separate record of the Level Three presentation. The Level Three presentation, including the presentation by the Grievant ~~employee or the employee's representative~~, any presentation from the administration, and questions from the Board with responses, shall be recorded by audio recording, video/audio recording, or court reporter, at the presiding officer's discretion.

The Board shall then consider the complaint. It may give notice of its decision orally or in writing at any time up to and including the next regularly scheduled Board meeting. If the Board does not make a decision regarding the complaint by the end of the next regularly scheduled meeting, the lack of a response by the Board upholds the administrative decision at Level Two.

BOARD OF TRUSTEES
RICHARDSON INDEPENDENT SCHOOL DISTRICT
RICHARDSON, TEXAS

Date: February 22, 2024
Submitted by: Dr. Matthew Gibbins, Assistant Superintendent- Administrative Services; Leticia D. McGowan, General Counsel

ACTION ITEM

TOPIC: Amendment to Policy FFAC (LOCAL) - Wellness and Health Services: Medical Treatment

BACKGROUND INFORMATION:

Staff regularly review local policies to ensure they conform to District needs, applicable law, and best practices. The recommendation is to amend FFAC (LOCAL) - Wellness and Health Services: Medical Treatment. The recommended revisions are to incorporate legislative changes from Senate Bill 629. Senate Bill 629 requires a district to adopt a policy regarding maintenance, administration, and disposal of opioid antagonists at each campus that serves students in grades 6 through 12. The proposed amendments reflect this requirement and expands the policy to all grade levels.

The following policy is provided for the Board's review:

a. FFAC (LOCAL) - Wellness and Health Services: Medical Treatment

SUPERINTENDENT'S RECOMMENDATION:

The Superintendent recommends that the Board approve the proposed revision to Policy FFAC (LOCAL).

PROPOSED RESOLUTION

WHEREAS, the Board of Trustees regularly reviews and updates its policies to ensure they conform to applicable law, best practices, and the Board's mission, beliefs, and strategic objectives; and

WHEREAS, the Board has reviewed the proposed revision to Policy FFAC (LOCAL) as presented by staff, and finds that the proposed revision to Policy FFAC (LOCAL) are appropriate and necessary to ensure that the District's policy conforms to applicable law, best practices, and the Board's mission, beliefs, and strategic objectives;

THEREFORE, BE IT RESOLVED, that the Board of Trustees of the Richardson Independent School District adopts and approves the proposed revision to Policy FFAC (LOCAL).

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

Medication Provided by Parent

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

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

Medication Provided by District

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

Opioid Antagonist

This provision shall be applicable to every campus.

On Campus

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

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

Maintenance, Availability, Training, and Reporting

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

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

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

Psychotropics

Except as permitted by law, an employee shall not:

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

Medical Treatment

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

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

BOARD OF TRUSTEES
Richardson Independent School District
Richardson, Texas

Date: February 22, 2024

Submitted by: David Pate, Assistant Superintendent of Finance & Support Services

ACTION ITEM

TOPIC: **Gifts**

BACKGROUND INFORMATION:

The following gifts to the Richardson Independent School District were received as of January 2024. The Board of Trustees formally accepts gifts to the District of $5,000 or more as described on the following pages. Gifts or donations of less than $5,000 and a cumulative year-to-date total are also included for your information.

The Board's acceptance of gifts shall not be construed as a testimonial or endorsement by the Board or the District of a product or business enterprise.

By acknowledging these gifts and formally accepting those of $5,000 or more, the Board also ratifies corresponding adjustments to the applicable organizations' budgets. Gifts of equipment or supplies do not require an adjustment in an organization's budget. The Superintendent's Advisory Council has approved this adjustment. Staff will provide the Board with the necessary information to formally amend the District's overall budget at the appropriate time.

SUPERINTENDENT'S RECOMMENDATION:

The Superintendent recommends that the Board accept the gifts of $5,000 or more as listed on the following pages.

RESOLUTION

WHEREAS, the Board of Trustees has considered the gifts of $5,000 or more as listed on the following pages; and

WHEREAS, the Board recognizes that monetary gifts to the District will require an adjustment to the overall adopted budget; and

WHEREAS, ensuring timely and accurate financial record keeping supports the Board's Strategic Objectives and Strategies;

THEREFORE, BE IT RESOLVED, that the Board of Trustees of the Richardson Independent School District accepts the gifts of $5,000 or more as listed on the following pages and approves amending the District's overall budget to reflect receipt of the monetary gifts.

$5,000 or More

To	From	Purpose	Cash Received	Estimated Supply/Equip Value
RISD Career Technology Education	NAF Be Future Ready	Engineering programs	$5,000.00	
			$5,000.00	**$0.00**

Total Cash & Supply/Equipment Value - Gifts Over $5,000 **$5,000.00**
February 2024

Less Than $5,000

To	From	Purpose	Cash Received	Estimated Supply/Equip
Bowie Elementary	Michael Reynolds	Refrigerator for teachers lounge		$1,500.00
Canyon Creek Elementary	CCE PTA	Student incentives	$100.80	
Canyon Creek Elementary	Cotton Bowl Foundation	Supplemental art supplies	$500.00	
Forest Lane Academy	Association for Learning Environments	Supplemental instructional supplies	$2,500.00	
Forest Meadow Junior High	Anonymous donor Wells Fargo Blackbaud Giving Fund	Student incentives	$750.00	
Forest Meadow Junior High	FMJH PTA	Supplemental art supplies and supplies for fair	$1,055.93	
Forest Meadow Junior High	Lake Highlands Wildcat Club	Supplemental athletics supplies	$2,200.00	
Lake Highlands Junior High	Anonymous donor Wells Fargo Blackbaud Giving Fund	Supplemental supplies	$100.00	
Lake Highlands Junior High	Lake Highlands Wildcat Club	Supplemental athletics supplies	$2,200.00	
Merriman Park Elementary	MPE PTA	Student snacks	$562.45	
Mohawk Elementary	Cotton Bowl Foundation	Supplemental art supplies	$500.00	
Mohawk Elementary	MOH PTA	Supplemental art and PE supplies	$1,203.75	
Northlake Elementary	Anonymous donor Wells Fargo Blackbaud Giving Fund	Supplemental art supplies	$180.00	
Northlake Elementary	Cotton Bowl Foundation	Supplemental art supplies	$500.00	
O Henry Elementary	Anonymous donors via Donors Choose	Supplemental art supplies		$420.40
Parkhill Junior High	Anonymous donor Wells Fargo Blackbaud Giving Fund	Supplemental instructional supplies	$125.00	
Parkhill Junior High	Dallas Bible Church	Supplemental instructional supplies		$1,000.00
Prestonwood Elementary	Joy Webb	Transportation for STEP team	$100.00	
Prestonwood Elementary	PWE PTA	Math program, field trip	$2,012.00	
RISD Career Technology Education	Emily Villamar-Robbins	Support of programing	$500.00	
RISD Schools	Anonymous donor Wells Fargo Blackbaud Giving Fund	Supplemental instructional supplies	$500.00	
Thurgood Marshall Elementary	Operation Impact	Student support		$1,500.00
Thurgood Marshall Elementary	Soles for Souls	Student support		$725.00
Thurgood Marshall Elementary	TME PTA	Student headphones	$1,750.00	
White Rock Elementary	Anonymous donors via Donors Choose	Supplemental art supplies		$499.03
			$17,339.93	**$5,644.43**

Total Cash & Supply/Equipment Value - Gifts Under $5,000 **$22,984.36**

Grand Total of All Gifts Over & Under $5,000 **$27,984.36**
February 2024

Prior Year Comparison

Fiscal YTD Cash & Supply/Equipment Value - Gifts Over $5,000	$380,383.91
Fiscal YTD Cash & Supply/Equipment Value - Gifts Under $5,000	$95,277.72
Fiscal YTD Total of All Gifts Over & Under $5,000 **February 2024**	**$475,661.63**
Fiscal YTD Total of All Gifts Over & Under $5,000 **February 2023**	**$342,265.85**
Increase / (decrease) compared to prior year	**$133,395.78**

BOARD OF TRUSTEES
Richardson Independent School District
Richardson, Texas

Date: February 22, 2024

Submitted by: David Pate, Assistant Superintendent of Finance & Support Services

ACTION ITEM

TOPIC: **Ratify Client Service Agreement with United States Conference of Catholic Bishops for Services to Refugee and Asylee Students**

BACKGROUND INFORMATION:

The US Department of Health and Human Services, Office of Refugee Resettlement (ORR) provides grants to state and state-alternative programs to support school districts impacted by school-aged refugees and ORR-eligible populations. The United States Conference of Bishops receives funding from ORR for Bridging Refugee Youth and Children's Services including the programmatic and financial support for Refugee Student Impact Grants. RISD is the recipient of the Refugee Student Impact Grant and uses grant funds to ensure educational equity for refugee and asylee students and their families, including supporting students social and cultural assimilation while enhancing their academic performance. The term of the grant started 10/1/2023 and will end 9/30/2024. The RISD will receive a total of $960,000 from the grant. RISD personnel have been working to finalize the Memorandum of Understanding since October and have recently received the final version of the agreement.

SUPERINTENDENT'S RECOMMENDATION:

The Board of Trustees of the Richardson Independent School District ratifies the agreement with the United States Conference of Catholic Bishops to receive funding from ORR for Bridging Refugee Youth and Children's Services.

PROPOSED RESOLUTION

WHEREAS, the Board of Trustees, consistent with the requirement to maintain proper contract compliance, is required to approve certain transactions in advance of the implementation of services; and

WHEREAS, services under the proposed agreement were performed prior to a final agreement being executed; and

WHEREAS, the district seeks to enter into and ratify the final agreement;

BE IT THEREFORE RESOLVED, that the Board of Trustees of the Richardson Independent School District hereby ratifies the agreement with the United States Conference of Catholic Bishops to receive funding from ORR for Bridging Refugee Youth and Children's Services a.

APPROVED on the 22nd day of February 2024.

Board of Trustees

By: _____
Name: Regina Harris
Title: President

Date Signed: February 22, 2024

ATTEST:

By: _____
Name: Chris Poteet
Title: Secretary

Date Signed: February 22, 2024

BOARD OF TRUSTEES
Richardson Independent School District
Richardson, Texas

Date: February 22, 2024

Submitted by: David Pate, Assistant Superintendent of Finance & Support Services

ACTION ITEM

TOPIC: **Ratify User Access Agreement with the Texas Department of Public Safety**

BACKGROUND INFORMATION:

The Texas Department of Public Safety User Agreement for access to Driver Record Services allows RISD to monitor motor vehicle records for all drivers of District owned and/or rented vehicles. The amount of this agreement is $0.

SUPERINTENDENT'S RECOMMENDATION:

The Board of Trustees of the Richardson Independent School District ratifies the interlocal agreement with the Texas Department of Public Safety for user access to the Driver Record Services.

PROPOSED RESOLUTION

WHEREAS, the Board of Trustees, consistent with the requirement to maintain proper contract compliance, is required to approve certain transactions in advance of the implementation of services; and

WHEREAS, services under the proposed agreement were provided prior to a final agreement being approved by the Board of Trustees; and

WHEREAS, the district seeks to enter into and ratify the final interlocal agreement;

BE IT THEREFORE RESOLVED, that the Board of Trustees of the Richardson Independent School District hereby ratifies the interlocal agreement with Texas Department of Public Safety.

APPROVED on the 22nd day of February 2024.

Board of Trustees

By: _____
Name: Regina Harris
Title: President

Date Signed: February 22, 2024

ATTEST:

By: _____
Name: Chris Poteet
Title: Secretary

Date Signed: February 22, 2024

BOARD OF TRUSTEES
Richardson Independent School District
Richardson, Texas

Date: February 22, 2024

Submitted by: Christopher Goodson, Assistant Superintendent of Human Resources

ACTION ITEM

TOPIC: **Ratify Maintenance Agreement and Current Expenditures with IdentiSys, Inc.**

BACKGROUND INFORMATION:

IdentiSys, Inc. is the provider of equipment and software the Human Resources Department utilizes to perform in-house fingerprinting of our employees and substitutes. The Maintenance contract covers on-site repairs, parts, labor, and travel associated with repairing and/or preventative maintenance to our fingerprinting equipment.

SUPERINTENDENT'S RECOMMENDATION:

The Board of Trustees of the Richardson Independent School District ratifies the agreement and current expenditures with IdentiSys, Inc.

PROPOSED RESOLUTION

WHEREAS, the Board of Trustees, consistent with the requirement to maintain proper contract compliance, is required to approve certain transactions in advance of the implementation of service; and

WHEREAS, initial services under the proposed agreement were provided prior to a final agreement being approved by the Board of Trustees; and

WHEREAS, the district seeks to enter into and ratify the agreement and current expenditures with IdentiSys, Inc;

BE IT THEREFORE RESOLVED, that the Board of Trustees of the Richardson Independent School District hereby ratifies the agreement and current expenditures with IdentiSys, Inc.

APPROVED on the 22nd day of February 2024.

Board of Trustees

By: _____
Name: Regina Harris
Title: President

Date Signed: February 22, 2024

ATTEST:

By: _____
Name: Chris Poteet
Title: Secretary

Date Signed: February 22, 2024

BOARD OF TRUSTEES
Richardson Independent School District
Richardson, Texas

Date: **February 22, 2024**

Submitted by: **Mike Jasso, Chief of Staff**

ACTION ITEM

TOPIC: 2025-2026 Academic Calendar

Background Information:

The Board of Trustees charged the leadership team to create a calendar committee to review and provide a recommendation to the Board. The committee composition included parents/community representatives from all four learning communities, staff and central leadership. The committee met on October 30th and reviewed the calendar requirements and calendar options. After considerable deliberation, the 2023-2024 Calendar Committee brought forward two calendars for the Board's consideration. Both options were presented at the January 18, 2024 Board of Trustees Meeting. Both calendars meet the minimum requirements for the 75,600 minutes as required legislatively and allow for "banked" minutes in case of an emergency.

Additionally, the District Planning Committee met on December 12, 2024 and was given an opportunity to review and provide input on the 2025-26 calendar. One of the essential roles of the District Planning Committee, as defined by Texas Education Code, is to review and provide input on the adoption of the academic calendar. The DPC has 52 members representing elementary, secondary, staff, parents and business community.

After careful review, key considerations for both committees in considering the calendar options included:

- Instructional needs must drive the calendar
- Consider parent/family implications for childcare
- Balance days in each quarter; balance days in each semester
- Professional Development is positioned throughout the year to support teacher practice
- Complete 1st semester prior to winter break
- Utilize professional development day on election day
- Consider athletic/fine arts summer practice calendar

SUPERINTENDENT'S RECOMMENDATION: The Superintendent recommends that the Richardson Independent School District Board of Trustees approve Option B as the 2025-26 Academic calendar (see attached calendar).

UPDATED 11/07/2023

DRAFT 2025-2026 CALENDAR OPTION A

AUGUST 2025

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SEPTEMBER 2025

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OCTOBER 2025

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NOVEMBER 2025

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DECEMBER 2025

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JANUARY 2026

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FEBRUARY 2026

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MARCH 2026

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APRIL 2026

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MAY 2026

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August 12 ..... *First Day of School*

September 1 ..... **Labor Day**

October 9 ..... *First Grading Period Ends*

October 10 ..... **Student Holiday/Staff Professional Learning Day**

October 13 ..... **State Fair Holiday**

November 3-4 ..... **Student Holiday/Staff Professional Learning Day**

November 24-26 ..... **Student Holiday/Staff Exchange Days**

November 27-28 ..... **Thanksgiving Holiday**

December 19 ..... *Second Grading Period Ends*

December 22 - January 2 ..... **Winter Break**

January 5 ..... **Student Holiday/Staff Professional Learning Day**

January 6 ..... *Second Semester Begins*

January 19 ..... **Martin Luther King Jr. Day Holiday**

February 16 ..... **Student Holiday/Staff Professional Learning Day**

March 6 ..... *Third Grading Period Ends*

March 16-20 ..... **Spring Break**

April 3 ..... **Make-Up Day**

May 1 ..... **Make-Up Day**

May 22 ..... *Fourth Grading Period Ends/Last Day of School*

May 25 ..... **Memorial Day Holiday**

CALENDAR SYMBOLS KEY

- Student and Staff Holiday
- Student Holiday/Staff Professional Learning Day
- Student Holiday/Staff Exchange Day
- ❄ Make-Up Day (if needed, subject to change)
- Early Release
- Grading Period Ends

Block schedule for secondary schools is indicated by the small letter beside the calendar date.

SCHOOL HOURS

Pre-K Programs	Check with home campus
Dobie Pre-K	7:30 a.m. - 2:50 p.m.
Elementary	7:50 a.m. - 3:10 p.m.
Junior High	8:15 a.m. - 3:40 p.m.
High School	9 a.m. - 4:20 p.m.

Early release dismissal is two hours ahead of normal dismissal time.

UPDATED 11/07/2023

DRAFT 2025-2026 CALENDAR OPTION B

AUGUST 2025

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SEPTEMBER 2025

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OCTOBER 2025

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NOVEMBER 2025

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DECEMBER 2025

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JANUARY 2026

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FEBRUARY 2026

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MARCH 2026

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APRIL 2026

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MAY 2026

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August 11 ..... **Staff Professional Learning Day**
August 12 ..... *First Day of School*
September 1 ..... **Labor Day**
October 9 ..... *First Grading Period Ends*
October 10-13 ..... **Fall Break**
November 3-4 ..... **Student Holiday/Staff Professional Learning Day**
November 24-26 ..... **Student Holiday/Staff Exchange Days**
November 27-28 ..... **Thanksgiving Holiday**
December 19 ..... *Second Grading Period Ends*
December 22 - January 2 ..... **Winter Break**
January 5 ..... **Student Holiday/Staff Professional Learning Day**
January 6 ..... *Second Semester Begins*
January 19 ..... **Martin Luther King Jr. Day Holiday**
February 16 ..... **Student Holiday/Staff Professional Learning Day**
March 13 ..... *Third Grading Period Ends*
March 16-20 ..... **Spring Break**
April 3 ..... **Make-Up Day**
April 6 ..... **Make-Up Day**
May 22 ..... *Fourth Grading Period Ends/Last Day of School*
May 25 ..... **Memorial Day Holiday**

CALENDAR SYMBOLS KEY

Student and Staff Holiday
Student Holiday/Staff Professional Learning Day
Student Holiday/Staff Exchange Day
❄ Make-Up Day (if needed, subject to change)
Early Release
Grading Period Ends

Block schedule for secondary schools is indicated by the small letter beside the calendar date.

SCHOOL HOURS

Pre-K Programs	Check with home campus
Dobie Pre-K	7:30 a.m. - 2:50 p.m.
Elementary	7:50 a.m. - 3:10 p.m.
Junior High	8:15 a.m. - 3:40 p.m.
High School	9 a.m. - 4:20 p.m.

Early release dismissal is two hours ahead of normal dismissal time.

Considerations for Option **A1** Calendar 2025-2026

Topic	Date	Note
Student Start Date	August 12	Tuesday
Staff PD/Student Holiday	Oct 10 Nov 3 Nov 4 Jan 5 Feb 16	 Day Before Election Day Election Day
Student Holiday/Staff Exchange Day	Nov 24 Nov 25 Nov 26	Thanksgiving Week Thanksgiving Week Thanksgiving Week
First Semester Ends	Dec 19	84 Days in 1st Semester
Winter Break	Dec 22 - Jan 2	
Second Semester Begins	Jan 6	
Spring Break	Mar 16 - Mar 20	
Make Up Days if needed	Apr 3 May 1	Good Friday
Last Student Day	May 22	90 Days in 2nd Semester
Student & Staff Holidays		
	Sep 1 Oct 13 Nov 27-28 Dec 22-31 Jan 1-2 Jan 1 Jan 19 Mar 16-20 May 25	Labor Day Fair Day Thanksgiving Winter Break Winter Break New Year's Day MLK Spring Break Memorial Day

1st Nine Weeks – 42 Days
2nd Nine Weeks – 42 Days

ACADEMIC CALENDAR "Option A1" for 2025 - 2026 SCHOOL YEAR

3rd Nine Weeks – 42 Days
4th Nine Weeks – 48 Days

JULY

MON	TUES	WED	THRS	FRI
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SEPTEMBER

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NOVEMBER

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DECEMBER

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JANUARY

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FEBRUARY

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MARCH

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APRIL

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MAY

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H Holidays
• Records Day
[School Semester Begins
] School Semester Ends
Z Staff Development Earned Off Duty
** Make-Up Days (If needed)
X Staff Development
Y New Teacher Days
(Beginning of Nine Weeks
) End of Nine Weeks

Considerations for Option **B2** Calendar 2025-2026

Topic	Date	Note
Student Start Date	August 12	Tuesday
Staff PD/Student Holiday	Nov 3 Nov 4 Jan 5 Feb 16	Day Before Election Day Election Day
Student Holiday/Staff Exchange Day	Nov 24 Nov 25 Nov 26	Thanksgiving Week Thanksgiving Week Thanksgiving Week
First Semester Ends	Dec 19	84 Days in 1st Semester
Winter Break	Dec 22 - Jan 2	
Second Semester Begins	Jan 6	
Spring Break	Mar 16 - Mar 20	
Make Up Days if needed	Apr 3 April 6	Good Friday
Last Student Day	May 22	90 Days in 2nd Semester
Student & Staff Holidays		
	Sep 1 Oct 10 Oct 13 Nov 27-28 Dec 22-31 Jan 1-2 Jan 1 Jan 19 Mar 16-20 May 25	Labor Day Fall Holiday Fair Day Thanksgiving Winter Break Winter Break New Year's Day MLK Spring Break Memorial Day

1st Nine Weeks – 42 Days
2nd Nine Weeks – 42 Days

ACADEMIC CALENDAR "Option B2" for 2025 - 2026 SCHOOL YEAR

3rd Nine Weeks – 47 Days
4th Nine Weeks – 43 Days

JULY

MON	TUES	WED	THRS	FRI
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AUGUST

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SEPTEMBER

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OCTOBER

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NOVEMBER

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DECEMBER

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JANUARY

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FEBRUARY

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MARCH

MON	TUES	WED	THRS	FRI
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APRIL

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MAY

MON	TUES	WED	THRS	FRI
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JUNE

MON	TUES	WED	THRS	FRI
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22	23	24	25	26
29	30			

H Holidays
• Records Day
[School Semester Begins
] School Semester Ends
Z Staff Development Earned Off Duty
** Make-Up Days (If needed)
X Staff Development
Y New Teacher Days
(Beginning of Nine Weeks
) End of Nine Weeks

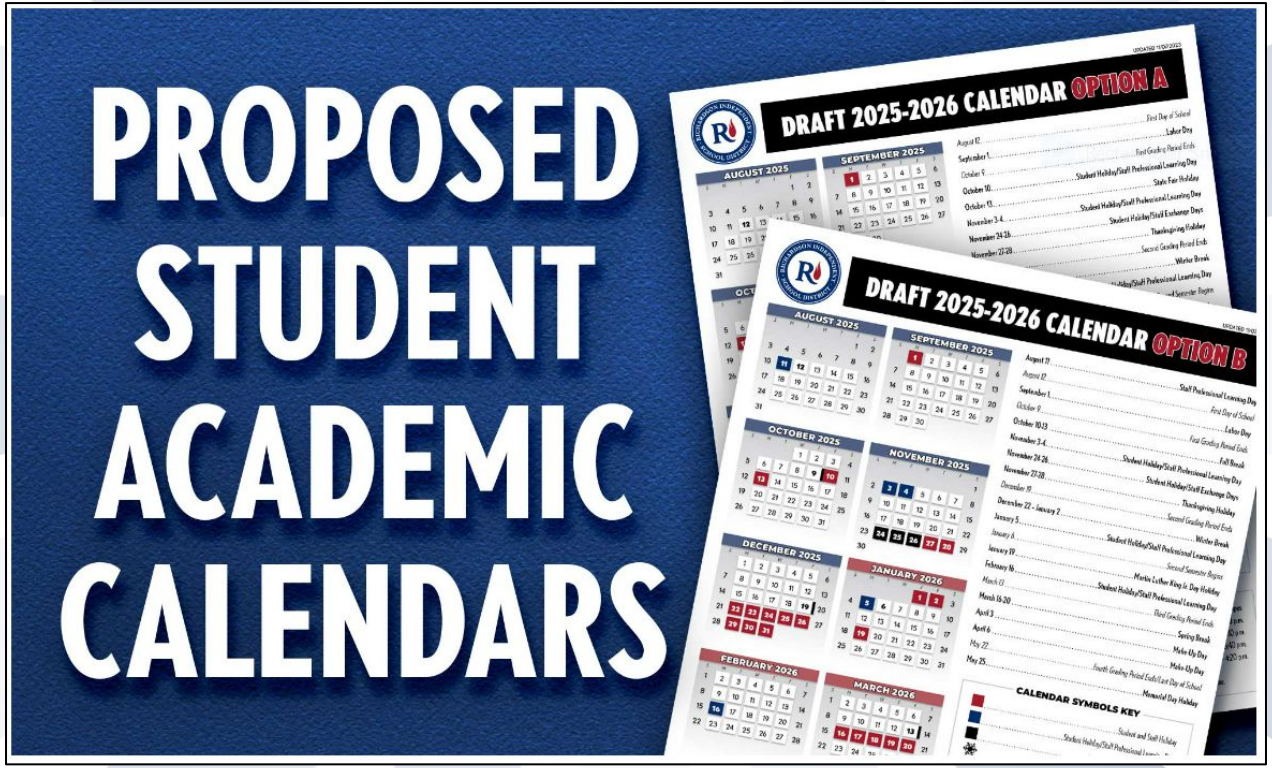
2025-26 Calendar- RISD Calendar Committee

Mike Jasso | February 22, 2024

RICHARDSON ISD'S NORTH STAR GOAL

Every student, teacher, and leader will meet or exceed their academic growth goals.

Staff & Community Feedback: Let's Talk
January 19- February 15



Recommended 2025-26 Calendar

Option B

Option B

Topic	Date	Note
Student Start Date	August 12	Tuesday
Staff PD/Student Holiday	Nov 3 Nov 4 Jan 5 Feb 16	Day Before Election Day Election Day
Student Holiday/Staff Exchange Day	Aug. 4 Nov 24 Nov 25 Nov 26	Before Classes Begin Thanksgiving Week Thanksgiving Week Thanksgiving Week
First Semester Ends	Dec 19	84 Days in 1st Semester
Winter Break	Dec 22 - Jan 2	
Second Semester Begins	Jan 6	
Spring Break	Mar 16 - Mar 20	
Make Up Days if needed	Apr 3 April 6	Good Friday
Last Student Day	May 22	90 Days in 2nd Semester
Student & Staff Holidays		
	Sep 1 Oct 10 Oct 13 Nov 27-28 Dec 22-31 Jan 1-2 Jan 1 Jan 19 Mar 16-20 May 25	Labor Day Fall Holiday Fair Day Thanksgiving Winter Break Winter Break New Year's Day MLK Spring Break Memorial Day

Questions?

RICHARDSON ISD'S NORTH STAR GOAL

Every student, teacher, and leader will meet or exceed their academic growth goals.

RESOLUTION
OF THE
BOARD OF TRUSTEES OF THE RICHARDSON INDEPENDENT SCHOOL DISTRICT
TO ENCOURAGE PARTICIPATION IN THE ELECTION PROCESS

WHEREAS, public education and the educated citizenry created by public education are the greatest safeguards to the State of Texas and the continuation of a free society; and the institution of public education is best protected by a robust and informed electorate; and

WHEREAS, exercising one's right to vote is a civic duty that should be encouraged and promoted; and

WHEREAS, the Board of Trustees of Richardson Independent School District seeks to create a culture of voting and encourage all District employees to model responsible citizenship for the benefit of students; and

WHEREAS, creating a culture of voting and participation in the electoral process supports the Board's mission, beliefs, strategic objectives, and strategies; and

WHEREAS, sections 276.001 and 276.004 of the Texas Election Code protect an employee's right to vote; and

WHEREAS, section 13.046(d) of the Texas Election Code supports efforts to encourage participation in the voting process by requiring the District to distribute an officially prescribed registration application to each student who is or will be 18 years of age or older during that year; and

WHEREAS, the Texas Education Code seeks to encourage and educate public school students on the importance of democracy and civic responsibility through the Texas Essential Knowledge and Skills (TEKS) for Social Studies;

WHEREAS, the Board of Trustees is mindful that public funds or resources may not be used for political advertising and nothing herein shall be construed to authorize the use of public funds or resources for political advertising;

NOW THEREFORE BE IT RESOLVED, that the Board of Trustees of the Richardson Independent School District –

- adopts each statement in the Preamble above;
- supports a culture of voting and seeks to encourage maximum participation by District employees and eligible students in the election process;
- authorizes the administration to take further steps to encourage maximum participation by District employees and eligible students in the election process, which may include (without limitation):
    - creating and distributing District communications that promote and inform employees and eligible students of the importance of voting;
    - creating and distributing District communications that inform employees and eligible students about when and where they may vote;

- creating and distributing District communications that encourage employees and eligible students to learn about candidates' positions on public education;
- implementing administrative procedures that provide time during the early voting period for employees to vote; and
- encouraging District and campus coordination with volunteer community and civic organizations, such as the PTA, Chamber of Commerce, and retired educators' groups, to encourage and facilitate the District's efforts to promote a culture of voting;

ADOPTED by the Board of Trustees of the Richardson Independent School District on this 22day of February, 2024.

By: _____
Name: Regina Harris
Title: President, Board of Trustees

Attest:

By: _____
Name: Chris Poteet
Title: Secretary, Board of Trustees

BOARD OF TRUSTEES
Richardson Independent School District
Richardson, Texas

Date: February 22, 2024

Submitted by: David Pate, Assistant Superintendent of Finance and Support Services
Christopher B. Goodson, Ed. D., Assistant Superintendent of Human Resources

INFORMATION ITEM

TOPIC: **Salary and Compensation Update**

BACKGROUND INFORMATION

The Texas Education Code and the Texas Education Agency Financial Accountability System Resource Guide requires the district to prepare and adopt a budget prior to the start of the new fiscal year.

The budget process begins each July and culminates in June with the Board of Trustees adopting the budget.

Employee compensation is the largest category of expenditures in the district's budget. The administration has prepared a presentation regarding current employee compensation and benefits.

The primary purpose of the presentation is to set a establish a baseline for compensation discussions in the 2024-25 budget process.

SUPERINTENDENT'S RECOMMENDATION

The Superintendent presents the information regarding the 2024-25 Budget Discussion for the Board's Information and review.

Salary and Compensation Plan Review and Discussion

February 22, 2024

RICHARDSON ISD'S NORTH STAR GOAL

Every student, teacher, and leader will meet or exceed their academic growth goals.

Agenda

- Education Job Market Outlook and Context
- Impact of lack of action from legislature in the 88th session to increase basic allotment
- Review 2023-2024 compensation and benefits plan
- Discuss compensation considerations for 2024-2025

RICHARDSON ISD'S NORTH STAR GOAL

Every student, teacher, and leader will meet or exceed their academic growth goals.

EVERY CHILD. EVERY TEACHER. EVERY LEADER. EVERY DAY.

2

RISD - Business Profile

- One of the largest employers in Dallas County and the second largest in the City of Richardson
- Education is a significant industry for our local economy
- Logistics and operations for 37,000 students
- Employing 5,790 overall staff (PEIMS Snapshot)
  - 2,758 Teachers
  - 1,612 Aides/Support Staff
  - 1,420 Auxiliary (Cafeteria, Facilities)
- Transportation - 175 buses traveling over 1.4 million miles

What we do as a business to support our employees has a direct impact on students and their experience in our schools

RICHARDSON ISD'S NORTH STAR GOAL

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EVERY CHILD. EVERY TEACHER. EVERY LEADER. EVERY DAY.

The Changing Job Market

- The Great Resignation or The Great Re-Shuffling?
- During 2021, Gallup asked employees why they left their employer and what would attract them to a new employer. While pay and benefits were top reasons employees gave for leaving, only 14% of respondents mentioned them.
- About 75% of the top reasons employees gave were related to:
  - Employee engagement and culture
  - Advanced and development opportunities
  - Not being treated with respect
  - Unrealistic job expectations and responsibilities
  - Well-being, relocation, work-life balance, personal reasons, work schedule

Soutvrz; 2023 Gallup Press: Culture Shock by Clifton and Harter

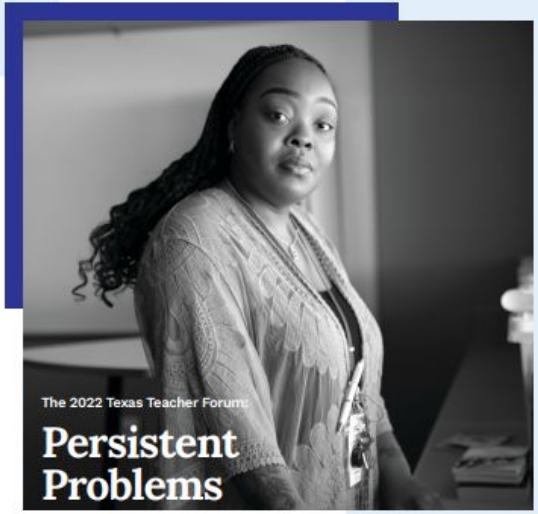
RISD 2023 Benefits Survey

- Depending on years of services no less than 88.8% of employees prioritized better compensation over better benefits
- 75.8% of respondents preferred a higher base salary over other compensation options
- Benefit preferences varied by years of experience
  - Veteran employees (retirement contributions, compensation for unused leave days)
  - Mid-range employees (compensation for unused leave days, lower health insurance premiums)
  - Newer employees (paid leave options)

2022 Texas Teacher Poll by the Charles Butt Foundation confirms challenges for the education industry:

The survey of a random sample of Texas public school teachers finds that 77% have seriously considered leaving the profession, up 19 percentage points in two years.

- Pay is a major factor: 81% of Texas teachers say their pay is unfair, up 12 points in a year.
- 41% report working an additional job out of financial need, in most cases during the school year.
- Additionally, more than 80% of teachers see insufficient planning time, non-instructional responsibilities, and high-stakes testing as obstacles to their effectiveness.



Important to Address

The overall picture that impacts employee recruitment and retention:

- Employee Well-Being & Compensation

As an organization we are working to prioritize both of these and advocate for addressing the burnout and stress that is impacting our industry.

RICHARDSON ISD'S
NORTH STAR GOAL

Every student, teacher and leader will meet or exceed their academic growth goals.

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8

Prioritizing Employee Well-Being

Addressing areas that impact employee well-being:

- Culture - Creating a culture of recognition, celebration
- Wellness - Employee health clinic with Richardson Methodist and TAMC mental health services
- Connection - family atmosphere of campuses and departments
- Communication - Tab's Monday Message to staff
- For organizations where employees must be on-site, how do you provide flexibility?
    - 3 early release days each semester
    - 5 professional learning days during the school year
    - More flexibility in dress code

Employee Compensation

When it comes to addressing employee compensation:

- Legislature took no action to increase the basic allotment
- The basic allotment is what provides the funding for raises for staff
- From the Community Budget Steering Committee Charge adopted June 8, 2023: "to address the unprecedented financial challenges associated with declining revenue and increased operating costs resulting from: Lack of legislative investment in public education, as evidenced by not increasing the basic allotment since 2019"

Strategic Plan

Goal 2: Staff Recruitment & Retention

RISD will reimagine the way we recruit and retain quality staff through comprehensive strategies.

Goal 5: Financial Stewardship

The school district will increase efficiency and effectiveness in operations and personnel and seek additional fiscal resources to accomplish the Call to Action

RICHARDSON ISD'S NORTH STAR GOAL

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Strategic Compensation

Innovation Compensation Strategy (supported by HB3 funding):

- National Board Certification (7)
- Teacher Incentive Allotment
  - 2021-2022 - **7** designated teachers (local designation)
  - 2022-2023 - **40** designated teachers (local designation)
  - 2023-2024 - **TBD** designated teachers (local designation)
  - 2024-2025 - (adding JH and additional elementary schools)

Review compensation package Board approved in May 2023 for the 2023-24 school year

Compensation Package

Components of the compensation package:

- Salary
- Stipends
- Benefits
- Local Leave Days
  - Maternity/Paternity Leave
  - Bereavement Leave

Staff Raise Adopted May 4, 2023

New Teacher Starting Salary ($57,000 – 22-23)	$60,000
T-type 1-4 years	5.75%
T-type 5-9 years	7.00%
T-type 10-15 years	7.50%
T-type 16+ years	8.00%
Custodians (Current starting salary $10.50/hr)	$3.00 Per Hour
Electricians, HVAC, Plumbers	6.00%
Sped Para's (Current starting salary $21,632 or $14.46/hr)	6.00%
Non-T Exempt	3.00%
Non-T Non-exempt	4.00%

RICHARDSON ISD'S NORTH STAR GOAL

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RISD Compensation Package 2023-2024

Stipends – Professional Staff

- Bilingual Classroom Teacher - $6,000
- Resource Spec. Educ. - $2,000
- Central Spec. Educ. - $4,000
- Secondary Core Subjects up to $2,000
- CTE Critical Need - $3,000

RISD Employee Clinic

- Non-emergency care to RISD Employees and immediate family
- $10 copay regardless of insurance
- Virtual visits available

RISD Employee Daycare/Child Learning Academy

- Private, high-quality, licensed daycare
- Little Eagles site opening Fall 2023
  - ***Little Mustangs site expected January 2024***
- $350/month ***(Approx. $7,500 savings compared to non-RISD provider)***

RISD Employee PK

- High-quality RISD Pre-K available in most elementary schools
- $150/month ***(Approx. $8,700 annual savings compared to non-RISD provider)***

23-24 Benefit Expansion

- Include Maternity/Paternity Leave as allowable use of Sick Leave Bank and Hardship days
- Allow 3 Sick Leave Bank days to be used for bereavement

RICHARDSON ISD'S NORTH STAR GOAL

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Value of Expanded Benefits (2023-2024)

- Employees have saved approximately $40,000 by taking advantage of expanded access to Sick Leave Bank days.
- Employees have saved approximately $9,000 by taking advantage of Little Eagles/Little Mustangs Learning Academies
- Approximately 1,200 patients served in health clinic
- Approximately 85 patients served in mental health clinic *(Apr. - Dec.)*

Health Insurance Contribution Comparison

District	Health Insurance Contribution	Insurance Provider
Irving	$400	TRS
Carrollton-Farmers Branch	$350	TRS
Frisco	$350	TRS
Allen	$340	TRS
Plano	$330	TRS
Garland	$325	TRS
Arlington	$317/$332	TRS
Richardson	$313	TRS
McKinney	$306	TRS
Mesquite	$300	Self Funded
Wylie	$275	TRS
Hurset Euless Bedford	$225	TRS

55% of RISD employees participate in the Districts health insurance.

Arlington contributes $266 for professional staff/$281 for support staff plus an additional $51 if an employee participates in the wellness program.

Where are we in comparison to other districts?

Teacher Pay Comparison-New Hire Salaries

	Year 0	Year 5	Year 10	Year 15	Year 20	Year 25
Denton	59,340	61,079	63,510	65,776	67,630	69,278
Allen	59,500	61,039	64,427	65,821	67,579	69,305
Richardson	60,000	61,375	62,750	64,125	65,500	66,775
Plano	60,000	61,750	63,500	65,250	67,000	68,750
Lewisville	60,850	62,914	64,900	68,040	69,687	71,641
Garland	61,000	62,835	65,428	68,118	69,739	71,438
Grand Prairie	62,100	62,725	63,622	68,131	69,940	71,916
Arlington	62,500	65,000	67,500	70,000	72,500	74,700

RICHARDSON ISD'S NORTH STAR GOAL

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Considerations for 2024-2025

ALL STAFF Salary Increase Estimates for 2024-2025

Salary Increase	District Cost*
1%	$3.2M
2%	$6.4M
3%	$9.5M
4%	$12.7M

*Raise calculated for filled General Fund positions. No increase in starting pay has been calculated.

RICHARDSON ISD'S NORTH STAR GOAL

Every student, teacher, and leader will meet or exceed their academic growth goals.

EVERY CHILD. EVERY TEACHER. EVERY LEADER. EVERY DAY.

Budget Calendar

- February 22, 2024 – Board of Trustee Meeting: Demographic Report, Budget Presentation
- February 23, 2024 – Campus and Department budget worksheets due to budget office
- February 23, 2024 – Cabinet member special requests due to budget office
- February 28, 2024 – Receive update from Dallas Central Appraisal District (tentative)
- March 7, 2024 – Board of Trustee Meeting: Budget presentation
- April 4, 2024 – Board of Trustee Meeting: Budget presentation
- April 18, 2024 – Board of Trustee Work Session: Budget presentation
- April 30, 2024 – Last day to receive estimated certified value from Dallas Central Appraisal District

Budget Calendar

- May 2, 2024 – Board of Trustee Meeting: Budget presentation, 23-24 Compensation Plan Approval
- May 16, 2024 – Board of Trustee Work Session: Budget presentation
- May 25, 2024 – Publish notice of hearing to adopt budget and tax rate (no less than 10 and no more than 30 days prior to hearing)
- June 6, 2024 – Board of Trustee Meeting: Conduct public hearing on budget and tax rate, and adopt budget
- July 25, 2025 – Last day to receive certified value from Dallas Central Appraisal District
- August 1, 2024 – Last day to Provide Certified Value to Texas Education Agency
- August 5, 2024 – Last for Texas Education Agency to Provide Maximum Compressed Tax Rate
- August 24, 2024 – Publish notice of hearing on tax rate (no less than 10 and no more than 30 days prior to hearing), if necessary
- September 5, 2024 – Board of Trustee Work Session: Adopt tax rate
- October 1, 2024 – Mail tax bills with adopted rate

Questions

BOARD OF TRUSTEES
Richardson Independent School District
Richardson, Texas

Date: February 22, 2024

Submitted by: Tabitha Branum, Superintendent

INFORMATION ITEM

TOPIC: **Recommended Budget Reductions: Project Rightsize**

BACKGROUND INFORMATION

In December, the Community Budget Steering Committee presented a series of recommendations to effectively “right-size” the budget to ensure:

- The District’s ability to recruit and retain the best educators and staff to serve 37,000 RISD students;
- Maintain the level of supports and resources to improve student academic achievement;
- Continue to invest in the student programming and supports to ensure ALL students reach their growth goals.

The Administration Team will provide an update on the budget planning and recommendations for the Board’s consideration and feedback.

PROJECT RIGHTSIZE

February 22, 2024

Richardson Independent School District

NORTH STAR GOAL

Every student, teacher and leader will meet or exceed their individual academic growth goal.

OUR OBJECTIVE:

- Ensure our limited budget resources are used to prioritize compensation of talent
- Maintain student programming to support student academic outcomes
- Provide the resources necessary to support our staff in achieving the North Star Goal

FORT WORTH ISD

Fort Worth ISD releases more details on layoffs impacting district

The district has announced which jobs and how many will be affected

By Alanna Quillen • Published February 16, 2024 • Updated on February 16, 2024 at 2:47 pm

Irving ISD Board Approves Measures to Rebalance Enrollment, Prevent Budget Shortfall

Posted by Irving ISD | Dec 18, 2023 | News Briefs | 0 |

Allen ISD school officials projecting a deficit budget for 2023-24

By Winston Henvey / Star Local Media
Jun 11, 2023

DALLAS - FORT WORTH / PLANO / EDUCATION

Rising costs driven by market trends, inflation, expected to impact Plano ISD budget

By Teri Webster | 1:57 PM Apr 24, 2023 CDT
Updated 1:57 PM Apr 24, 2023 CDT

Plano ISD may close school buildings, restructure campuses as enrollment dips

KERA | By Toluwani Osibamowo
Published November 14, 2023 at 5:00 AM CST

Frisco ISD proposes a second deficit budget citing lack of increased revenue from Texas Legislature

By Audrey Henvey | Star Local Media
Jun 9, 2023

'A tenuous situation:' A look into Beaumont ISD's budget challenges

Olivia Malick, Staff writer
June 10, 2023

Austin ISD school board approves deficit budget as recapture payment nears $1 billion

KUT 90.5 | By Becky Fogel
Published June 23, 2023 at 9:54 AM CDT

Jul 19, 2023 - Education

San Antonio ISD to close and consolidate schools by 2024

Madalyn Mendoza

McAllen ISD eyes belt-tightening with little wiggle room in the budget

By Matt Wilson - June 17, 2023

Financial Challenges

Declining Enrollment
Due to declining birth rates and other factors

Pressure to Increase Wages
Salary increases necessary to remain competitive with local benchmark districts

Lack of Legislative Funding
No increase in the basic allotment since 2019

Competition for Staff Talent
Below benchmark, competitive salaries

Record Inflation
18% increase in Consumer Price Index since March 2020
25% increase in property insurance ($900,000)

Inefficient Operation
Staffing models not systematized, elementary school model least efficient among comparison districts

Budget Forecast

RISD is currently projecting a **significant deficit** (estimated ($28,490,571) in next year's 2024-25 operating budget.

As part of the 2023-24 budget adoption process in June 2023, RISD Trustees commissioned a **COMMUNITY BUDGET STEERING COMMITTEE (CBSC)**.

The CBSC was charged with studying RISD's financial situation and arriving at **recommendations** for RISD Trustees to consider as part of the 2024-25 budget process.

General Fund Multi Year Forecast

Parameter	FY 23-24 Estimate	FY 24-25 Estimate	FY 25-26 Estimate	FY 26-27 Estimate	FY 27-28 Estimate
Total Revenue	$402,969,329	$399,493,951	$391,101,337	$383,292,122	$375,633,720
Recurring Cost	$419,265,543	$418,460,109	$431,278,417	$444,484,340	$458,096,498
Raise 3%	-	$9,524,413	$9,810,145	$10,104,450	$10,407,583
ESSER Supplanting	($16,427,785)	-	-	-	-
Total Expenditures	$402,837,758	$427,984,522	$441,088,562	$454,588,790	$468,504,081
Change in Fund Balance	$131,571	($28,490,571)	($49,987,225)	($71,296,668)	($92,870,361)
Ending Fund Balance	$179,316,923	$150,826,352	$100,839,127	$29,542,459	($63,327,902)
% Total FB to Total Expenditure	45%	35%	23%	7%	(14%)
90 Days of Expenditures	$99,149,682	$106,746,131	$110,022,141	$113,397,179	$116,876,020

Summary of CBSC Recommendations

1. Reduce Central Expenditures 5-7%
2. Standard Rubric for Reductions
3. Consolidate Elementaries
4. Expand Inter-District Transfer Options
5. VATRE
6. Expand *xPlore!* Enrollment
7. Choice Programming
8. Standard Staffing Model
9. Strategic Compensation

Summary of CBSC Recommendations

1. **Reduce Central Expenditures 5-7%**
2. **Standard Rubric for Reductions**
3. **Consolidate Elementaries**
4. **Expand Inter-District Transfer Options**
5. **VATRE**
6. **Expand *xPlore!* Enrollment**
7. **Choice Programming**
8. **Standard Staffing Model**
9. **Strategic Compensation**

8 Standard Staffing Model

1 Reduce Central Expenditures 5-7%

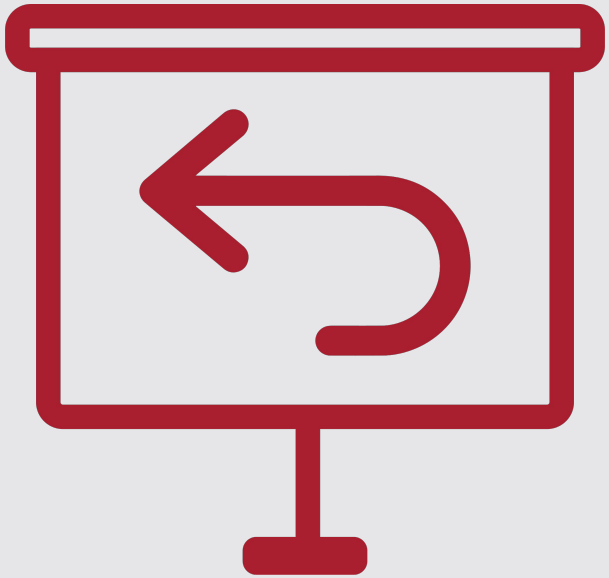
2 Standard Rubric for Reductions

3 Consolidate Elementaries

Standard Staffing Model

REFER BACK:

Salary and Compensation information item shared in the previous presentation.



8 Standard Staffing Model

1 **Reduce Central Expenditures 5-7%**

2 Standard Rubric for Reductions

3 Consolidate Elementaries

Percent of Budget for Central Administration and Support

District	Budget Percentage
Dallas ISD	23.17%
Rockwall ISD	22.52%
Mesquite ISD	21.40%
C-FB ISD	19.77%
Allen ISD	19.77%
McKinney ISD	19.02%
Garland ISD	17.49%
Plano ISD	16.68%
Frisco ISD	16.19%
Richardson ISD	**15.49%**

8 Standard Staffing Model

1 **Reduce Central Expenditures 5-7%**

2 Standard Rubric for Reductions

3 Consolidate Elementaries

2024-25 Central Budget Reductions as of February 22, 2024

- **$14.4 million** already cut in 23-24 central/support budgets.
- Departments reporting to the following Cabinet members have been reviewed:
  - Dr. Melissa Heller, Assistant Superintendent of Strategy & Engagement
  - Mike Jasso, Chief of Staff
  - Dr. Kristin Leeper, Assistant Superintendent of Teaching & Learning
  - David Pate, Assistant Superintendent of Finance & Support Services
- Reductions of **$1,055,000** have been identified to date.
- Target is **$2,000,000.**
- Remaining budget reviews expected to be completed by **March 4.**

8 Standard Staffing Model

1 Reduce Central Expenditures 5-7%

2 **Standard Rubric for Reductions**

3 Consolidate Elementaries

Project Rightsize Decision-Making Criteria

Central expenditure reductions:

- Impact on student safety
- Campus infrastructure and core services
- Legal compliance
- Impact on teaching and learning (Strategic Plan and Graduate Profile)

School consolidation considerations:

- Age of campus
- Quality of learning environment
- Geographic proximity to other campuses
- Commitment to Learning Community
- Equitable options across learning communities

8 Standard Staffing Model

1 Reduce Central Expenditures 5-7%

2 Standard Rubric for Reductions

3 **Consolidate Elementaries**

Elementary (Pre-K - 5) Size Comparison

Average Pre-K-5 Elementary: **546**

District	Number of Schools	20-21 Enrollment	20-21 Average Size
Klein ISD	32	22,285	696
Humble ISD	29	19,871	685
Alvin ISD	19	12,298	647
Frisco ISD	42	26,905	641
Lamar CISD	27	16,919	627
Wylie ISD (Collin County)	11	6,609	601
Spring Branch ISD	25	14,442	578
Pflugerville ISD	20	11,490	575
Denton ISD	24	13,287	554
Ector County ISD	28	15,380	549
Lewisville ISD	39	20,331	521
Allen ISD	18	9,203	511
Mansfield ISD	23	11,703	509
Mesquite ISD	33	16,652	505
C-FB ISD	24	12,066	503
Garland ISD	47	23,119	492
Rockwall ISD	15	7,266	484
Plano ISD	44	20,986	477
Mckinney ISD	20	9,434	472
Midland ISD	27	12,640	468
Dallas ISD	152	70,716	465
Richardson ISD *(excludes grade 6)*	**40**	**18,201**	**455**

8 Standard Staffing Model

1 Reduce Central Expenditures 5-7%

2 Standard Rubric for Reductions

3 **Consolidate Elementaries**

2023-24 Elementary School Utilization

School	Building Utilization
Aikin	65%
Arapaho Classical	81%
Audelia Creek	67%
Big Springs	61%
Bowie	76%
Brentfield	82%
Canyon Creek	72%
Bukhair	74%
Dartmouth	65%
Dover	58%
Forest Lane Academy	63%
Forestridge	69%
Greenwood Hills	59%
Hamilton Park	64%
Jess Harben	76%
Lake Highlands	86%
Mark Twain	61%
MST Magnet	66%
Merriman Park	74%
Mohawk	72%

School	Building Utilization
Moss Haven	71%
Northlake	94%
Northrich	49%
Northwood Hills	54%
O. Henry	79%
Prairie Creek	61%
Prestonwood	87%
Richardson Heights	66%
Richardson Terrace	79%
Richland	71%
RISD Academy	66%
Skyview	71%
Spring Creek	72%
Spring Valley	56%
Springridge	59%
Stults	65%
Thurgood Marshall	59%
Wallace	65%
White Rock	84%
Yale	56%

WALKING THROUGH THE PROJECT RIGHTSIZE PLAN

For the remainder of the presentation, refer to the Project RightSize plan booklet for more detailed information.

Page number references will be listed to the right.

Scan here for the Project RightSize plan booklet, or visit www.risd.org/budget for a direct link.

PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S)

1

COMMITMENT STATEMENT

RISD is committed to standing by our families and employees and supporting them through the changes and transitions in this plan. We believe this can be achieved by honoring the following commitments:

Communicating with our stakeholders in a clear, transparent, and timely manner.

Remaining focused on the academic growth of all students and programs to support student growth and development.

Honoring the legacy and history of our impacted campuses and facilities.

Ensuring equity of consolidations and resources across RISD's four learning communities.

Prioritizing the placement of students and employees impacted by Project RightSize.

PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S)

2

OUR GUIDING PRINCIPLES

The goal of Project RightSize is to stay focused on the district's North Star Goal while also honoring the district's vision and beliefs.

EVERY CHILD. EVERY TEACHER. EVERY LEADER. EVERY DAY.

North Star Goal

Call to Action

Beliefs

Strategic Plan

PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S)

3

→ FACTORS CONSIDERED

- → Excess classroom capacity
- → Enrollment trends and projected enrollment decline
- → Enrollment among residents within existing neighborhood attendance boundaries
- → Building ages and conditions
- → Academic opportunities
- → Natural combinations of attendance zones
- → Students being able to walk/bike to school
- → Maintaining feeder patterns
- → Bus routes and transportation costs
- → Central programs like special education and bilingual classes
- → Demographic makeup of schools to ensure consistent engagement and support opportunities among consolidated and partnering campuses.

PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S)

4-5

→ PLAN SUMMARY

Greenwood Hills Elementary, Springridge Elementary, Spring Valley Elementary, and Thurgood Marshall Elementary to be consolidated or repurposed with partnering elementary schools beginning with the 2024-25 school year.

Dobie Pre-Kindergarten School to be repurposed in 2025-26.

PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S)

7

→ RATIONALE

- → Equity across district.
- → Utilization of space.
- → Current and projected enrollment.
- → Age and condition of buildings.
- → Location and fit for central programs.
- → Natural combinations of attendance boundaries.
- → Reducing overall need to bus students.
- → Preserving learning communities.

→ BENEFITS

- → Projected savings of $10.8 million.
- → Estimated one-time increase of $10 million.
- → Elementary model reflects enrollment.
- → More efficient elementary utilization (elimination of ≈4,600 seats).
- → Estimated savings of $300,000 in transportation costs.
- → Additional pre-K classrooms.

PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S)

7

GREENWOOD HILLS ELEMENTARY

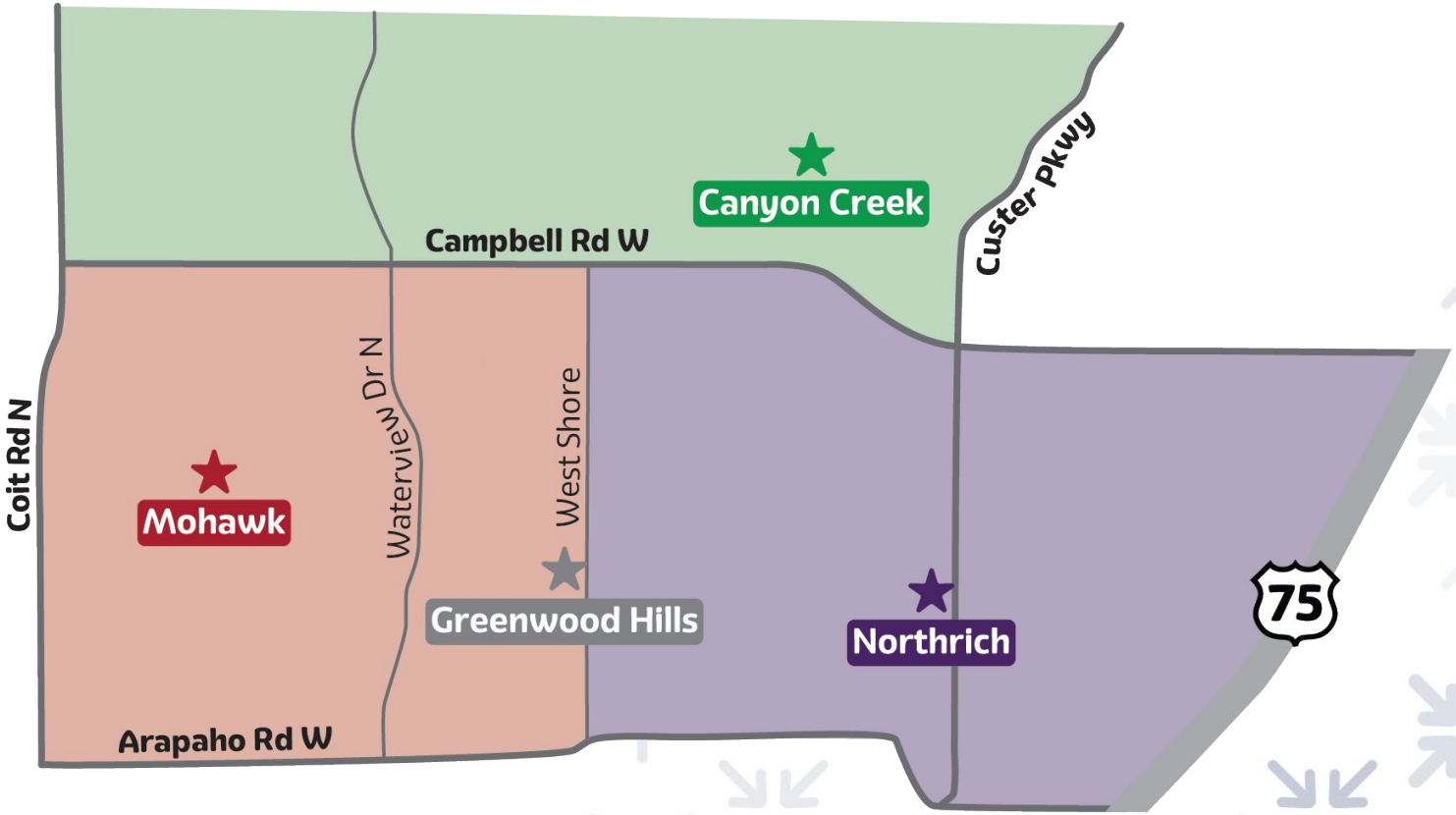
2023-24 Enrollment: 418 Students

Impacts: Mohawk, Northrich, Canyon Creek, and Dover

- → Greenwood Hills is currently utilizing 59% of the building's capacity.
- → Enrollment has declined and is projected to further decline over the next five years.
- → The building is older with higher facility needs per the RISD Facility Condition Index (FCI).

PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S) 8-9



PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S)

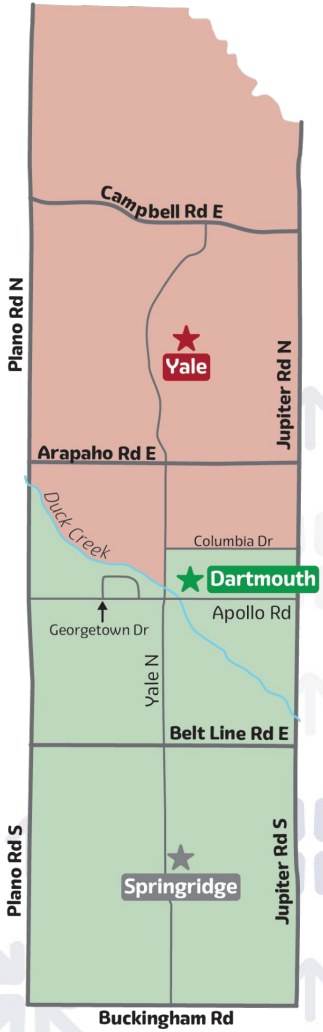
8-9

SPRINGRIDGE ELEMENTARY

2023-24 Enrollment: 275 Students

Impacts: Dartmouth, Forestridge, Yale, and Little Rams/Wildcat Child Learning Academy

- → Springridge is currently utilizing 59% of the building's capacity.
- → Enrollment has declined and is projected to further decline over the next five years.
- → The building is older with higher facility needs per the RISD Facility Condition Index (FCI).



PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S) 10-11

SPRING VALLEY ELEMENTARY

2023-24 Enrollment: 368 Students

Impacts: Northwood Hills, Hamilton Park Pacesetter Magnet, Professional Development Center

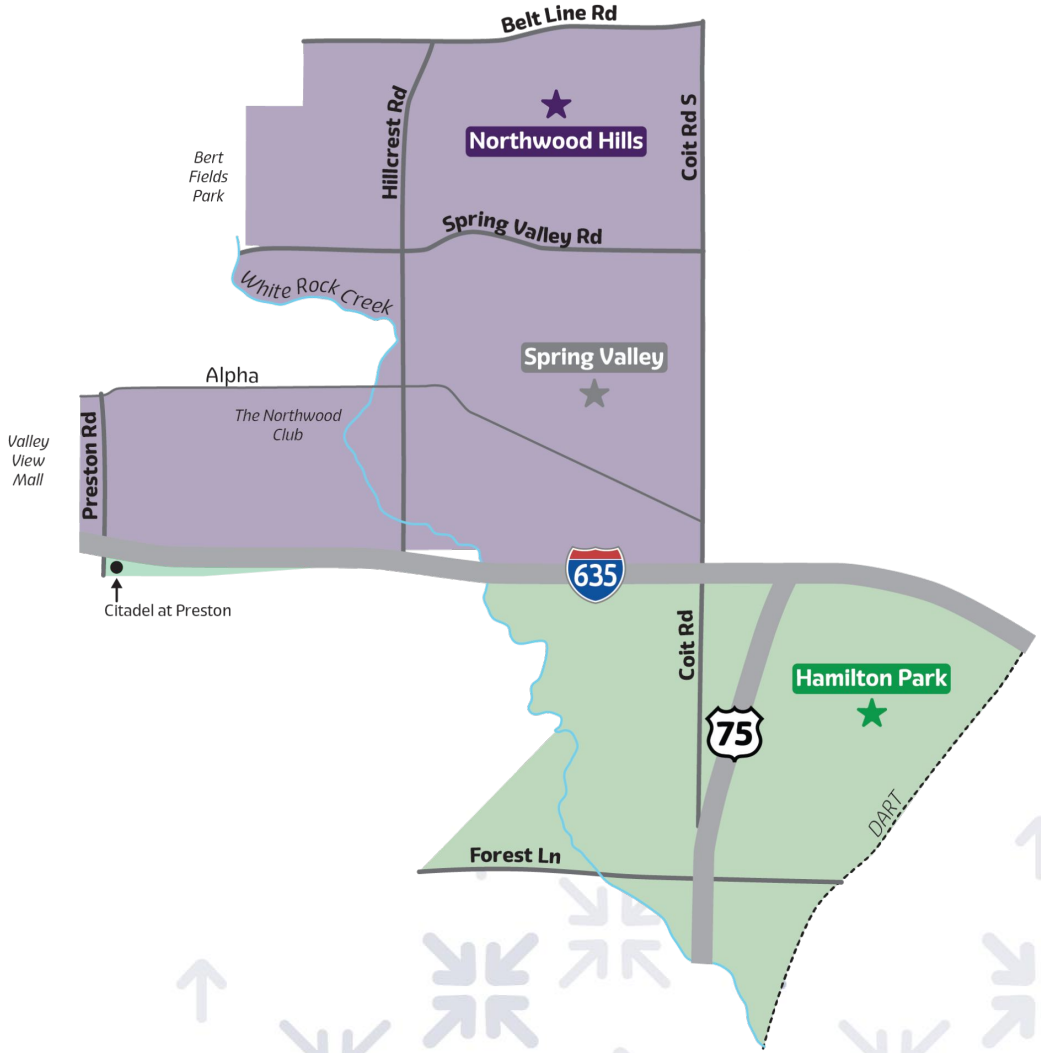
→ Spring Valley is currently utilizing 56% of the building's capacity.

→ Enrollment has declined and is projected to further decline over the next five years.

→ The building is 55 years old and in fair condition per the RISD Facility Condition Index (FCI).

PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S) 12-13



PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S)

12-13

THURGOOD MARSHALL ELEMENTARY

2023-24 Enrollment: 497 Students

Impacts: Audelia Creek, Forest Lane Academy, Forestridge, Northlake, and Skyview

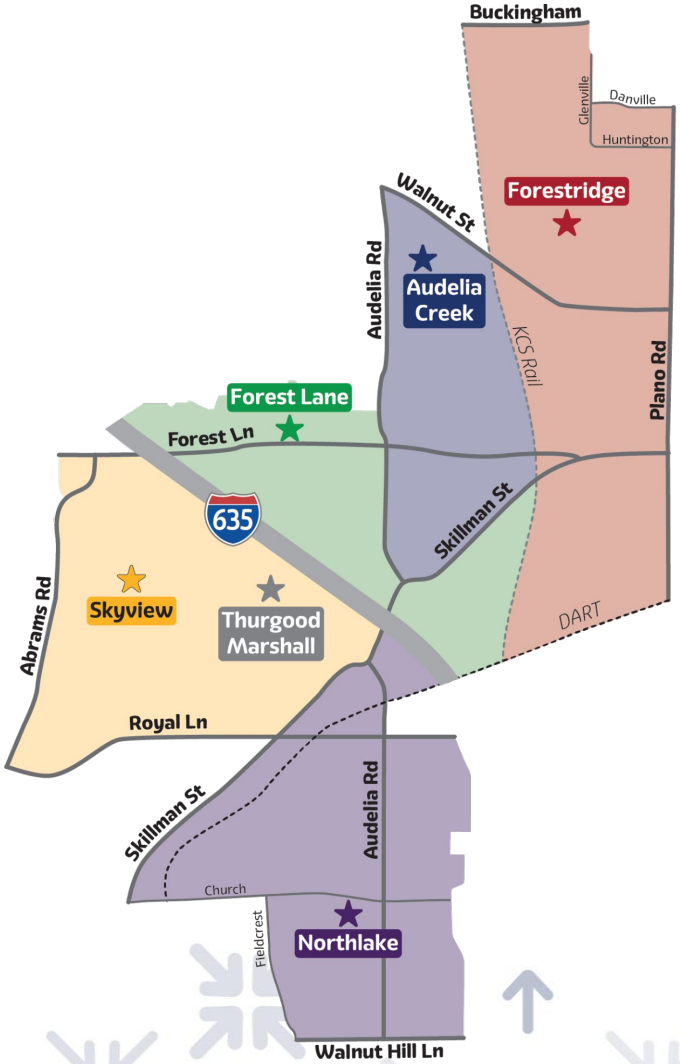
→ Thurgood Marshall is currently utilizing 59% of the building's capacity.

→ Enrollment has declined and is projected to further decline over the next five years.

→ The building is 20 years old, and will be repurposed to become the Thurgood Marshall Learning Center.

PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S) 14-15



PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S)

14-15

REMOVAL OF NON-CONTIGUOUS BOUNDARIES

Impacts: Dover, Forestridge, Greenwood Hills, MST Magnet, Skyview, and Springridge

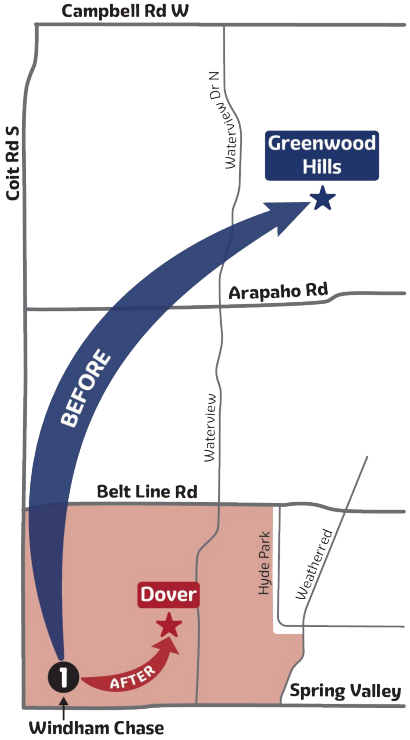
→ Non-contiguous boundaries are no longer needed for managing enrollment growth.

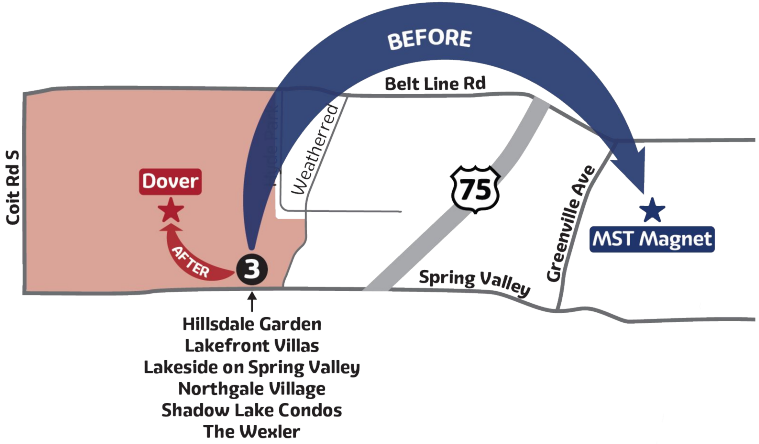
→ Rezoning eliminates the need and expense of bus transportation.

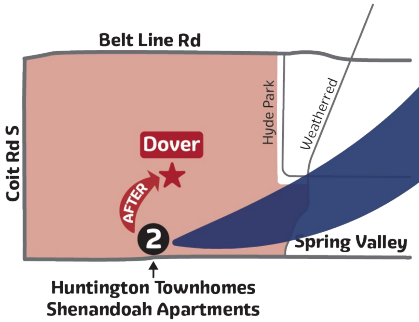
→ Schools receiving students can accommodate additional students without renovation.

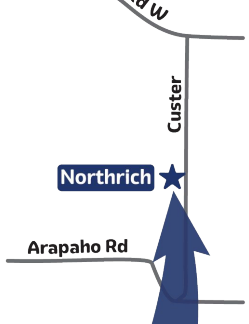
PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S) 16-18





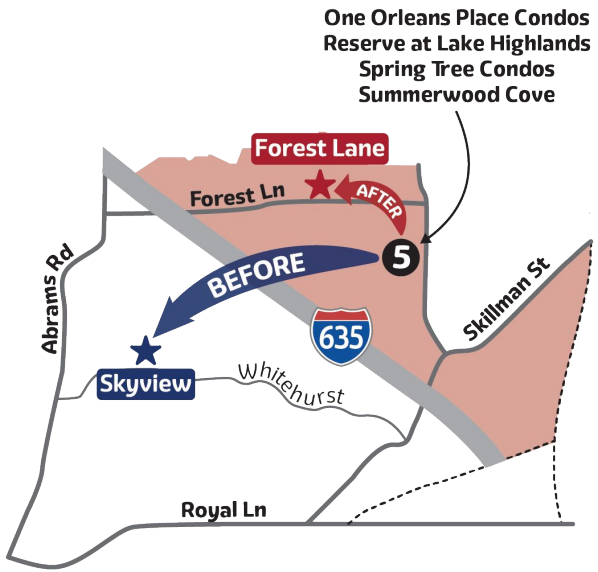


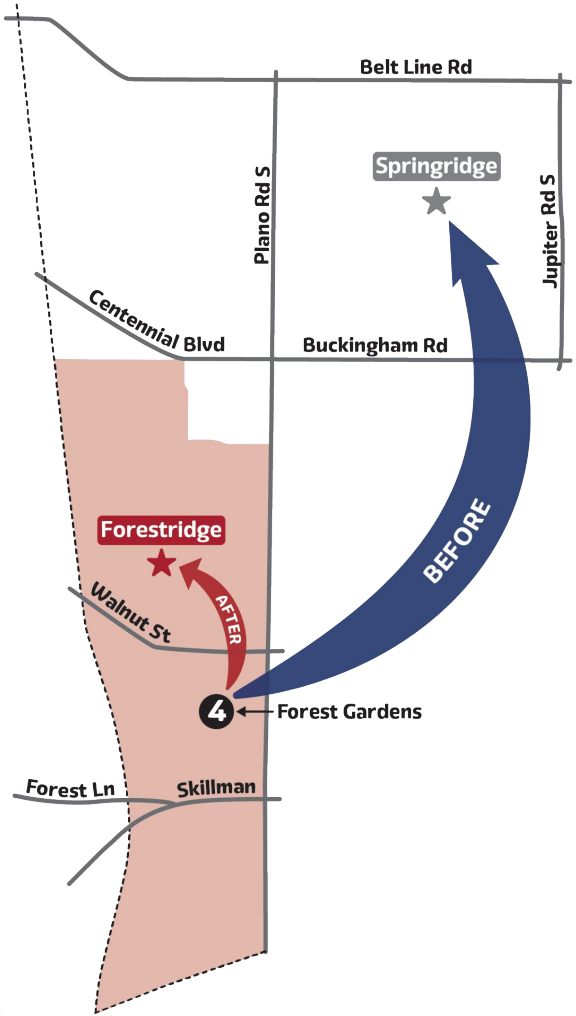


PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S)

16-18





PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S)

16-18

DOBIE PRE-KINDERGARTEN

Consolidation starts with the 2025-26 school year.

Impacts: Carolyn Bukhair, RISD Academy, RISD Pre-K

→ Dobie became a pre-K school at a time when pre-K was rare.

→ Most RISD students can attend pre-K at their regular neighborhood elementary school.

→ Attending pre-K locally reduces the need for bus transportation.

PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S) 19

UTILIZATION BEFORE & AFTER RIGHTSIZE

School	2023-24 Utilization	2024-25 Utilization
Aikin	65%	63%
Arapaho Classical	81%	83%
Audelia Creek	**67%**	**88%**
Big Springs	61%	64%
Bowie	76%	76%
Brentfield	82%	84%
Canyon Creek	**72%**	**91%**
Bukhair	74%	74%
Dartmouth	**65%**	**87%**
Dover	**58%**	**86%**
Forest Lane	**63%**	**76%**
Forestridge	**69%**	**74%**
Greenwood Hills	*59%*	
Hamilton Park	**64%**	**66%**
Jess Harben	76%	71%
Lake Highlands	86%	75%
Mark Twain	61%	60%
MST Magnet	**66%**	**69%**
Merriman Park	74%	72%
Mohawk	**72%**	**74%**

School	2023-24 Utilization	2024-25 Utilization
Moss Haven	71%	68%
Northlake	**94%**	**74%**
Northrich	**49%**	**68%**
Northwood Hills	**54%**	**86%**
O. Henry	79%	90%
Prairie Creek	61%	72%
Prestonwood	87%	89%
Richardson Heights	66%	77%
Richardson Terrace	79%	81%
Richland	71%	76%
RISD Academy	66%	73%
Skyview	**71%**	**79%**
Spring Creek	72%	73%
Spring Valley	*56%*	
Springridge	*59%*	
Stults	65%	64%
Thurgood Marshall	*59%*	
Wallace	65%	66%
White Rock	84%	71%
Yale	**56%**	**75%**

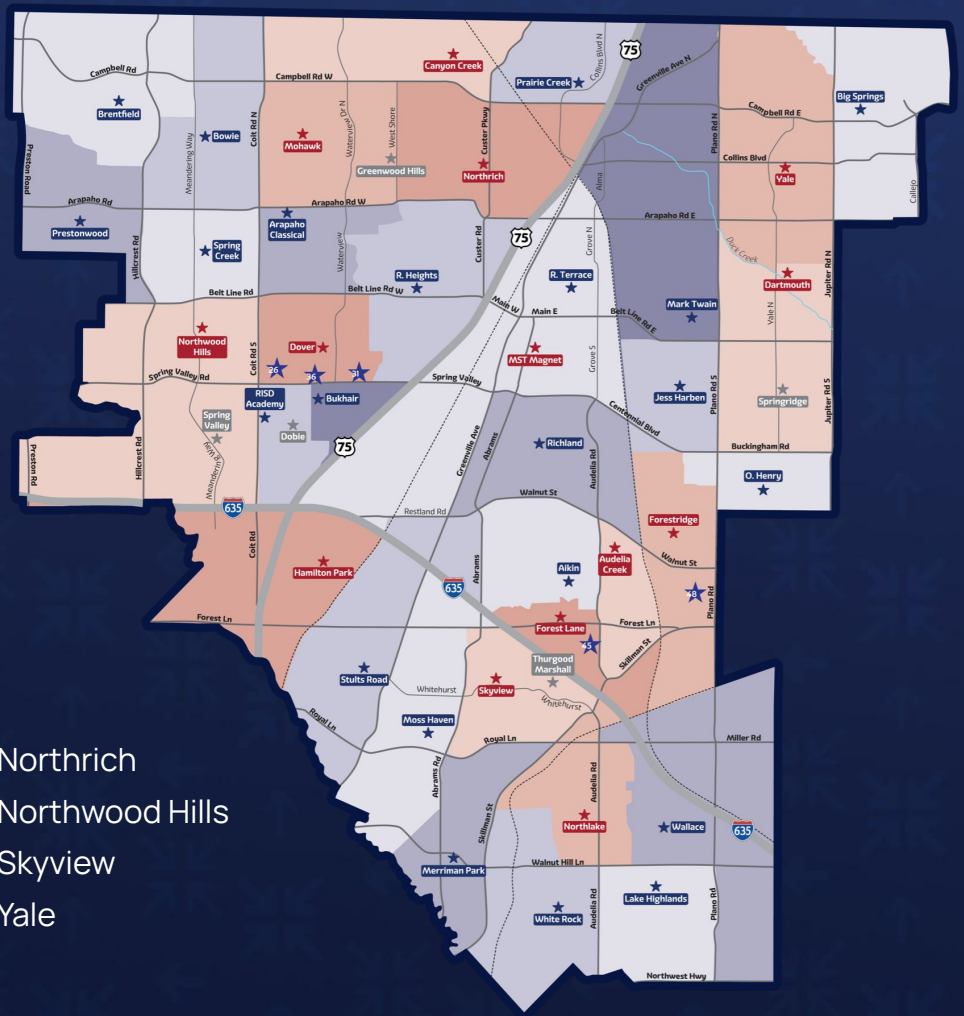
PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S)

21

→ CAMPUSES WITH NEW ATTENDANCE ZONES

- → Audelia Creek
- → Canyon Creek
- → Dartmouth
- → Dover
- → Forest Lane
- → Forestridge
- → Hamilton Park Pacesetter Magnet
- → Mohawk
- → MST Magnet
- → Northlake
- → Northrich
- → Northwood Hills
- → Skyview
- → Yale



PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S)

22-23

→ FACILITY IMPACT & REPURPOSING

Greenwood Hills

(2024-25)

The campus will be maintained by RISD for potential future use as the district considers adding programs of choice with district wide appeal.

Spring Valley

(2024-25)

The building will be repurposed as office space for central RISD employees who currently work at the Professional Development Center.

Springridge

(2024-25)

The campus will be maintained by RISD and a portion will become the future Little Rams/Wildcat Child Learning Academy.

PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S)

8-19

→ FACILITY IMPACT & REPURPOSING

Thurgood Marshall

(2024-25)

The campus will be repurposed as the **Thurgood Marshall Learning Center** and home to three district-wide programs.

- → Thurgood Marshall Accelerated Academy (currently Memorial Park Academy)
- → Thurgood Marshall Center for Law (a new districtwide law-based program)
- → The district alternative education program (currently at the Christa McAuliffe Learning Center)

Dobie Pre-K School

(2025-26)

Through a partnership with the City of Dallas and Dallas County, the building will potentially become a community center for residents.

PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S) **8-19**

FACILITY IMPACT & REPURPOSING

Christa McAuliffe Learning Center

(2024-25)

The facility is adjacent to RISD's bus parking lot and will be repurposed for use by RISD transportation staff.

Memorial Park Academy

(2024-25)

After relocating the program, its portion of the Arzell Ball Center will be repurposed into a professional learning space to help offset the loss of the PDC.

RISD Professional Development Center

(2024-25)

The facility is currently housing support staff offices and meeting space and will be offered for sale to generate one-time funds.

PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S)

8-19

CENTRAL PROGRAMS

The locations and resources of central programs such as bilingual programming and special education were considered when planning Project RightSize to ensure all our enrolled families continue to receive these services without interruption.

Families participating in central programs that are impacted by Project RightSize will be made aware of new program placements by **May 15, 2024**.

As a result of Project RightSize, RISD expects **33 of our 36** elementary schools to offer pre-K by 2025-26.

PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S)

26-27

→ STUDENT AND FAMILY SUPPORT

→ **RISD Counseling and Prevention Services** will be providing opportunities to students and families for conversations and productive processing around Project RightSize.

→ **Campus Ambassador Teams** at campuses receiving students from a consolidated campus will work to acclimate and welcome families and students to their new campus.

PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S)

29-31, 34-35

COMMUNITY EVENTS

We want to honor our retiring campuses through legacy events, and we want to celebrate the new school communities being created through destination events.

DESTINATION EVENTS
To be held by June 2024

Intended to welcome students, families, and staff to their new campus.

LEGACY/RETIREMENT EVENTS
To be held by May 2024

Intended to commemorate and celebrate the heritage of a school as it is retired.

PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S)
32-33

→ STAFF TRANSITION PLAN TIMELINE

Feb. 23	Transition Preference Forms Open
Feb. 29	Transition Preference Forms Due and Transfer Window Opens
Feb. 29-March 28	Employee Placement Process by Human Resources
March 29	Employee Assignment Notifications
April 27	Preferred Employee Job Fair

PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S)

38

→ INITIAL STAFF SUPPORT MEETINGS PLANNED FOR FEBRUARY 23

GREENWOOD HILLS

7:15 a.m.

AND

3:30 p.m.

CENTRAL ADMIN REPRESENTATIVES:

Peggy Dillon
Dr. Kristin Leeper
Katie Barrett
Nancy Kinzie

SPRINGRIDGE ELEMENTARY

7:15 a.m.

AND

3:30 p.m.

CENTRAL ADMIN REPRESENTATIVES:

Lorie Squalls
Dr. Melissa Heller
David Pate
Dr. Sandra Moore

SPRING VALLEY

7:15 a.m.

AND

3:30 p.m.

CENTRAL ADMIN REPRESENTATIVES:

Mike Evans
Dr. Chris Goodson
Dr. Gina Ortiz
Misty Wilson

THURGOOD MARSHALL

7:15 a.m.

AND

3:30 p.m.

CENTRAL ADMIN REPRESENTATIVES:

Jennie Bates
Sandra Hayes
Henry Hall
Leticia McGowan
Charles Bruner

DOBIE PRE-K

7:15 a.m.

AND

3:10 p.m.

CENTRAL ADMIN REPRESENTATIVES:

Mike Jasso
Dr. Matthew Gibbins
Katy Phinney
Shawna Ballast
Dr. Terry Harris

PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S)

41

FAMILY LISTENING TOURS

The district will host the following Listening Tours to answer questions and clarify information about Project RightSize:

GREENWOOD HILLS CAMPUS COMMUNITY	SPRINGRIDGE CAMPUS COMMUNITY	SPRING VALLEY CAMPUS COMMUNITY	THURGOOD MARSHALL CAMPUS COMMUNITY	DOBIE PRE-K CAMPUS COMMUNITY
Monday, February 26	Tuesday, February 27	Wednesday, February 28	Monday, March 4	Tuesday, March 5
6-7:30 p.m.	6-7:30 p.m.	6-7:30 p.m.	6-7:30 p.m.	6-7:30 p.m.
Pearce High School	Berkner High School	Richardson High School	Lake Highlands High School	RISD Academy

PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S) 30

→ TIMELINE AND NEXT STEPS

Feb. 23
Staff Support Meetings

Feb. 26-March 5
Family Listening Tours

March 21
Potential Board Action

→ LEARN MORE

Project RightSize information, budget planning updates, and frequently asked questions will be posted at: **www.risd.org/budget**

→ ASK QUESTIONS

Questions about Project RightSize should be submitted through *Let's Talk*: **www.risd.org/letstalk**

PROJECT RIGHTSIZE

REFER TO PROPOSAL PAGE(S)

49

PROJECT RIGHTSIZE

NORTH STAR GOAL

Every student, teacher and leader will meet or exceed their individual academic growth goal.

- Ensure our limited budget resources are used to prioritize compensation of talent
- Maintain student programming to support student academic outcomes
- Provide the resources necessary to support our staff in achieving the North Star Goal