Medina Valley Independent School District
Board of Trustees
Regular Meeting on Monday, August 24, 2026 at 6:00 PM
Medina Valley ISD Central Office Board Room

A Regular Board Meeting of the MVISD Board of Trustees was held on Monday, August 24, 2026, beginning at 6:00 PM at/on Medina Valley ISD Central Office Board Room.

I. **First Order of Business**
- A Call Meeting to Order
- B Establish a Quorum
- C Pledge of Allegiance to the Flag followed by a Moment of Silence

II. **Public Hearing for the 2026-2027 Budget and the 2026 Tax Rate**
- A Budget Presentation and Tax Rate Presentation 3
- B Receive Public Comments on the Proposed 2026-2027 Budget and the 2026 Tax Rate

III. **Public Comment**

At Regular Board Meetings the Board shall permit public comment on any topic. At all other Board Meetings public comments will be limited to items on the agenda posted with the notice of the meeting. Consistent with Board Policy BEC (Local), when necessary for meeting management, the following will apply: When 1 to 3 individuals sign up to address the Board, they will each be given 5 minutes. When 4 to 6 individuals sign up to address the Board, they will each be given 3 minutes. When 7 or more individuals sign up to address the Board, they will each be given 2 minutes.

IV. **Announcements/Communications/Presentations**
- A Construction Briefing 33
  - Creek View High School
  - Medina Valley High School Ag/JROTC Building
  - Medina Valley ISD Middle School #3
  - Elementary #7
- B Financial Briefing 62
  - General Fund Financial Statement
  - Child Nutrition Financial Statement
  - Debt Service Fund Financial Statement
  - Bond 2023 Capital Projects Report
  - Bond 2024 Capital Projects Report
- C Superintendent Briefing 68
  - Staff/Student Achievements
  - District Enrollment Numbers
- D Priority #1 Update 79

V. **Discussion and Possible Action Items**
- A Consider Approval of Consent Agenda Items 105
  - Minutes for Regular Board Meeting on July 27, 2026, Special Board Meeting on July 27, 2026, and Special Board Meeting on August 12, 2026
  - Memorandum of Understanding(s):
    - Our Lady of the Lake University
    - Believe it Foundation
  - Northside ISD Special Education Shared Services Invoice
  - Procurement for Medina Valley High School HVAC project
  - Bexar County Fire Marshal's permit fees for Elementary #7
  - Resolution — Annual Review of the MVISD Investment Policy and Investment Strategies CDA (Local)
  - Annual Review of Investment Training
  - Adoption of the District's list of Qualified Investment Brokers
  - Purchasing Cooperatives for 2026-2027
- B Consider Approval of the Certified Appraisal Rolls for Medina Valley Independent School District 144
- C Consider Approval of the No-New-Revenue Tax Rate and Voter-Approval Tax Rate for Tax Year 2026 for Medina Valley Independent School District 166
- D Consider Approval of 2026-2027 Budget Line-Items over $50,000 199
- E Consider 2025-2026 Final Amended Budget 202
- F Consider Adoption of 2026-2027 Budget 206
- G Consider Approval of Resolution to Set the Medina Valley Independent School District Tax Rate for 2026 208
- H Consider Approval of Certification of Compliance with Certain Laws under Texas Education Code 39.008, as enacted by Senate Bill 12 (89th Texas Legislative Session). 210

VI. **Closed Session**

A Personnel Matters: Resignations, Retirements, Leaves of Absence, Reassignments, New Employment, New Personnel Position, Duties/Responsibilities of Employees (TX Govt. Code Section 551.074)

B Considering the deployment, specific occasions for, or implementation of, security personnel or devices (TX Govt. Code Section 551.076 and 551.089)

- Discussion regarding the authorization of personnel to serve as a school marshal, including matters related to their appointment, duties, and responsibilities, and other matters related thereto

VII. **Continued Discussion and Possible Action Items**

A Consider Approval to Authorize the Appointment of Personnel as a School Marshal

B Consider Approval of the Superintendent's Personnel Recommendations for August 24, 2026

C Consideration of future meeting dates

VIII. **Adjournment**

(Items do not have to be taken in the same order as shown on the meeting agenda.)

Agenda Item Memorandum

To: MVISD Board of Trustees
Date: August 24, 2026
Agenda item: Public Hearing for 2026-2027 Budget and the 2026 Tax Rate

Background Information:
Texas Education Code, Section 44.004 requires that the district hold a public hearing to discuss the proposed 2026-2027 budgets and tax rates.

Administrative Consideration:

- The Board has received and discussed the proposed 2026-2027 budget over the last few months.
- The budget is required to be adopted before the new fiscal year begins on September 1.
- The proposed 2026-2027 budget amounts at the fund and function level are as follows: General Fund (199) - $120,705,685; Debt Service Fund (511) - $38,595,289; and the Child Nutrition Fund - $8,970,128.
- The proposed tax rates are $0.62660 for Maintenance and Operations and $0.50 for Interest & Sinking for a total tax rate of $1.12660.

Supporting Documents:

- 2026-2027 Budget Book
- 2026-2027 Proposed Budgets by Fund and Function

Recommendation:
It is recommended that the Board conduct a public hearing to discuss the budgets and tax rates as presented.



Budget Workshop

August 24, 2026

Board Calendar

Medina Valley ISD Budget Calendar

2026-2027

Subject to Change

Board Calendar

December 18, 2025
Board of Trustees Meeting - Review Budget Timeline

February 11, 2026
Board of Trustees Workshop - Discuss District Plan and Goals

March 18, 2026
Board of Trustees Meeting - Contracts

July 15, 2026
Board of Trustees Workshop - Report Local Preliminary CAD values and Updated Revenue Estimates

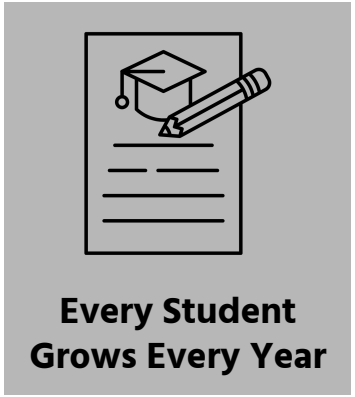
July 25, 2026
Receive certified CAD values and Finalize Revenue Estimates

July 27, 2026
Board of Trustees Meeting - Approve the Compensation Plan

August 12, 2026
Board of Trustees Workshop - Set the Date/Place/Time of Budget Hearing & Review Draft of the Budget Book

August 24, 2026
Board of Trustees Meeting - Approve the 2026-2027 Budget and Tax Rate

Budget Priorities



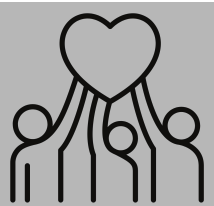
- Continued investments in:
  - Blended Learning
  - MAP Growth monitoring
  - Instructional Coaches
  - PLC Professional Development
  - SchooLinks graduation planning
  - Equipment, certifications, and competition travel for CTE courses
  - Advanced Placement (AP) courses/PreAp
  - Bilingual expansion to Dual Language
  - Math Academies
  - Teacher Incentive Allotment
- Increased investments in:
  - Fine arts and athletics
  - Instructional leadership and training
- Technology investments:
  - Viewboards (40), Chromebooks (1,000), iPads (120)

Budget Priorities



- Increased the Compensation Plan
  - 1% for district and campus administration
  - $0.50 per hour for clerical and trades positions
- Hired $8.4 million in new positions for growth
- Continued implementation of the Teacher Incentive Allotment

Budget Priorities



Parental and Community Involvement

- Continued Investments
  - Community Mailers
  - District Ambassador Program
  - District Surveys
  - Parent Square and Student Square
  - Branding and marketing

Budget Priorities



- New investments included in the budget:
  - Access Point Refresh (450)
  - Grounds and landscape services
- Increased investments:
  - Utilities, insurance, and fuel
  - Safety, health, and the police department
- *Potential District Improvements:
  - Portables
  - Bus Fleet
  - MVHS Updates

**Dependent on enrollment and attendance*

General Fund

Budget Assumptions

- Enrollment Based on Adjusted Demographic Report: 11,189 (+750)
- 92% Attendance Rate
- ADA [(Enrollment - ½ Preschool) x Attendance Rate]: 10,110
- 95.5% Collection Rate
- 7.13% Property Value Growth
- M&O Tax Rate: $0.6266
- I&S Tax Rate: $0.5000
- Current Law

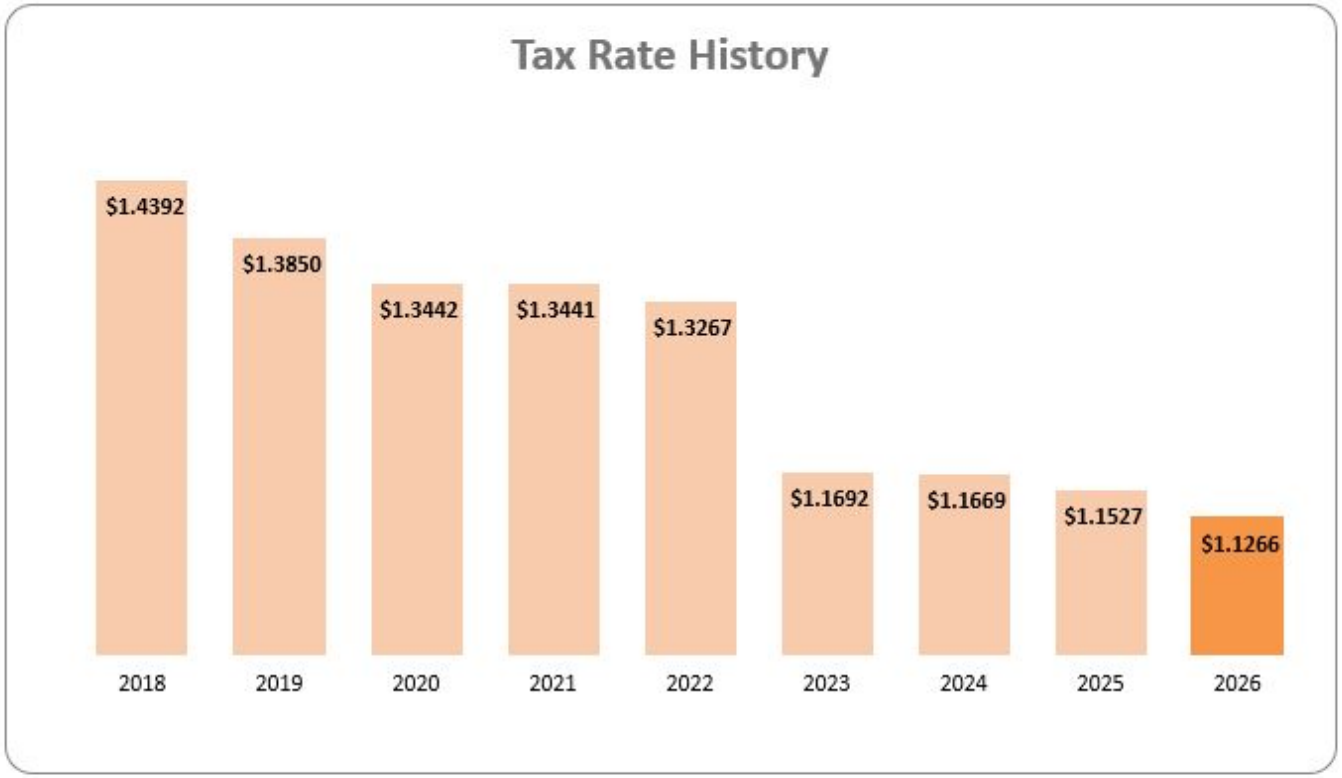
Certified Property Values

	2026	2025	Change	% Change
Bexar County	$3,391,180,535	$3,197,287,037	$193,893,498	6.06%
Medina County	$3,287,489,150	$3,036,810,346	$250,678,804	8.25%
Medina Valley ISD	**$6,678,669,685**	**$6,234,097,383**	**$444,572,302**	**7.13%**
Protest Allowance (4%)	$(71,156,494)	($107,733,222)	$36,586,728	(33.96%)
Budgeted Taxable Value	**$6,607,513,191**	**$6,126,364,161**	**$481,149,030**	**7.85%**

2026-2027 Tax Rate

2026-2027 Projected Tax Rate		
Maintenance & Operations	$0.6266	Per $100 valuation
Debt Service	$0.5000	Per $100 valuation
Total MVISD Tax Rate	**$1.1266**	**Per $100 valuation**

Tax Rate History



2026-2027 Projected Revenue

Prior Year Comparison *By Revenue Source*				
	2025-2026 Adopted Budget	2026-2027 Proposed Budget	Difference	% Change
Local Revenue	$ 40,765,553	$ 41,226,195	$ 460,642	1.1%
State Revenue	$ 71,491,040	$ 78,561,490	$ 7,070,450	9.9%
Federal Revenue	$ 490,000	$ 918,000	$ 428,000	87.3%
Total:	**$ 112,746,593**	**$ 120,705,685**	**$ 7,959,092**	**7.1%**

2026-2027 Projected Expenditures

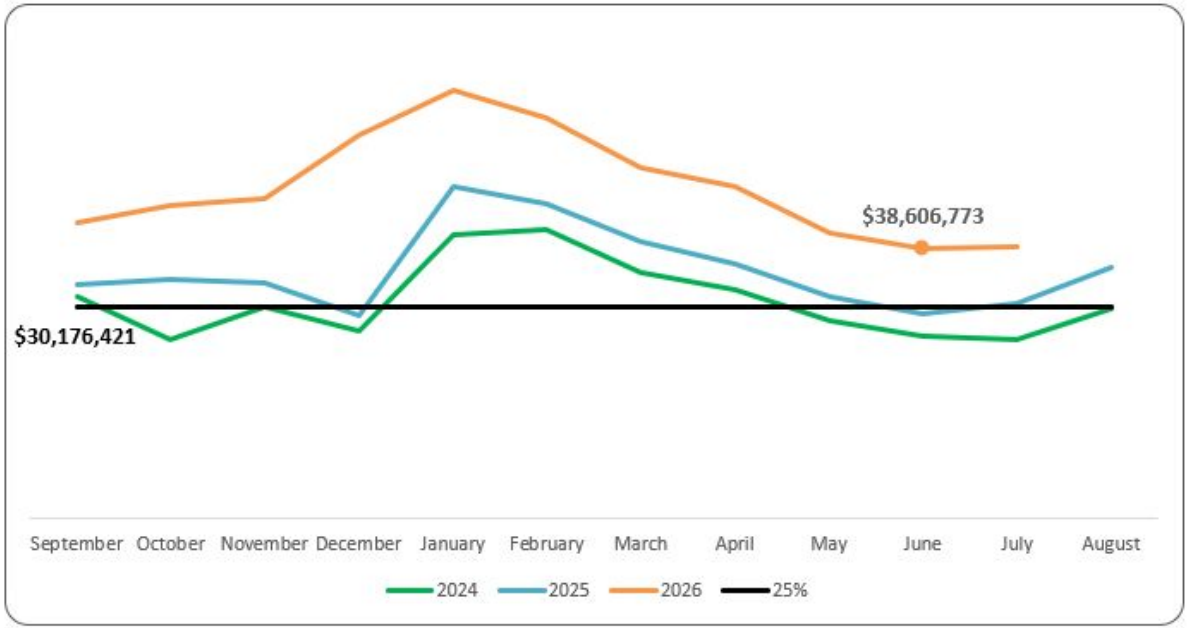
Prior year Comparison *By Major Object Code*				
	2025-2026 Adopted Budget	2026-2027 Proposed Budget	Difference	% Change
6100 Payroll	$ 91,514,768	$ 101,267,235	$ 9,752,467	10.7%
6200 Contracted Services	$ 6,216,766	$ 7,345,527	$1,128,761	18.2%
6300 Supplies & Materials	$ 7,816,228	$ 7,477,737	($ 338,491)	(4.3%)
6400 Other Operating Costs	$ 2,478,271	$ 3,228,186	$749,915	30.3%
6500 Debt Service	$ 0	$ 0	$ 0	0%
6600 Capital Outlay	$ 4,720,560	$ 1,387,000	($3,333,560)	(70.6%)
Total:	**$112,746,593**	**$120,705,685**	**$7,959,092**	**7.1%**

2025-2026 Fund Balance Projections

As of August 24, 2026

	2024-2025 Audited	2025-2026 Projected	2026-2027 Proposed
Total Revenue	$101,629,845	$112,235,084	$120,705,685
Total Expenditures	$96,454,068	$110,235,084	$120,705,685
Contribution to Fund Balance	$5,175,777	$2,000,000	$0
Fund Balance Projection	**$35,958,901**	**$37,958,901**	**$37,958,901**
Fund Balance Recommendation - 25%	*$24,113,517*	*$27,558,771*	*$30,176,421*

Fund Balance History



- 25% for FIRST Rating
- Cash balance never drops below $38.6 million

Debt Service Fund

2026-2027 Projected Revenue

Prior Year Comparison *By Revenue Source*				
	2025-2026 Adopted Budget	2026-2027 Proposed Budget	Difference	% Change
5711 Taxes, Current Year Levy	$ 29,442,357	$ 30,856,363	$ 1,414,006	54.8%
5712 Prior Year Taxes	$ 150,000	$ 125,000	($25,000)	(16.7%)
5719 Penalties & Interest	$150,000	$150,000	$0	0%
5742 Earnings Temp. Investments	$ 350,000	$ 350,000	$0	0%
5829 State Programs (ASAHE)	$ 6,603,098	$ 7,113,926	$ 510,828	7.7%
Total:	**$36,695,455**	**$38,595,289**	**$1,899,834**	**5.2%**

2026-2027 Projected Expenditures

Prior Year Comparison				
	2025-2026 Adopted Budget	2026-2027 Proposed Budget	Difference	% Change
Current Principal and Interest	$ 36,689,455	$ 38,589,289	$ 1,899,834	5.2%
Other Debt Fees	$ 6,000	$ 6,000	$0	0%
Total:	**$36,695,455**	**$38,595,289**	**$1,899,834**	**5.2%**

2025-2026 Fund Balance Projections

As of August 24, 2026

Beginning Fund Balance	$6,471,898
Projected Revenue	$36,728,102
Projected Expenses	$36,700,000
Projected Fund Balance	$6,500,000

Child Nutrition Fund

Budget Assumptions

- Enrollment Based on Adjusted Demographic Report: 11,189 (+750)
- 3% Increase to Consumer Price Index (CPI)
- Federal Reimbursement Rates:
  - **Paid lunch**: **$0.45** (up 1¢ from 2025–26)
  - **Free lunch**: **$4.76** (up 16¢ from 2025–26)
  - **Reduced-price lunch**: **$4.36** (up 16¢ from 2025–26)
- Local student meal prices will remain:
  - **Breakfast: $1.60**
  - **Lunch: $3.10**

2026-2027 Projected Revenue

Prior Year Comparison *By Revenue Source*				
	2025-2026 Adopted Budget	2026-2027 Proposed Budget	Difference	% Change
5700 – Local Revenue	$2,244,200	$2,276,700	$ 32,500	1.4%
5800 – State Revenue	$ 29,000	$ 29,855	$ 855	2.9%
5900 – Federal Revenue	$ 5,096,171	$ 5,748,448	$652,277	12.8%
GRAND TOTAL:	**$7,369,371**	**$8,055,003**	**$685,632**	**9.3%**

2026-2027 Projected Expenditures

Prior Year Comparison *By Major Object Code*				
	2025-2026 Adjusted Budget	2026-2027 Proposed Budget	Difference	% Change
6100 - Payroll	$ 2,790,690	$3,150,377	$359,687	12.9%
6200 – Contracted Services	$ 252,000	$228,500	($23,500)	(9.3%)
6300 – Food and Supplies	$ 4,910,864	$5,206,751	$295,887	12.1%
6400 - Misc. Operating Exp.	$ 96,000	$84,500	($11,500)	(12.0%)
6600 – Capital Outlay	$ 325,000	$300,000	($25,000)	(7.7%)
GRAND TOTAL:	**$8,374,554**	**$8,970,128**	**$595,574**	**7.1%**

2025-2026 Fund Balance Projections

As of August 24, 2026

Beginning Fund Balance	$2,797,461
Projected Revenue	$7,250,000
Projected Expenses	$7,400,000
Projected Fund Balance	$2,647,461

DRAFT - All Board Adopted Budgets by Fund and Function

Proposed Budgets 2026-2027					
	By Function	*General Fund*	*Child Nutrition Fund*	*Debt Service Fund*	*Total All Funds*
11	Instruction	$69,968,233			$69,968,233
12	Instructional Resource / Media	$231,910			$231,910
13	Curriculum & Instructional Staff Development	$2,589,066			$2,589,066
21	Instructional Leadership	$2,330,456			$2,330,456
23	School Leadership	$6,410,046			$6,410,046
31	Guidance, Counseling, and Evaluation Services	$4,496,967			$4,496,967
32	Social Work Services	$612,144			$612,144
33	Health Services	$1,545,228			$1,545,228
34	Student (Pupil) Transportation	$5,446,125			$5,446,125
35	Child Nutrition	$108,577	$8,970,128		$9,078,705
36	Co-curricular / Extracurricular Activities	$4,175,080			$4,175,080
41	General Administration	$3,487,794			$3,487,794
51	Plant Maintenance & Operations	$12,065,901			$12,065,901
52	Security & Monitoring Services	$2,306,786			$2,306,786
53	Data Processing Services	$2,872,664			$2,872,664
61	Community Services	$1,000			$1,000
71	Debt Service	$0		$38,595,289	$38,595,289
81	Facilities Acquisition & Construction	$1,302,708			$1,302,708
95	JJAEP Payments	$5,000			$5,000
99	Other Intergovernmental Charges	$750,000			$750,000
	Total Expenditures:	$120,705,685	$8,970,128	$38,595,289	$168,271,02

Special Revenue

2026-2027 Special Revenue and Grants

2026-2027 Special Revenue Funds *Planning Amounts as of August 2026*		
Fund	**Title of Fund**	**Total**
206	McKinney-Vento Homeless Grant	TBD
211	Title I Part A Improving Basic Programs	$778,396
211	Title I Part C Migrant	$14,090
224	Idea B Formula	$1,753,390
225	Idea B Preschool	$19,030
244	Carl Perkins Basic Formula Grant	$52,544
255	Title II Teacher & Principal Training	$169,576
263	Title III ELA	$79,929
289	Title IV Part A Safe & Drug Free Schools	$61,525
410	Instructional Materials Allotment (biennium)	$1,269,956
487	Education Foundation Grants	TBD
	Total Expenditures	**$4,198,436**

2026-2027 Federal Entitlements

Public Input

Board of Trustees Meeting: Creek View High School Construction Briefing

Monday, August 24, 2026

GENERAL PROJECT SUMMARY:

General Contractor (CMR):	Bartlett Cocke General Contractors
Original Substantial Completion Date:	June 2026
Requested Days to Date	Zero (0)
Contract Sum (GMP):	$254,950,157.00
Change Order Sum to Date:	$9,643,432.00
Current Contract Sum:	$264,593,589.00

Percentage of Work Complete:

Original GMP:	99% - Pay Application No. 36 (Aug. 2026) $257,715,475.00 Total Stored/Completed
Stadium Improvements:	96% - Pay Application No. 36 (Aug. 2026)

insert new aerial

insert new aerial

insert press box image

insert concession image

insert concession image

Board of Trustees Meeting: MVHS AG & JROTC Building Construction Briefing

Monday, July 27, 2026

GENERAL PROJECT SUMMARY:

General Contractor (CSP):	WR Griggs Construction
Original Substantial Completion Date:	Sept. 30, 2026
Requested Days to Date:	Zero (0)
Contract Sum:	$11,550,000.00
Change Order Sum to Date:	$0.00
Current Contract Sum:	$11,550,000.00
Percentage of Work Complete:	87% - Pay Application No.16 (Aug. 2026) $10,029,068.00 Total Stored/Completed









Board of Trustees Meeting:
MVISD Middle School #3
Construction Briefing

Monday, July 27, 2026

GENERAL PROJECT SUMMARY:

General Contractor (CSP): Contractors	Bartlett Cocke General
Original Substantial Completion Date:	May 2027
Requested Days to Date:	Zero (0)
Contract Sum:	$72,000,000.00
Change Order Sum to Date:	$0.00
Current Contract Sum:	$72,000,000.00
Percentage of Work Complete:	54% - Pay Application No. 15 (Aug. 2026) $38,874,462.00 Total Stored/Completed
















ATTENTION
ATENCIÓN

Board of Trustees Meeting:
MVISD Elementary School #7
Construction Briefing

Monday, July 27, 2026

GENERAL PROJECT SUMMARY:

Project is out to bid for General Contractors

Proposal Bid Opening: Sept. 10, 2026

General Contractor Recommendation: October, 2026

Construction Notice to Proceed: November, 2026

Substantial Completion: May, 2028

Medina Valley Independent School District

Monthly Financial Report

July 2026

Executive Summary

Financial Highlights: In the general fund, the district has collected 90% of budgeted revenues and spent 87% of budgeted expenses. In July 2025, the district collected 83% of actual revenue and spent 90% of actual expenses. In the food service fund, the district has collected 89% of budgeted revenues and spent 78% of budgeted expenses. In July 2025, the district collected 91% of actual revenue and spent 92% of budgeted expenses. The debt service fund has collected 101% of budgeted revenue.

Fund Balance

	General Fund	Food Service	Debt Service
Fund Balance as of August 31, 2025	$ 35,958,901	$ 2,797,461	$ 6,471,898
Year-to-Date Revenue	$ 101,909,287	$ 6,525,083	$ 36,997,940
Year-to-Date Expenditures	$ (99,333,475)	$ (6,524,929)	$ (22,047,847)
Fund Balance as of June 30, 2026	**$ 38,534,713**	**$ 2,797,615**	**$ 21,421,991**

Budget Amendments

	General Fund	Food Service	Debt Service
Revenue	$ 88,828	$ -	$ -
Expenditures	$ 1,390,929	$ -	$ -

JULY 2025-2026
MEDINA VALLEY INDEPENDENT SCHOOL DISTRICT

ESTIMATED REVENUES	CURRENT BUDGET	YTD ACTUAL	BALANCE
5700 - LOCAL REVENUES	$40,854,381	$39,507,949	$1,346,432
5800 - STATE PROGRAM REVENUES	$71,491,040	$61,797,993	$9,693,047
5900 - FEDERAL REVENUES	$490,000	$603,345	($113,345)
TOTAL REVENUES	**$112,835,421**	**$101,909,287**	**$10,926,134**
PROPOSED APPROPRIATIONS			
11 - INSTRUCTION	$64,846,478	$57,798,548	$7,047,930
12 - INST. RESOURCES & MEDIA SVCS	$584,391	$319,299	$265,091
13 - CURRICULUM DEV.& INST.STF DEV	$1,889,319	$1,512,387	$376,932
21 - INSTRUCTIONAL LEADERSHIP	$2,122,332	$1,941,939	$180,393
23 - SCHOOL LEADERSHIP	$5,806,117	$5,176,494	$629,623
31 - GUIDANCE & COUNSELING	$4,176,914	$3,626,836	$550,078
32 - SOCIAL WORK SERVICES	$629,185	$556,808	$72,377
33 - HEALTH SERVICES	$1,372,834	$1,172,454	$200,380
34 - PUPIL TRANSPORTATION	$7,429,765	$6,768,561	$661,204
35 - FOOD SERVICES	$227,897	$126,081	$101,816
36 - COCURR./EXTRACURR.ACTIVITIES	$3,112,957	$2,797,704	$315,253
41 - GENERAL ADMINISTRATION	$3,311,082	$2,962,558	$348,524
51 - PLANT MAINTENANCE & OPERATIONS	$10,933,587	$8,469,522	$2,464,065
52 - SECURITY & MONITORING SERVICES	$2,176,135	$1,921,893	$254,242
53 - DATA PROCESSING SERVICES	$2,448,412	$2,079,386	$369,025
61 - COMMUNITY SERVICES	$1,000	$0	$1,000
81 - FACILITIES ACQ. & CONSTRUCTION	$2,377,217	$1,423,414	$953,804
95 - PYMTS.TO JJAEP PROGRAMS	$5,000	$0	$5,000
99 - OTHER INTERGOVERNMENTAL CHARGE	$686,900	$679,590	$7,310
TOTAL APPROPRIATIONS	**$114,137,522**	**$99,333,475**	**$14,804,046**

2025-2026 FUND BALANCE = $ 35,958,901 3 MONTH OPERATING CASH FLOW = $ 28,534,380

JULY 2025-2026
MEDINA VALLEY INDEPENDENT SCHOOL DISTRICT

ESTIMATED REVENUES	CURRENT BUDGET	YTD ACTUAL	BALANCE
5700 - LOCAL REVENUES	$2,244,200	$1,809,750	$434,450
5800 - STATE PROGRAM REVENUES	$29,000	$28,329	$671
5900 - FEDERAL REVENUES	$5,096,171	$4,687,003	$409,168
TOTAL REVENUES	**$7,369,371**	**$6,525,083**	**$844,288**
PROPOSED APPROPRIATIONS			
35 - FOOD SERVICES	$8,374,554	$6,524,929	$1,849,625
TOTAL APPROPRIATIONS	**$8,374,554**	**$6,524,929**	**$1,849,625**

2025-2026 FUND BALANCE = $ 2,797,461 3 MONTH OPERATING CASH FLOW = $ 2,093,638

JULY 2025-2026
MEDINA VALLEY INDEPENDENT SCHOOL DISTRICT

ESTIMATED REVENUES	CURRENT BUDGET	YTD ACTUAL	BALANCE
5700 - LOCAL REVENUES	$30,092,357	$29,293,794	$798,563
5800 - STATE PROGRAM REVENUES	$6,603,098	$7,704,146	($1,101,048)
TOTAL REVENUES	**$36,695,455**	**$36,997,940**	**($302,485)**
PROPOSED APPROPRIATIONS			
71 - DEBT SERVICES	$36,695,455	$22,047,847	$14,647,608
TOTAL APPROPRIATIONS	**$36,695,455**	**$22,047,847**	**$14,647,608**

2025-2026 FUND BALANCE = $ 6,471,898

Medina Valley ISD

Bond 2023 Summary

July 31, 2026

2023 Bond Projects	*Original Budget*	*Adjusted Budget*	*Cumulative Encumbrances*	*Cumulative Expenses*	*Balance*
High School #2	$ 323,000,000	$ 308,000,000	$ 25,820,725	$ 255,247,557	$ 26,931,718
Traffic Improvements	$ 4,000,000	$ 4,000,000	$ -	$ 1,191,758	$ 2,808,242
Agricultural & Jr. ROTC Facility	$ 14,000,000	$ 14,000,000	$ 4,789,610	$ 8,479,394	$ 730,996
Safety & Security Projects	$ 5,000,000	$ 4,018,649	$ 503,570	$ 3,507,350	$ 7,730
Land	$ 30,000,000	$ 30,000,000	$ 52,762	$ 23,949,108	$ 5,998,130
Project Savings:	$ -				
Middle School #3	**$ -**	$ 15,000,000	$ 147,486	$ 14,646,153	$ 206,361
Police Department	**$ -**	$ 981,350	$ 385,944	$ 532,583	$ 62,822
Total Projects	**$ 376,000,000**	**$ 375,999,999**	**$ 31,700,097**	**$ 307,553,903**	**$ 36,746,000**
Fees Associated with Sale of Bond		$ 830,037	$ -	$ 830,037	$ -
Total Bond Package	**$ 376,000,000**	**$ 376,830,036**	**$ 31,700,097**	**$ 308,383,940**	**$ 36,746,000**
Bond Interest		$ 14,821,024	$ -	$ -	$ 14,821,024
Debt Payment		$ 11,698,450	$ -	$ 11,698,450	$ -
MVHS HVAC Project		$ 776,300	$ 298,876	$ 477,425	$ -
Arbitrage		$ 8,391,230	$ -	$ 3,000	$ 8,388,230
Salaries	$ -	$ 949,201	$ -	$ 917,778	$ 31,423
Total Interest Earnings	**$ -**	**$ 36,636,205**	**$ 298,876**	**$ 13,096,653**	**$ 23,240,677**

**Unaudited*

Medina Valley ISD

Bond 2024 Summary

July 31, 2026

2024 Bond Projects	*Original Budget*	*Adjusted Budget*	*Cumulative Encumbrances*	*Cumulative Expenses*	*Balance*
Middle School #3	$ 102,000,000	$ 83,380,000	$ 41,885,086	$ 16,470,621	$ 25,024,293
Elementary School #7	$ 62,000,000	$ 46,770,000	$ 1,346,361	$ 1,870,425	$ 43,553,214
Elementary School #8	$ 62,000,000	$ -	$ -	$ -	$ -
Safety & Security Projects	$ 2,500,000	$ -	$ -	$ -	$ -
PE Improvements	$ 5,750,000	$ -	$ -	$ -	$ -
Land	$ 14,900,000	$ -	$ -	$ -	$ -
MVHS Stadium Improvements	$ 29,050,000	$ 850,000	$ 434,623	$ 197,139	$ 218,238
CVHS Stadium Improvments	$ 11,800,000	$ 11,200,000	$ 2,184,994	$ 7,529,660	$ 1,485,346
Project Savings - Prop A	$ -	$ -	$ -	$ -	$ -
Project Savings - Prop B	$ -	$ -	$ -	$ -	$ -
Total Projects	**$ 290,000,000**	**$ 142,200,000**	**$ 45,851,064**	**$ 26,067,846**	**$ 70,281,091**
Fees Associated with Sale of Bond		$ 622,073	$ -	$ 622,073	$ -
Total Bond Package	**$ 290,000,000**	**$ 142,822,073**	**$ 45,851,064**	**$ 26,689,919**	**$ 70,281,091**
Bond Interest - Prop A		$ 4,923,974	$ -	$ -	$ 4,923,974
Bond Interest - Prop B		$ 616,600	$ -	$ -	$ 616,600
Arbitrage Liability		$ 51,366	$ -	$ 1,500	$ 49,866
Total Interest Earnings	**$ -**	**$ 5,591,941**	**$ -**	**$ 1,500**	**$ 5,590,441**

**Unaudited*



MEDINA VALLEY ISD
EST. 1959

Superintendent Briefing
August 24, 2026

Welcoming our newest members at the New Teacher Luncheon





Hosted by the Castroville Area Chamber of Commerce, the New Teacher Luncheon at Creek View High School welcomed our newest educators with thoughtful gifts and a delicious lunch provided by the Chamber, helping our new team members feel right at home as they begin their journey with MVISD.

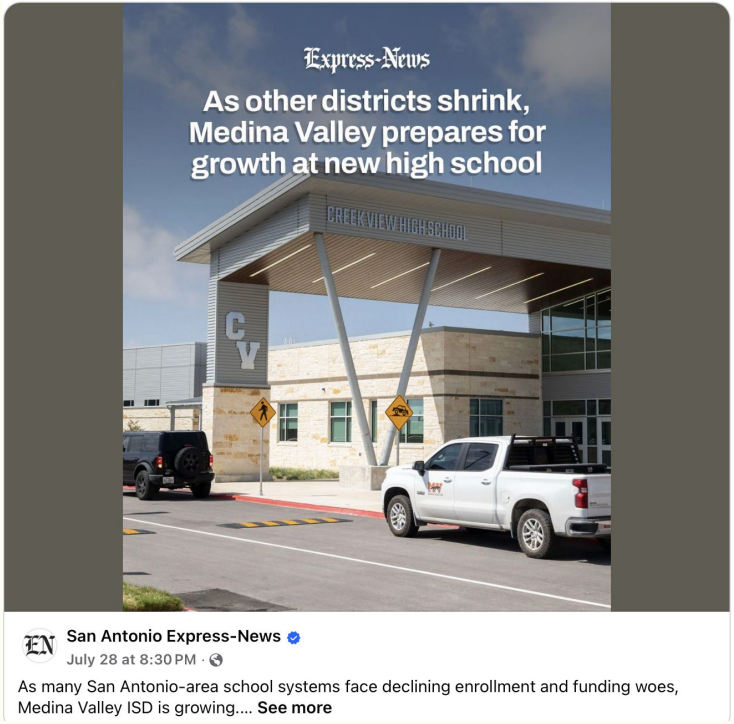
Medina Valley ISD celebrated the opening of Creek View High School





On July 29, the Medina Valley community came together for the Creek View High School Ribbon Cutting Ceremony, celebrating the new campus and the beginning of a new chapter filled with opportunities, memories, and traditions for future generations of Cougars.

Medina Valley ISD featured in San Antonio Express-News ahead of Creek View opening



Medina Valley ISD was proud to be featured in the San Antonio Express-News story, As other districts shrink, Medina Valley prepares for growth at new high school,". Highlighting the district's continued growth ahead of the opening of Creek View High School.

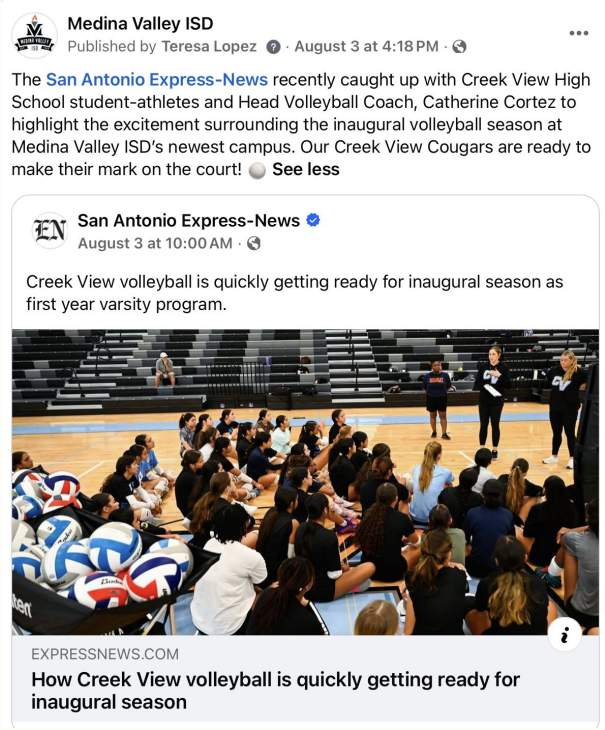
KSAT 12 spotlights Medina Valley football ahead of new 5A season





The Medina Valley Panthers are gearing up for an exciting season in Class 5A, with plenty of returning starters and high expectations. KSAT 12 & KSAT.com highlighted the team as they prepare for another competitive season on the field.

San Antonio Express-News Highlights Creek View's Inaugural Volleyball Season



The San Antonio Express-News recently caught up with Creek View High School student-athletes and Head Volleyball Coach Catherine Cortez to spotlight the excitement surrounding the Cougars' inaugural volleyball season and their journey to make their mark on the court.

MVISD families came together before school at the Family Resource Fair



Hundreds of backpacks, school supplies, shoes, and essential resources were distributed to Medina Valley ISD families at the Family Resource Fair, helping students head into the new school year prepared and confident.

HEB Donates $10,000 to MVEF at Convocation





The 2026 MVISD Convocation brought staff together for a morning of school spirit, inspiring student testimonials, creative campus themes, and a $10,000 H-E-B donation to the Medina Valley Education Foundation.

Meet the Teacher night welcomed MVISD Elementary families.







Elementary campuses were filled with excitement as families met their teachers, explored classrooms, connected with classmates, and got ready for a great first day of school.

Creek View High School featured across local news on first day



Creek View High School's first day of school was featured across four local news stations as **News 4 San Antonio, KSAT 12, KABB FOX 29, and KENS 5** stopped by to capture the excitement of opening day, including Cougar spirit from our cheerleaders and dance team and interviews with coaches, Superintendent Emily Lorenz, Principal Melissa Gonzales, and Creek View students.

MVISD brings families together at Military Night





Medina Valley ISD hosted Military Night, bringing families from across all 10 campuses together to hear from guest speakers, explore valuable resources, and connect with fellow military families in the community.

BALANCED SCORECARD

Priority 1 Update

August 24, 2026

MEDINA VALLEY ISD
EST. 1959

STRATEGIC PLAN

MISSION AND VISION

MISSION

Medina Valley ISD exists to develop, cultivate, and inspire self-directed critical thinkers and life-long learners who strive to achieve their highest potential.

VISION

Medina Valley ISD will empower students to exhibit the attributes of the District's Profile of a Graduate.

MEDINA VALLEY ISD
EST. 1959

CORE BELIEFS AND COMMITMENTS

All students will reach their full potential.

Medina Valley ISD will provide all students with a challenging and well-rounded education.

We believe student success is best achieved...

...through a quality education that addresses all students' academic, social, and emotional needs.
Medina Valley ISD will recruit and retain high-quality and highly-qualified staff.

...by providing an engaging, safe, and balanced learning environment for students involving parents, teachers, and the community.
Medina Valley ISD will provide a supportive and safe learning environment.

...by fostering student experiences that teach them to value and respect the differences of others.
Medina Valley ISD will provide a collaborative, inclusive, and effective learning community.

We believe all staff play a critical role in the success of our students.

Medina Valley ISD will effectively facilitate and contribute to teamwork, and provide relevant and sustainable professional development.

MEDINA VALLEY EST. 1959 ISD

DISTRICT GOALS

Medina Valley ISD will...

1. take a proactive role in planning for our rapidly growing population.
2. ensure proper allocation of funds to support all areas of the district.
3. provide a variety of academic and extracurricular activities that promote well-rounded, career-minded students.
4. foster an environment of parental and community involvement through open communication.
5. provide relevant and reliable technology for staff, students, and guests.
6. provide and maintain facilities that are appropriate for district programs, while instilling a sense of pride.
7. exceed federal/state/local legislative requirements to develop an educational journey for each student's interests and success.
8. recruit and retain quality staff while offering relevant professional development and leadership opportunities.

MEDINA VALLEY ISD EST. 1959

PRIORITY 1

EVERY STUDENT GROWS EVERY YEAR.

PRIORITY 1: PERFORMANCE OBJECTIVES

- 1.1 Curriculum and Instruction
- 1.2 College, Career, and Military Readiness
- 1.3 Safety and Well-Being
- 1.4 Extracurricular and Co-curricular Opportunities

2025-2026

State Accountability Ratings

The Texas Education Agency released the 2025 A-F Accountability Ratings for public schools across the state. Our Panthers, Wildcats, and Cubs did an amazing job and showed lots of growth, we are so very proud of our students, staff, and administrators!

Medina Valley ISD
B/82
Increase of 2 points from 2025!

Medina Valley HS
B/89
Increase of 5 points from 2025!

Medina Valley MS
C/79
Great gains in Academic Growth!

Loma Alta MS
B/86
Increase of 6 points from 2025!

Lacoste ES
C/76
Maintained in Academic Growth!

Potranco ES
B/81
Increase of 3 points from 2025!

Luckey Ranch ES
C/78
Increase of 3 points from 2025!

Ladera ES
C/72
Maintained in Academic Growth!

Silos ES
C/72
Increase of 5 points from 2025!

Castroville ES
A/91
Increase of 4 points from 2025!

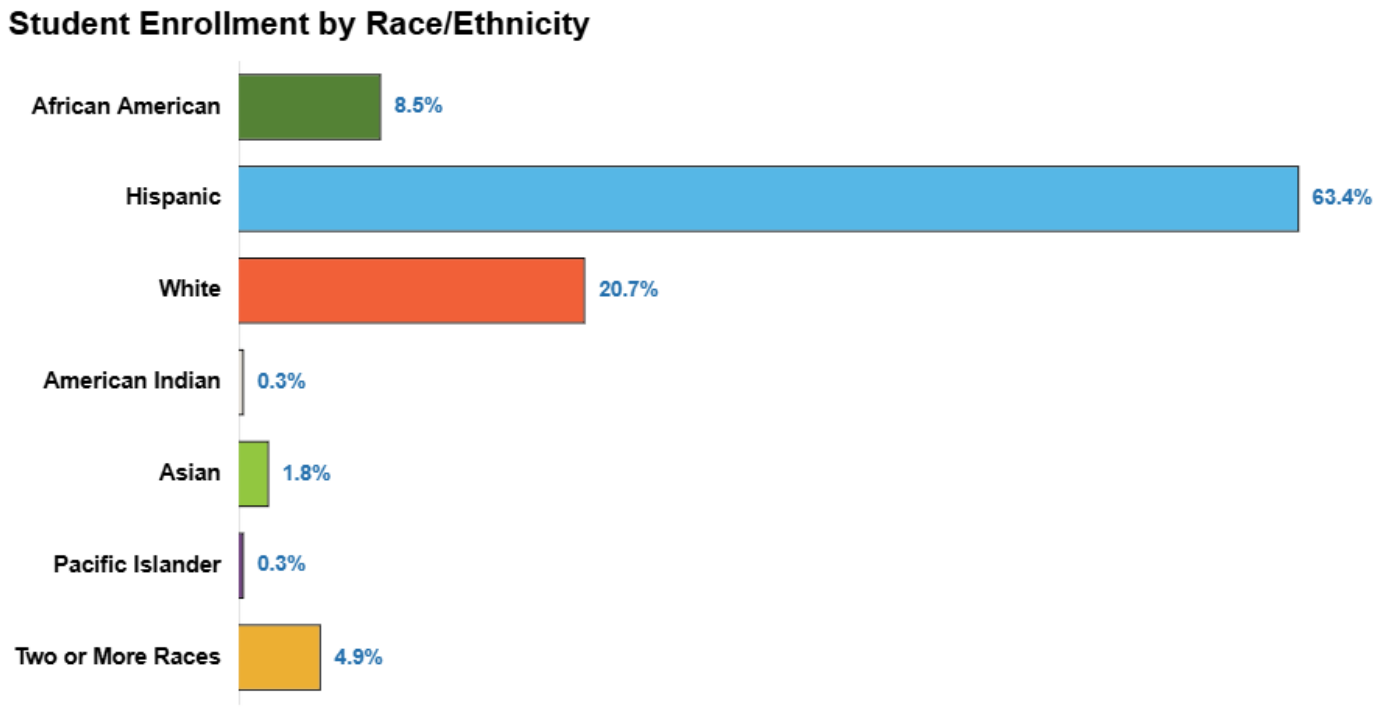
DISTRICT TOTAL DISTINCTION DESIGNATIONS
10

2025-2026 ACCOUNTABILITY

Entity	2025 -2026 Score	2025-2026 Rating	2024 -2025 Score	2024-2025 Rating	Increase / Decrease
Medina Valley ISD	82	B	80	B	+2
Medina Valley High School	89	B	84	B	+5
Medina Valley Middle School	79	C	79	C	0
Loma Alta Middle School	86	B	80	B	+6
Castroville Elementary	91	A	87	B	+4
Lacoste Elementary	76	C	79	C	-3
Potranco Elementary	81	B	78	C	+3
Luckey Ranch Elementary	78	C	75	C	+3
Ladera Elementary	72	C	73	C	-1
Silos Elementary	72	C	67	D	+5

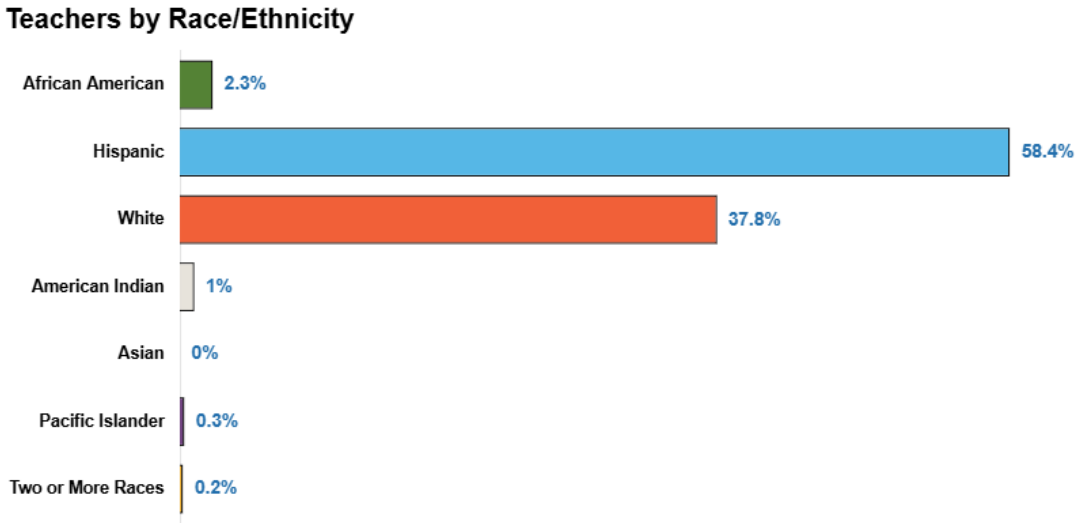
ENROLLMENT DEMOGRAPHICS

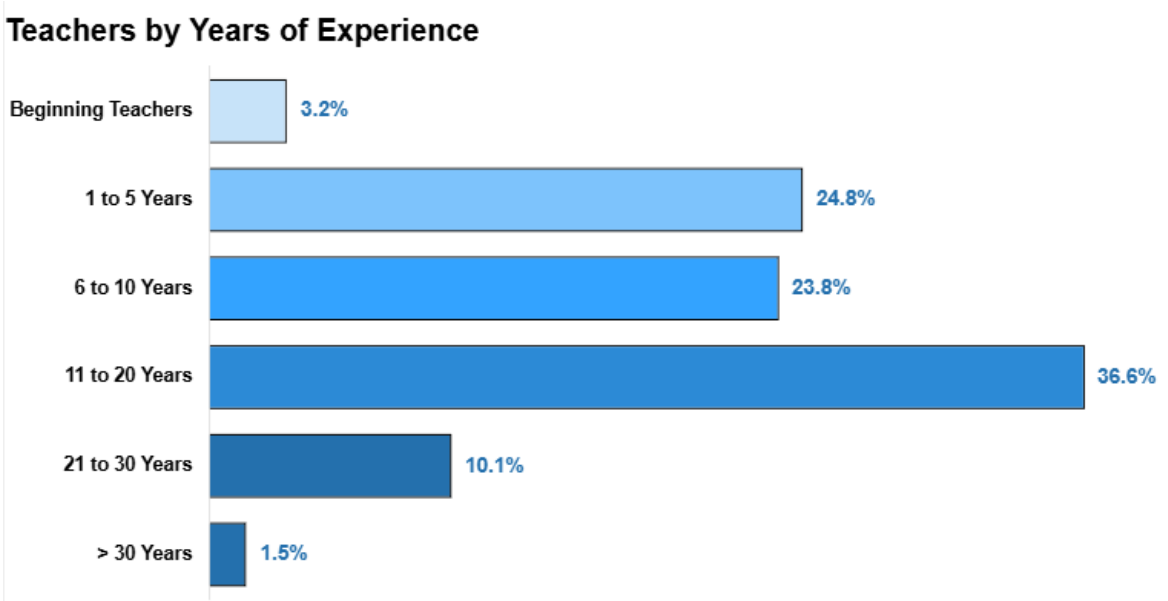
- Total student enrollment 205-2026: 10,442
- Economically Disadvantaged: 54.8%
- Special Education: 17.5%
- Emergent Bilingual: 8.2%



TEACHER DEMOGRAPHICS

- Number of Teachers per Student: 17.4
- Number of Full-Time Staff: 1278.3
- Number of Full-time Teachers: 599.1
- Average Teacher Salary: $72,285





MEDINA VALLEY ISD EST. 1959

ACCOUNTABILITY OVERVIEW

	Scaled Score	Rating	Proportion of Overall Rating
Overall	**82**	**B**	
Student Achievement	**81**	**B**	**0%**
School Progress	**82**	**B**	**70%**
Academic Growth	76	C	
Relative Performance (Eco Dis: 54.8%)	82	B	
Closing the Gaps	**83**	**B**	**30%**

DOMAIN 1: STUDENT ACHIEVEMENT

				Campus				District	
Campus #	District / Campus Name	School Type	Alt Ed	Rating	Score	Students Grades 3-12	Weight	Score	Rating
	MEDINA VALLEY ISD	All Campuses	No					81	B
163908103	CASTROVILLE EL	Elementary	No	A	90	302	3.9%	3.510	
163908104	LACOSTE EL	Elementary	No	C	74	340	4.4%	3.256	
163908107	LADERA EL	Elementary	No	C	72	453	5.9%	4.248	
163908106	LUCKEY RANCH EL	Elementary	No	C	73	447	5.8%	4.234	
163908105	POTRANCO EL	Elementary	No	B	82	486	6.3%	5.166	
163908108	SILOS EL	Elementary	No	C	70	426	5.5%	3.850	
163908043	MEDINA VALLEY LOMA ALTA MIDDLE	Middle School	No	B	83	1,232	15.9%	13.197	
163908042	MEDINA VALLEY MIDDLE	Middle School	No	C	77	1,194	15.4%	11.858	
163908001	MEDINA VALLEY H S	High School	No	B	87	2,852	36.9%	32.103	

DOMAIN 1: STUDENT ACHIEVEMENT

STAAR PERFORMANCE

STAAR Performance	Reading/Language Arts (RLA)	Mathematics	Science	Social Studies	Totals	Percentages
Total Tests	6,378	5,547	2,355	1,421	15,701	
Approaches GL or Above	5,025	4,064	1,919	1,053	12,061	77%
Meets GL or Above	3,684	2,477	1,360	727	8,248	53%
Masters GL	1,464	874	749	404	3,491	22%
Total Percentage Points						152%
Component Score						**51**

DOMAIN 1: STUDENT ACHIEVEMENT

COLLEGE, CAREER, AND MILITARY READINESS

	2025 Annual Graduates	
	Count Credit	Component Score
Total		
Total graduates	557	
Total credit for CCMR criteria	**486**	**87%**

Career		
Industry-Based Certifications (IBC)		
Earned an IBC plus Concentrator or Completer in aligned program of study	248	44.5%
Earned at least one sunsetting IBC and did not meet any other CCMR criteria	0	0.0%
Earned only a sunsetting IBC and are not included due to IBC cap*	0	0.0%
Level I or Level II Certificate		
Earned a level I or level II certificate in any workforce education area	16	2.9%
Graduate with Completed IEP and Workforce Readiness		
Received graduation type code of 04, 05, 54, or 55	13	2.3%
Military		
U.S. Armed Forces		
Enlisted in the U.S. Armed Forces	27	4.8%

College		
Texas Success Initiative (TSI) Criteria		
Met TSI criteria in both RLA and Mathematics	299	53.7%
Met TSI criteria in both RLA and Mathematics, excluding college prep courses	151	27.1%
TSI Criteria - Reading/Language Arts (RLA)		
Met TSI criteria for at least one indicator in RLA	485	87.1%
Met TSI criteria in RLA, excluding college prep courses	243	43.6%
Met TSIA assessment criteria	144	25.9%
Met ACT criteria	117	21.0%
Met SAT criteria	116	20.8%
Earned credit for a college prep course	345	61.9%
TSI Criteria - Mathematics		
Met TSI criteria for at least one indicator in Mathematics	316	56.7%
Met TSI criteria in Mathematics, excluding college prep courses	185	33.2%
Met TSIA assessment criteria	158	28.4%
Met ACT criteria	73	13.1%
Met SAT criteria	62	11.1%
Earned credit for a college prep course	146	26.2%
AP/IB Examination		
Met criterion score on an AP/IB exam in any subject	60	10.8%
Dual Course Credits		
Earned credit for at least 3 hours in RLA or Mathematics or 9 hours in any subject	266	47.8%
Associate Degree		
Earned an associate degree by August 31 immediately following high school graduation	7	1.3%
OnRamps Dual Enrollment Course		
Completed an OnRamps course and qualified for at least 3 hours of university or college credit in any subject	3	0.5%
Special Ed with Advanced Diploma Plan		
Received special education services and earned an advanced diploma	41	7.4%

DOMAIN 1: STUDENT ACHIEVEMENT

GRADUATION RATE

Graduation Rate	All Students
Class of 2025, 4-year	95.6
Class of 2024, 5-year	95.6
Class of 2023, 6-year	97.1
Annual Dropout*	
Component Score	**97.1**

DOMAIN 2: SCHOOL PROGRESS

				Academic Growth					Relative Performance						
				Campus				District	Campus				District	District	
Campus #	District / Campus Name	School Type	Alt Ed	Rating	Score	Students Grades 3-12	Weight	Score	Rating	Score	Students Grades 3-12	Weight	Score	Score	Rating
	MEDINA VALLEY ISD	All Campuses	No					76					82	82	B
163908103	CASTROVILLE EL	Elementary	No	B	88	302	3.9%	3.432	B	89	302	3.9%	3.471		
163908104	LACOSTE EL	Elementary	No	C	78	340	4.4%	3.432	C	76	340	4.4%	3.344		
163908107	LADERA EL	Elementary	No	D	69	453	5.9%	4.071	D	65	453	5.9%	3.835		
163908106	LUCKEY RANCH EL	Elementary	No	C	79	447	5.8%	4.582	C	75	447	5.8%	4.350		
163908105	POTRANCO EL	Elementary	No	C	79	486	6.3%	4.977	B	80	486	6.3%	5.040		
163908108	SILOS EL	Elementary	No	C	73	426	5.5%	4.015	D	67	426	5.5%	3.685		
163908043	MEDINA VALLEY LOMA ALTA MIDDLE	Middle School	No	B	82	1,232	15.9%	13.038	B	82	1,232	15.9%	13.038		
163908042	MEDINA VALLEY MIDDLE	Middle School	No	C	76	1,194	15.4%	11.704	B	81	1,194	15.4%	12.474		
163908001	MEDINA VALLEY H S	High School	No	C	72	2,852	36.9%	26.568	B	88	2,852	36.9%	32.472		

MEDINA VALLEY EST. 1959 ISD

DOMAIN 2A: SCHOOL PROGRESS

ACADEMIC GROWTH

School Progress: Academic Growth RLA and Math			
	Count	**Points**	**Calculated**
Annual Growth Points Earned	6,194.0	1	6,194.00
Accelerated Learning Points Earned	792	0.25	198.00
Sum of Annual Growth plus Accelerated Learning Points			6,392.00
Total Tests Evaluated			9,411
Academic Growth Score			**68**

DOMAIN 2A: SCHOOL PROGRESS

ACADEMIC GROWTH

Both Subjects

0 Points | 0.5 Points | 1 Point

Annual Growth														
	2025-26 Performance on STAAR													
	Low Did Not Meet Grade Level		High Did Not Meet Grade Level		Low Approaches Grade Level		High Approaches Grade Level		Meets Grade Level		Masters Grade Level		Total	
2024-25 Performance on STAAR	Count	Points	Count	Points	Count	Points	Count	Points	Count	Points	Count	Points	Count	Points
Low Did Not Meet Grade Level	528	0.0	312	312.0	140	140.0	59	59.0	31	31.0	3	3.0	1,073	545.0
High Did Not Meet Grade Level	315	0.0	356	178.0	282	282.0	166	166.0	107	107.0	4	4.0	1,230	737.0
Low Approaches Grade Level	82	0.0	199	0.0	254	127.0	231	231.0	255	255.0	15	15.0	1,036	628.0
High Approaches Grade Level	38	0.0	133	0.0	213	0.0	300	150.0	521	521.0	74	74.0	1,279	745.0
Meets Grade Level	18	0.0	52	0.0	142	0.0	385	0.0	1,672	1,672.0	636	636.0	2,905	2,308.0
Masters Grade Level	2	0.0	5	0.0	16	0.0	36	0.0	598	0.0	1,231	1,231.0	1,888	1,231.0
Total	983	0.0	1,057	490.0	1,047	549.0	1,177	606.0	3,184	2,586.0	1,963	1,963.0	9,411	6,194.0

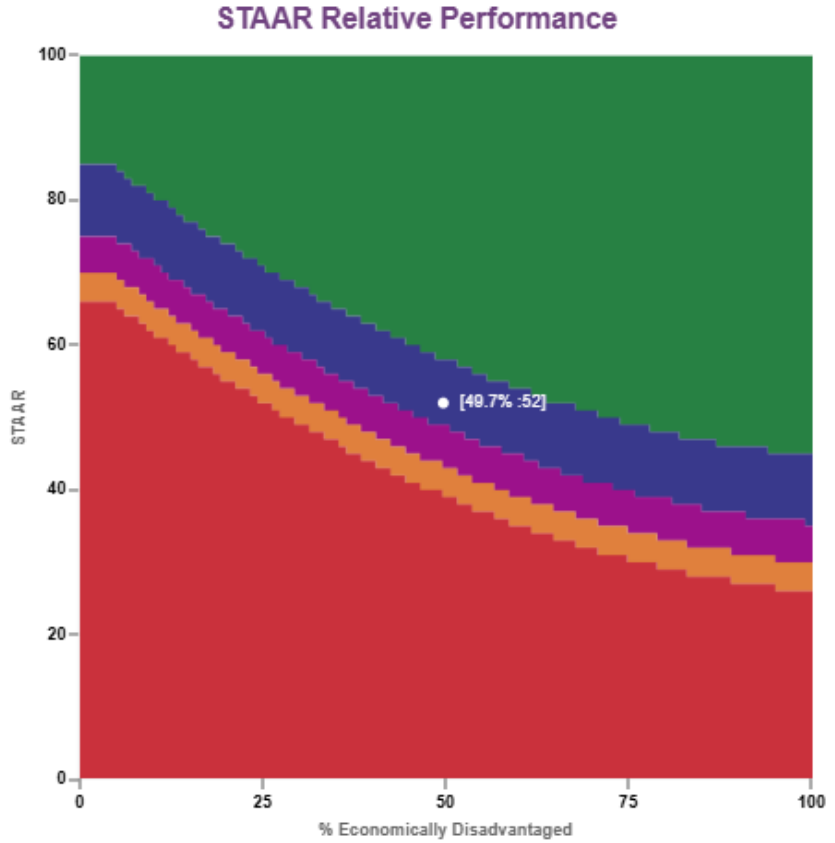
Accelerated Learning						
	2025-26 Performance on STAAR					
	Did Not Meet Grade Level	Approaches Grade Level	Meets Grade Level	Masters Grade Level	Total	
2024-25 Performance on STAAR	Count	Count	Count	Count	Count	Points
Did Not Meet Grade Level	1,511	647	138	7	2,303	792

DOMAIN 2B: SCHOOL PROGRESS

RELATIVE PERFORMANCE

Example: Loma Alta Middle School

Component	% Economically Disadvantaged	Component Score	Scaled Score
STAAR Performance	54.8%	51	
College, Career, and Military Readiness		87	
Relative Performance			**82**



The STAAR relative performance score is based on the Student Achievement STAAR score and the percent of economically disadvantaged students at a school. More information is given in the Dig Into the Data link below.

	Percent Economically Disadvantaged	Raw Score	Relative Performance Scale Score
STAAR	49.7%	52	82

DOMAIN 3: CLOSING THE GAPS

				Campus				District	
Campus #	District / Campus Name	School Type	Alt Ed	Rating	Score	Students Grades 3-12	Weight	Score	Rating
	MEDINA VALLEY ISD	All Campuses	No					83	B
163908103	CASTROVILLE EL	Elementary	No	A	92	302	3.9%	3.588	
163908104	LACOSTE EL	Elementary	No	C	70	340	4.4%	3.080	
163908107	LADERA EL	Elementary	No	C	71	453	5.9%	4.189	
163908106	LUCKEY RANCH EL	Elementary	No	C	77	447	5.8%	4.466	
163908105	POTRANCO EL	Elementary	No	C	77	486	6.3%	4.851	
163908108	SILOS EL	Elementary	No	D	69	426	5.5%	3.795	
163908043	MEDINA VALLEY LOMA ALTA MIDDLE	Middle School	No	A	92	1,232	15.9%	14.628	
163908042	MEDINA VALLEY MIDDLE	Middle School	No	C	75	1,194	15.4%	11.550	
163908001	MEDINA VALLEY H S	High School	No	A	90	2,852	36.9%	33.210	

DOMAIN 3: CLOSING THE GAPS

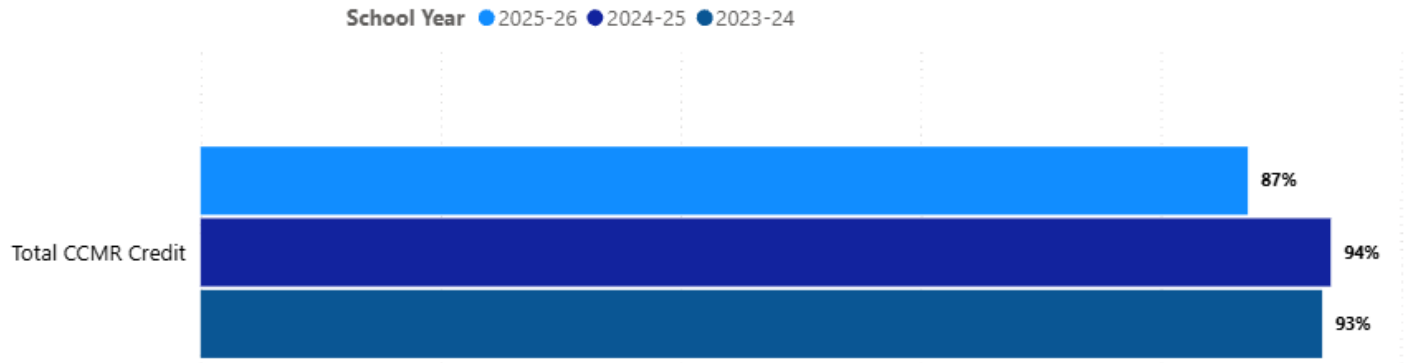
- Academic Achievement – Performance at Meets Grade Level Standard or Above
  - Reading and Language Arts
  - Mathematics
- Academic Growth Status
  - Reading and Language Arts
  - Mathematics
- Federal Graduation rate
- Progress in Achieving English Language Proficiency (EB/EL Current)
- Student Success (STAAR Component Only of Student Achievement Domain)
- School Quality (CCMR Performance)
- Participation Rate - Assessment

DOMAIN 3: CLOSING THE GAP

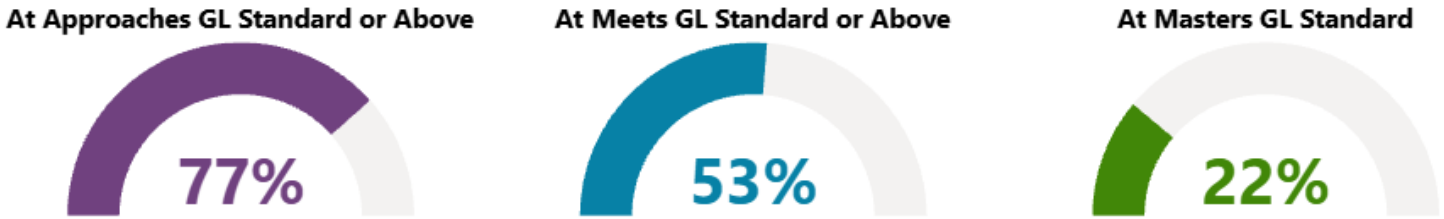
- Domain 3 is used by the State for Federal Accountability.
- Domain 3 is used for identification of Schools for Improvement.
  - No campus in MVISD was identified for:
    - Comprehensive Support and Improvement
    - Targeted Support and Improvement
    - Additional Targeted Support

AREAS OF FOCUS

- CCMR Component Score
  - 2025-2026 – 87
  - 2024-2025– 94
  - 2023-2024 – 93



- Student Achievement Component Score
  - 2025-2026 - 81
  - 2024-2025 – 82
  - 2023-2024 - 84

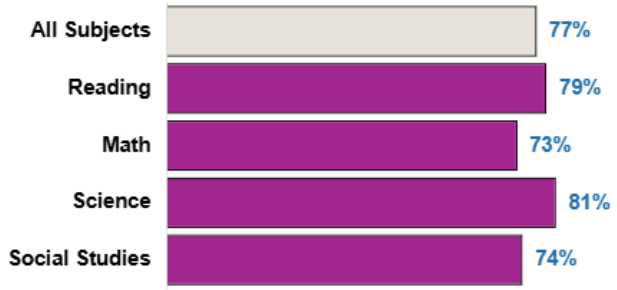


Race/Ethnicity	Tests Taken	Approaches or Above	% Approaches or Above	Meets or Above	% Meets or Above	Masters	% Masters
African American	1,263	925	73%	598	47%	257	20%
Hispanic	10,062	7,429	74%	4,797	48%	1,909	19%
White	3,280	2,794	85%	2,185	67%	1,045	32%
American Indian	37	29	78%	16	43%	6	16%
Asian	311	262	84%	200	64%	80	26%
Pacific Islander	53	46	87%	31	58%	12	23%
Two or More Races	695	576	83%	421	61%	182	26%

COMPARISON

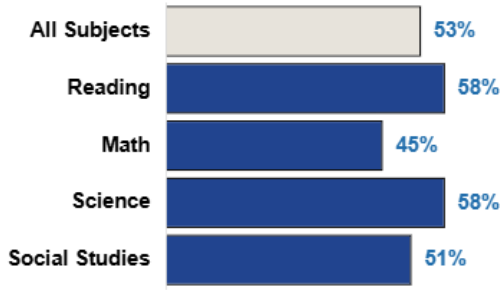
STAAR PERFORMANCE TO STATE

Percentage of Students Approaching Grade Level or Above



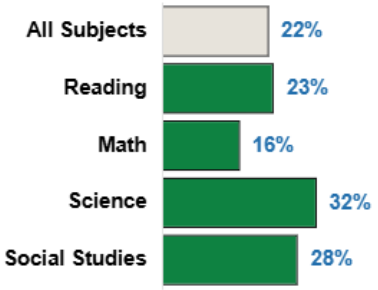
Subject	This District	State
All Subjects	77%	76%
Reading	79%	76%
Math	73%	73%
Science	81%	79%
Social Studies	74%	77%

Percentage of Students Meeting Grade Level or Above



Subject	This District	State
All Subjects	53%	52%
Reading	58%	56%
Math	45%	47%
Science	58%	54%
Social Studies	51%	52%

Percentage of Students Mastering Grade Level



Subject	This District	State
All Subjects	22%	24%
Reading	23%	24%
Math	16%	20%
Science	32%	28%
Social Studies	28%	27%

DISTINCTION DESIGNATIONS

▪ Medina Valley High School:	Top 25% Closing the Gaps
▪ Loma Alta Middle School:	Top 25% Closing the Gaps
▪ Castroville Elementary:	Academic Achievement Math
	Academic Achievement Science
	Top 25% Comparative Growth
	Postsecondary Readiness
	Top 25% Closing the Gaps
▪ Potranco Elementary:	Academic Achievement Science
▪ Luckey Ranch Elementary:	Top 25% Comparative Growth
▪ Silos Elementary:	Academic Achievement Science



Becau

se,

Agenda Item Memorandum

To: MVISD Board of Trustees
Date: Regular Monthly Board Meeting
Agenda item: Consider approval of Consent Agenda Items

Background Information and Administrative Consideration
Consent agenda items are presented to the Board as a single bundled action, requiring only one motion for approval. These typically include budgeted purchases over $50,000, annual contracts, and routine matters that require Board authorization. All consent items are thoroughly vetted by the administration and reviewed during Board Committee Meetings, and/or Board Updates.

Supporting Documents
Each item has attached supporting documents.

Recommendation
Administration recommends that the Board approves the Consent Agenda as presented.

Medina Valley Independent School District
Official Board Minutes

Regular Board Meeting
Monday, July 27, 2026, 6:00 PM
Medina Valley ISD Central Office Board Room

A **Regular Board Meeting** of the Board of Trustees was held Monday, July 27, 2026, beginning at 6:00 PM at the Medina Valley ISD Central Office Board Room.

I. **First Order of Business**

A Call Meeting to Order

Nathan Fillinger, Board President, called the Medina Valley ISD Regular Board Meeting to order at 6:00 pm on July 27, 2026.

B Establish a Quorum

A quorum of the Board Members were present Matt Castiglione, Joe Biediger, Ben Juarez, Suzanne Lee, Blane Nash and Nathan Fillinger. Kelly Van Sickle was absent. Superintendent Emily Lorenz was present.

C Pledge of Allegiance to the Flag followed by a Moment of Silence

Everyone joined in the Pledge of Allegiance to the American Flag and the Texas Flag, followed by a moment of silence.

II. **Public Comment** - none

III. **Announcements/Communications/Presentations**

A Board Committee Reports
- Construction Committee presented by Joe Biediger, Committee Chair

B Construction Briefing presented by Mr. Barajas
- Creek View High School
- Medina Valley High School Ag/JROTC Building
- Medina Valley ISD Middle School #3
- Medina Valley ISD Elementary #7

C Financial Briefing presented by Mrs. Hermesch
- General Fund Financial Statement
- Child Nutrition Financial Statement
- Debt Service Fund Financial Statement
- Bond 2023 Capital Projects Report
- Bond 2024 Capital Projects Report
- Quarterly Investment Report

D Superintendent Briefing presented by Mrs. Lorenz
- Achievements
- Upcoming Events

Unofficial Minutes-posted 7/29/26

E MVISD 2026-2027 Student Handbooks presented by Mr. Lange

F Review of MVISD's Board Policy CW (Local) Naming Facilities, and Declare Intent to name Middle School #3 and MVHS Stadium presented by Mrs. Lorenz. The Board declared their intent to begin the process to name Middle School #3 and the MVHS Stadium.

IV. Discussion and Possible Action Items

A Consider Approval of Consent Agenda Items

- Minutes for Regular Board Meeting on June 22, 2026
- Interlocal Agreement with UTRGV
- Local Policy Update 127, affecting Local Policies BJCF, CAA, DC, DH, DP, DPA, DPB, EHBB, and FFF
- T-TESS Appraisal Calendar and Appraisers
- 2026-2027 Student Code of Conduct
- CPS easement for MS #3
- Procurement for Elementary #7
- Authorization Resolution
- TCOLE MOU renewal
- Extracurricular Status of 4-H Organization
  - Medina County
  - Bexar County
- Adjunct Faculty Agreement
  - Medina County
  - Bexar County

Matt Castiglione made a Motion, seconded by Joe Biediger, to approve the Consent Agenda Items with the removal of the CPS easement as presented. All of the Board Members voted for and the Motion passed.

B Consider Approval of HB3 Board Goals and Objectives for Early Childhood Literacy and Mathematics Proficiency Plans

Matt Castiglione made a Motion, seconded by Joe Biediger, to approve the HB3 Board Goals and Objectives for Early Childhood Literacy and Mathematics Proficiency Plans as presented. All of the Board Members voted for and the Motion passed.

C Consider Approval of the 2026-2027 Employee Compensation Plan

Blane Nash made a Motion, seconded by Ben Juarez, to approve the 2026-2027 Employee Compensation Plan with a 1% midpoint increase for Teacher and returning Admin/Professional positions, and a $0.50 per hour increase for returning Clerical/Para and Manuel Trades positions as presented.

V. Closed Session

Nathan Fillinger, Board President announced at 6:51 pm that the Board of Trustees would convene in closed session as authorized by Section 551.074, 551.076, and 551.089 of the Texas Open Meetings Act to discuss agenda items V, A-B.

A Personnel Matters: Resignations, Retirements, Leaves of Absence, Reassignments, New Employment, New Personnel Position, Duties/Responsibilities of Employees (TX Govt. Code Section 551.074)

B Considering the deployment, specific occasions for, or implementation of, security personnel or devices (TX Govt. Code Section 551.076 and 551.089)

- 2026 Safety and Security Audit

Board President Nathan Fillinger announced that the Board would reconvene into Open Session on June 29, 2026 at 8:01 pm. No action took place in closed session.

VI. Continued Discussion and Possible Action Items

A Consideration of future meeting dates

The next Regular Meeting is scheduled for Tuesday, August 24, 2026.
We have a Special Meeting scheduled for August 12, 2026.

VII. Adjournment

Matt Castiglione made a Motion, seconded by Ben Juarez, to adjourn the Regular Board Meeting at 7:10 pm on July 27, 2026. All of the Board Members voted for and the Motion passed.

_____ _____

Joe Biediger
Presiding Officer/Board Secretary

Matt Castiglione
Board Member

Board Approved_____

Unofficial Minutes-posted 7/29/26

Medina Valley Independent School District
Official Minutes

Special Board Meeting Expressly for the Purpose of Considering
the Use of Unspent 2023 Bond Proceeds
Monday, July 27, 2026, 5:50 PM
Medina Valley ISD Central Office Board Room

A **Special Board Meeting Expressly for the Purpose of Considering the Use of Unspent 2023 Bond Proceeds** of the Board of Trustees was held Monday, July 27, 2026, beginning at 5:50 PM at the Medina Valley ISD Central Office Board Room.

I. **First Order of Business**

A Call Meeting to Order

Nathan Fillinger, Board President, called the Medina Valley ISD Special Board Meeting to order at 5:50 pm on July 27, 2026.

B Establish a Quorum

A quorum of the Board Members were present, Matt Castiglione, Joe Biediger, Blane Nash, Suzanne Lee, Ben Juarez, and Nathan Fillinger. Kelly Van Sickle was absent.

C Pledge of Allegiance to the Flag followed by a Moment of Silence

Everyone joined in the Pledge of Allegiance to the American Flag and the Texas Flag, followed by a moment of silence.

II. **Public Comment -** none

III. **Discussion and Possible Action Items**

A Consider Approval for the Purchase of Vehicles for the Police Department, Utilizing Bond 2023 Excess Safety Funds

Ben Juarez made a Motion, seconded by Joe Biediger, to approve the purchase of 2 vehicles for the Police Department from Lake County Chevrolet in an amount not to exceed $117,178.30 utilizing Bond 2023 Excess Safety Funds as presented.

IV. **Adjournment**

Matt Castiglione made a Motion, seconded by Ben Juarez, to adjourn the Special Board Meeting at 5:53 pm on July 27, 2026. All of the Board Members voted for and the Motion passed.

_____ _____

Joe Biediger
Presiding Officer/Board Secretary

Matt Castiglione
Board Member

Board Approved_____

Medina Valley Independent School District
Official Minutes

Special Board Meeting
Wednesday, August 12, 2026, 6:00 PM
Medina Valley ISD Central Office Board Room

A **Special Board Meeting** of the Board of Trustees was held Wednesday, August 12, 2026, beginning at 6:00 PM at the Medina Valley ISD Central Office Board Room.

I. **First Order of Business**

A Call Meeting to Order

Nathan Fillinger, Board President, called the Medina Valley ISD Special Board Meeting to order at 6:02 pm on August 12, 2026.

B Establish a Quorum

A quorum of the Board Members were present, Matt Castiglione, Joe Biediger, Blane Nash, Suzanne Lee, Ben Juarez, Kelly Van Sickle and Nathan Fillinger.

C Pledge of Allegiance to the Flag followed by a Moment of Silence

Everyone joined in the Pledge of Allegiance to the American Flag and the Texas Flag, followed by a moment of silence.

II. **Public Comment - NONE**

III. **Discussion and Possible Action Items**

A Consider Approval of the Schedule for the Medina Valley ISD 2026-2027 Public Hearing for the Budget and Tax Rates

Matt Castiglione made a Motion, seconded by Ben Juarez, to approve August 24, 2026 at 6pm for the Medina Valley ISD 2026-2027 Public Hearing for the proposed 2026-2027 Budget and Tax Rates and the maximum tax rates that can be adopted for 2026-2027 as presented.

B Consider Approval of the Superintendent's Personnel Recommendations for August 12, 2026 - There were none.

IV. **Budget Workshop**

V. **Adjournment**

Matt Castiglione made a Motion, seconded by Joe Biediger, to adjourn the Special Board Meeting at 7:14 pm on August 12, 2026. All of the Board Members voted for and the Motion passed.

_____ _____

Joe Biediger
Presiding Officer/Board Secretary

Matt Castiglione
Board Member

Board Approved_____

Agenda Item Memorandum

To: MVISD Board of Trustees
Date: August 24, 2026
Agenda item: Approval of Memorandum of Agreement (MOA) between Medina Valley Independent School District and Our Lady of the Lake University (OLLU)

Background Information: Medina Valley ISD is partnering with Our Lady of the Lake University through a self-renewing agreement to place university student interns (such as speech-language pathology students) into district schools for clinical field experience.

Funding Source: None / Non-Financial Agreement ($0.00). (Student background checks, if required, are completed at the student's expense)

Supporting Documents: Memorandum of Agreement (MOA) between Our Lady of the Lake University and Medina Valley ISD

Recommendation:
It is recommended that the Board of Trustees approve the Memorandum of Agreement with Our Lady of the Lake University as presented.

MEMORANDUM OF AGREEMENT
BETWEEN
OUR LADY OF THE LAKE UNIVERSITY
AND
MEDINA VALLEY INDEPENDENT SCHOOL DISTRICT

Whereas, Our Lady of the Lake University (hereinafter referred to as "University") and **MEDINA VALLEY INDEPENDENT SCHOOL DISTRICT** (hereinafter referred to as "Organization") desire to set out in writing the terms and respective responsibilities of the two institutions for education and training of students from Our Lady of the Lake University, located at 411 Southwest 24th St., San Antonio TX 78207-4689.

I.
Terms of the Agreement

This Memorandum of Agreement ("MOA") is self-renewing and will commence as of the date signed by both parties. The Agreement shall be continued unless either party desires to terminate the Agreement and thus gives the other party thirty (30) days written notice of intention to terminate.

II.
Expectations of Parties

The University and the Organization agree as follows:

A. University Responsibilities:

1. To send the Organization only such students who have successfully completed the requirements for the experiential component of the curriculum hereinafter referred to as the "internship."

2. To take appropriate action regarding any student whose performance record or conduct does not justify continuance in training at the Organization as determined by Organization.

3. To support rules and regulations governing students that are mutually agreed upon between the University and the Organization.

4. To assign students to training only when mutually arranged by the University and the Organization.

5. To maintain channels of communication for exchange of information with Organization personnel by on-site visits when geographically practical, or by email, virtual face-to-face visits or by telephone.

6. To ensure students have professional liability insurance while completing training assignments as evidenced by the Certificate of Insurance issued by a company licensed to do business nationally and internationally on Department of Defense jurisdictions when applicable.

7. To provide the Organization with written materials stating the policies, objectives and content of the program's training.

8. To provide a faculty member to serve as field consultant and liaison to the Organization as a University representative to work with the Organization supervisor and student on behalf of the student's learning experience.

9. To share appropriate information regarding the background, experience and educational needs of the student with the Organization prior to the students' placement.

10. To provide opportunities for the professional development of supervisors through seminars, workshops and regional meetings.

11. To prohibit the publication by the students and/or faculty of any material relative to the training that has not been approved for release for publication by the Organization and the University.

12. To inform students and the Organization of the time schedule of the internship, including beginning and ending dates of the internship.

13. To seek and use the evaluations and recommendations of Organization personnel in matters related to the internship.

14. To carry final responsibility for the administration of the internship.

15. To inform students that Organization may require them to complete a background check at student's expense prior to beginning the field instruction program.

B. Organization Responsibilities

1. To orient the students to the Organization and rules and regulations specific to the Organization, and to communicate these rules and regulations to the University through the University representative.

2. To provide opportunities for students to participate in the Organization's service programs and activities as appropriate.

3. To provide a supervisor whose qualification meets the requirements of the University as communicated by the University and as set forth in Subsection C of this Agreement. If Organization does not have a supervisor onsite who meets these qualifications, they agree to provide an onsite task supervisor who will supervise our student in conjunction with an off-site supervisor who meets the program's qualifications.

4. To safeguard the supervisor's time so that they maintain scheduled supervisory conferences with students and consult with the University's representatives.

5. To provide opportunities to the student for the purpose of reinforcing learning concerning all relevant areas of the University's curriculum.

6. To provide a suitable working area for the student during the internship.

7. To provide students with a realistic workload that supports the educational objectives of the program and the objectives of the student's learning contract or education plan.

8. To provide continuing training by the same supervisor for the duration of the student's placement, and agree that a change in supervisors requires the approval of the University's Program Director or designated representative.

9. To inform the University as soon as possible regarding changes in Organization policy, procedures, and staffing that might affect the internship.

10. To cooperate with the University in making use of Organization materials in classroom discussions and assignments. These materials must be adequately redacted to protect confidentiality.

11. To ensure that each student shall have required immunizations as designated by the Organization prior to the initiation of Student's assignment at the Organization. It is the student's responsibility to ensure they are up to date on any required immunizations and provide appropriate documentation to the Organization. If the student is not up to date on the required immunizations, it is the student's responsibility to obtain the required immunizations at their own expense.

C. Organization Supervisor Responsibilities

1. To provide training experiences in a planned and sequential manner commensurate with the student's learning capacity and pace that reinforce the knowledge and skill base in the curriculum.

2. To actively assist the students to learn processes by helping them intentionally integrate knowledge, theory and practice necessary to achieve established learning outcomes.

3. To provide a positive learning environment that fosters professional growth and autonomy, and improves the student's potential for professional practice.

4. To involve the students in ongoing processes of self-evaluation and conduct prompt performance evaluation with realistic expectations that enables students to correct deficiencies and learn from their mistakes.

5. Serve as a professional role model, providing students the opportunity to observe and model competent and ethical practice.

6. To perform administrative duties essential to the success of the training process in a timely professional manner. This includes submitting evaluations and grade recommendations according to the University's academic schedule.

7. To comply with all policies and procedures of the program.

8. To orient and integrate the students into the Organization structure and interpersonal networks, and orient the Organization staff to the students' role as learners.

9. To negotiate with each student a specific and individualized education plan that will direct the training process and serve as a tool for evaluation.

10. To provide regularly scheduled in-person supervisory conferences with the student for a minimum of one hour each week during the internship.

11. To provide a variety of cases and training experiences to insure exposure to ethnic/racial, social and economic diversity.

12. To notify the University immediately of problems which threaten the student's successful completion of the internship

13. To ensure that the required hours for internship are completed.

14. To participate in meetings related to internship sponsored by the University and the Organization.

15. To ensure that students follow the administrative policies, standards and practices of the Organization and the program.

III.
Indemnification Agreement

Each party shall be responsible for its own acts and omissions and shall be liable for payment of that portion of any and all claims, liabilities, injuries, suits and demands and expenses of all kinds that may result or arise out of any alleged malfeasance or neglect caused or alleged to have been

caused by said party, its directors, officers, employees, agents, students, faculty, and representatives in the performance or omission of any act or responsibility of said party under this Agreement. In the event that a claim is made against both parties, it is the intent of both parties to cooperate in the defense of said claim and to cause their insurers to do likewise. Both parties shall, however, retain the right to take any and all actions they believe necessary to protect their own interests.

IV.
Dispute Resolution

The Parties shall seek to resolve informally any dispute that arises between them under this Agreement. The Parties shall provide each other with written notice of any dispute arising out of this Agreement. The Parties shall submit their dispute to mediation before a mutually agreeable mediator as a pre-condition to filing a lawsuit in any court or county, whether in Justice of the Peace, County Court, or District Court. This provision, however, shall be inapplicable if the running of the statute of limitations prevents the Parties from engaging in mediation before the necessity of filing suit.

V.
Miscellaneous Provisions

5.1 The number of students participating in the internship during any given time period shall be agreed upon by the University and Organization.

5.2 The relationship of the Parties to this Agreement shall not be deemed or construed to create a joint venture, partnership or Organization relationship between the parties for any purpose.

5.3 The Parties agree that this Agreement addresses the matters covered herein and supersedes all other agreements on the same subject, whether oral or written. Any changes or amendments to this Agreement may be made only in writing and signed by both Parties.

5.4 This Agreement may be executed in several counterparts, all of which taken together shall constitute one single agreement between the parties.

5.5 The headings in this Agreement are for reference and convenience only and shall not enter into the interpretation of this Agreement.

5.6 If any provision of this Agreement is or becomes invalid or unenforceable, the remaining provisions shall continue to be effective.

5.7 Failure of the University to insist upon strict conformance of the provisions of this Agreement shall not constitute a waiver of any of the provisions of this Agreement.

5.8 This Agreement shall not be assigned without the prior written consent of the other Party.

5.9 The Parties represent and acknowledge that they have had the opportunity to review this Agreement with counsel of their choosing and are entering into this Agreement freely and voluntarily.

VI.
Nondiscrimination and Compliance

6.1 The Organization and the University commit to fostering a diverse environment that is free from discrimination. Neither Party shall discriminate against any individual on the basis of race, color, sex, pregnancy, religion, national origin, citizenship status, disability, age, marital status, gender, gender identity or expression, sexual orientation, veteran or military status (including disabled veterans, Vietnam-era veterans or recently separated veterans), predisposing genetic characteristics, domestic violence victim status, or any other protected category under applicable local, state and federal laws, including protections for those opposing discrimination or participating in any allegation process on campus. The University is committed to upholding this policy to be sure it does not violate any local, state or federal laws including but not limited to Title IX of the Educational Amendments of 1972, the Americans with Disabilities Act of 1990, Section 504 of the Rehabilitation Act of 1973, Title VII of the Civil Rights Act of 1964, as well as University policies. The parties will agree to cooperate with each other in any actions that arise out of alleged violations of these or other local, state or federal laws or University or Organization policies.

6.2 The University and its directors, officers, employees, agents, students, faculty, and representatives agree to keep strictly confidential and hold in trust all confidential information of the Organization and/or its constituents and not disclose or reveal any confidential information to any third party without the written notice to the Organization. Confidential Information shall be deemed to include the non-public personal financial information, student education records, and other protected information in accordance with the Gramm-Leach Bliley Act (and the Federal Trade Commission's implementing regulations), Family Education Rights and Privacy Act of 1974 (FERPA), and the Health Insurance Portability and Accountability Act of 1996 (HIPAA). Each party agrees to use the other party's Confidential Information solely for the purpose of the activities contemplated by this Agreement, and not to disclose such Confidential Information to any person or entity other than its own employees, agents, advisors and representatives who have a reasonable need to know the information for purposes of fulfilling their obligations. In the event that either party is required to disclose the other party's Confidential Information pursuant to applicable law or a judicial or government order, or seeks to disclose Confidential Information in connection with any litigation, alternative dispute resolution proceeding or regulatory proceeding, it may make such disclosure, but will notify the other party in advance, so as to allow the other party an opportunity to obtain a protective order or similar relief.

6.3 For purposes of this Agreement, pursuant to the Family Educational Rights and Privacy Act of 1974 (FERPA), the University hereby designates the Organization as a school official with a legitimate educational interest in the educational records of the students who participate in the program to the extent that access to the records are required by the Organization to carry out the program. Organization agrees to maintain the confidentiality of the educational records in accordance with the provisions of FERPA.

VII.
Governing Law

The validity, construction, scope and performance of this Agreement shall be governed in accordance with the laws of the State of Texas. This agreement is performable in Bexar County, Texas. Any claim relating to or arising out of this Agreement shall be brought in Bexar County, Texas

VIII.
Notices

Any notice required under this Agreement shall be in writing and shall be effective when delivered to the party for whom it is intended. Notices to University shall be delivered to the following person:

Vanessa Clark, PhD
Associate Dean of Graduate Affairs
Our Lady of the Lake University
411 S.W. 24th Street
San Antonio, Texas 78207
vgclark@ollusa.edu

Copied to: Naomi Arcos Hernandez, M.A., CCC-SLP
Director of Pediatric Field Education
Woolfolk School of Communication Sciences and Disorders

Notices to Medina Valley Independent School District shall be delivered to the following person:

Emily Lorenz
Superintendent of Schools
8449 FM 471
S. Castroville, TX 78009
(830) 521-6093 x8034
Email: emily.lorenz@mvisd.org

Executed on this the 22nd of July , 2026

Vanessa Clark, PhD
Associate Dean of Graduate Affairs
Our Lady of the Lake University

Naomi Arcos Hernandez, M.A., CCC-SLP
Director of Pediatric Field Education
Woolfolk School of Communication Sciences and Disorders
Our Lady of the Lake University

Emily Lorenz
Superintendent of Schools
Medina Valley Independent School District

Agenda Item Memorandum

To: MVISD Board of Trustees
Date: August 24, 2026
Agenda item: Approval of Memorandum of Understanding (MOU) with the Believe It Foundation for Adaptive Physical Education Programming and Adaptive Bicycles (2026–2027)

Background Information: Medina Valley ISD is partnering with the Believe It Foundation to receive gifted adaptive bicycles for inclusion programs like Partners in PE. MVISD will maintain and insure the bikes for adaptive P.E. and co-host staff training during the 2026–2027 school year.

Funding Source: N/A (Non-binding collaborative agreement; adaptive bicycles gifted at no cost to the district as funds become available)

Supporting Documents:
Memorandum of Understanding between Medina Valley ISD and Believe It Foundation

Recommendation:

- It is recommended that the Board of Trustees approve the Memorandum of Understanding with the Believe It Foundation for the 2026–2027 school year.

MEMORANDUM OF UNDERSTANDING

Dated as of 9/1/2026

between

Medina Valley ISD

and

Believe it Foundation

This **MEMORANDUM OF UNDERSTANDING** (hereinafter referred to as "**MOU**") is made and entered into by and between **v** Medina Valley ISD **Located:** 8449 FM 471 S., Castroville, TX 78009(hereinafter referred to as "Medina Valley ISD"); and, Believe it Foundation located at 4242 Broadway, #706, San Antonio, Texas, 78209 (hereinafter referred to as "**Foundation**").

WHEREAS the intent of Medina Valley ISD and FOUNDATION is to identify and agree with the commitments and obligations made by each party in this MOU.

WHEREAS Medina Valley ISD and FOUNDATION agree to collaborate, cross-promote their programs in an effort to promote inclusivity throughout Medina Valley ISD and San Antonio.

NOW THEREFORE, for and in further consideration of the matters hereafter set forth, Medina Valley ISD and FOUNDATION thereby stipulate and agree as follows:

I. Responsibilities of Medina Valley ISD and FOUNDATION

I.1. Medina Valley ISD to maintain/start a Partners In PE program, PALS or other inclusion programs and can ask for assistance from FOUNDATION

I.2. Upon establishment of inclusion programming, FOUNDATION will purchase and gift adaptive bikes (number to be determined based on number of students impacted) to Medina Valley ISD as funds are made available; Bikes will have an odometer for the purpose of gathering data on use. FOUNDATION will annually gather data to access relevant impact on a given campus and in collaboration make recommendations about use maximization.

.

I.3. Medina Valley ISD will own the bikes and will store and maintain the bikes and accessories and will carry all the relevant liability insurance.

I.4. Medina Valley ISD will use adaptive bikes on campus for adaptive P.E., bike rodeos, and for bike club meetings. A bike lending program can be implemented for use of bikes on weekends, holidays, and summer.

I.5. Medina Valley ISD and FOUNDATION to host additional bike training days throughout the 26-27 school year to promote the bikes and train users. All coaches and relevant personnel will be trained and informed about the importance and benefit of use.

II. Terms of the MOU

II.1. This MOU is entered by FOUNDATION and Medina Valley ISD in good faith for a mutually beneficial relationship to collaborate and promote inclusion throughout Medina Valley ISDand San Antonio

II.2. This MOU is not intended to create or constitute a legally binding obligation between Medina Valley ISD and FOUNDATION, but it shall, in all respects, be governed by, and construed in accordance with the laws of the State of Texas, including all matters of construction, validity and performance, without giving effect to its conflict of law provisions

III. Termination of this MOU

III.1. This MOU shall be effective as of DATE and shall continue in full force and effect until August 206 unless terminated earlier by FOUNDATION or Medina Valley ISD with a 30 days written notice should the pilot program be deemed unsuccessful.

IV. Notices and Communications

IV.1. All notices and communications stipulated in this MOU shall be sent by way of e-mail and U.S. Mail.

Medina Valley ISD
8449 FM 471 S., Castroville, TX 78009
Email: **laura.garza@mvisd.org**

BELIEVE IT FOUNDATION:
4242 Broadway #706
San Antonio, Texas, 78209
Attn: Andrew McAllister
Email: info@believeitfoundation.org

V. Amendments

V.1. The provisions of this MOU may not be waived, altered, modified, amended, supplemented or terminated in any manner whatsoever, except by a written instrument signed by FOUNDATION and Medina Valley ISD hereto.

IN WITNESS WHEREOF, the undersigned parties have caused this MOU to be duly executed, delivered and effective as of the date first above written.

Medina Valley ISD

_____
Emily Lorenz, Superintendent

BELIEVE IT FOUNDATION

_____
Andrew McAllister

Agenda Item Memorandum

To: MVISD Board of Trustees
Date: August 24, 2026
Agenda item: ~~Approval of Shared Services Agreement with NISD Regional Day School for the Deaf~~ Consent Agenda: Consider Approval for the payment for Northside ISD Services with the Regional Day School for the Deaf.

Background Information:
This Shared Services Agreement with Northside Independent School District provides Medina Valley ISD with Auditory Instruction (AI) support and resources to enhance instruction and improve operational efficiency.

Funding Source:
- Vendor**:** Northside Independent School District
- Service**:** Auditory Instruction (AI) Shared Services Agreement
- Amount**:** $63,859.00
- Funding **Source:** 224 E 11 6219 06 830 6 23 0 00

Supporting Documents:
- Shared Services Agreement with Northside Independent School District
- Vendor Quote/Cost Summary ($63,859.00)

Recommendation: Administration recommends approval of a Shared Services Agreement (SSA) with Northside Independent School District for $63,859.00**.**

Northside Independent School District

INVOICE

5900 Evers Road
San Antonio, Texas 78238
Phone 210.397.8545 Fax 210.706.8912

Date: June 3, 2026
Invoice: 5075
For Internal Use Only: 5749.05

Bill To:
Medina Valley ISD (276)
Special Education Department
8449 FM 471 South
Castroville, Texas 78009

Date Serviced	Item	Description	Amount
08/11/25 - 12/19/25	AI Shared Services Agreement	Services for L. Clinkscales	12,780.86
01/6/26 - 05/21/26	AI Shared Services Agreement	Services for L. Clinkscales	12,345.14
08/11/25 - 12/19/25	AI Shared Services Agreement	Services for V. Garcia	19,702.34
01/6/26 - 05/21/26	AI Shared Services Agreement	Services for V. Garcia	19,030.66
		TOTAL	63,859.00
			-
		BALANCE DUE	63,859.00

PLEASE MAKE CHECKS PAYABLE TO Northside I.S.D.
If you have any questions, please contact Ricardo Fonseca @ 397-8813
Note your invoice number on the payment, thank you.

Mail To: Northside I.S.D.
Office of Accounting
5900 Evers Road
San Antonio, TX 78238

Agenda Item Memorandum

To: MVISD Board of Trustees
Date: August 24, 2026
Agenda item: Consider Approval of Procurement Method for the Medina Valley High School HVAC Replacement Project.

Background Information
The Board previously approved MEP Engineers to provide the engineering services for the Medina Valley High School HVAC Replacement Project. MEP Engineers are in the process of completing the construction drawings and specifications for this project.

Administrative Consideration
District staff and MEP engineers have been working together to identify the design needs for the HVAC replacement project and agree that the request for sealed proposal for Construction Manager-At-Risk (CMAR) offers the best value to the district.

The RFP for the construction manager at risk will include the following:

- Invitation & instruction to offerors
- Construction documents
- Selection criteria
- Estimated budget
- Project scope
- Schedule
- Other information necessary for contractors to respond

The district will evaluate and rank each proposal based upon published selection criteria and shall select the offeror that offers the best value for the district based on the published selection criteria and on its ranking evaluation.

Funding Source:
NA

Recommendation:
It is recommended the Board approve the request for sealed proposals for Construction Manager-At-Risk (CMAR) as the procurement method for the Medina Valley High School HVAC Replacement Project.

Agenda Item Memorandum

To: MVISD Board of Trustees
Date: August 24, 2026
Agenda item: Consider approval to pay Bexar County Fire Marshal's permit fees for the Medina Valley ISD Elementary School #7 Project

Background Information
The Bexar County Fire Marshal's Office is the authority having jurisdiction for the Medina Valley ISD Elementary School #7 project. As part of the construction building permit authorization for Bexar Country, a commercial permit is required.

Administrative Consideration
Fees have been provided to district staff and design team by the Bexar County Fire Marshal's Office for all structures.

- Main Building $134,756.14

Recommendation:
It is recommended that the Board approve to pay the Bexar County Fire Marshal's permit fees for the Medina Valley ISD Elementary School #7 project in the amount of $134,756.14.

2024 Single Commercial Permit Fee Estimator

Enter the Cost of the Building Project:	$ 47,500,000.00	**Total Permit Fee:**	**$ 149,729.04**
Public School Discount:	$ 14,972.90	School Permit Fee:	$ 134,756.14
If you received a Notice of Violation, your permit fee is:			**$ 299,458.08**

Plan Review Fees

From	Up To	Review Base Fee		Administrative Fee	Total
$ -	$ 6,250.00	$ -			$ -
$ 6,250.01	$ 12,500.00	$ -	+	$ -	$ -
$ 12,500.01	$ 25,000.00	$ -	+	$ -	$ -
$ 25,000.01	$ 50,000.00	$ -	+	$ -	$ -
$ 50,000.01	$ 150,000.00	$ -	+	$ -	$ -
$ 150,000.01	$ 300,000.00	$ -	+	$ -	$ -
$ 300,000.01	$ 600,000.00	$ -	+	$ -	$ -
$ 600,000.01	$ 1,200,000.00	$ -	+	$ -	$ -
$ 1,200,000.01	$ 2,400,000.00	$ -	+	$ -	$ -
$ 2,400,000.01	$ 4,800,000.00	$ -	+	$ -	$ -
$ 4,800,000.01	$ 9,600,000.00	$ -	+	$ -	$ -
$ 9,600,000.01	$ 19,200,000.00	$ -	+	$ -	$ -
$ 19,200,000.01	$ 38,400,000.00	$ -	+	$ -	$ -
$ 38,400,000.01	$ 76,800,000.00	$ 53,625.33	+	$ 1,820.00	$ 55,445.33
$ 76,800,000.01	Over	$ -	+	$ -	$ -

Permit and Inspection Fees

From	Up To	Permit Base Fee		Inspection(s) Fee	Total
$ -	$ 6,250.00	$ -			$ -
$ 6,250.01	$ 12,500.00	$ -	+	$ -	$ -
$ 12,500.01	$ 25,000.00	$ -	+	$ -	$ -
$ 25,000.01	$ 50,000.00	$ -	+	$ -	$ -
$ 50,000.01	$ 150,000.00	$ -	+	$ -	$ -
$ 150,000.01	$ 300,000.00	$ -	+	$ -	$ -
$ 300,000.01	$ 600,000.00	$ -	+	$ -	$ -
$ 600,000.01	$ 1,200,000.00	$ -	+	$ -	$ -
$ 1,200,000.01	$ 2,400,000.00	$ -	+	$ -	$ -
$ 2,400,000.01	$ 4,800,000.00	$ -	+	$ -	$ -
$ 4,800,000.01	$ 9,600,000.00	$ -	+	$ -	$ -
$ 9,600,000.01	$ 19,200,000.00	$ -	+	$ -	$ -
$ 19,200,000.01	$ 38,400,000.00	$ -	+	$ -	$ -
$ 38,400,000.01	$ 76,800,000.00	$ 59,608.05	+	$ 28,028.00	$ 87,636.05
$ 76,800,000.01	Over	$ -	+	$ -	$ -

Final Inspection and Certificate of Occupancy Fee	$ 200.00
Technology Improvement Fee	$ 6,447.66

Agenda Item Memorandum

To: MVISD Board of Trustees
Date: August 24, 2026
Agenda item: Consider approval of the 2026 Investment Policy and Investment Strategies Review Resolution

Background Information
Board policy CDA (Legal) states "the board shall review its investment policy and investment strategies not less than annually. The board shall adopt a written instrument by rule, order, ordinance, or resolution stating that it has reviewed the investment policy and investment strategies and that the written instrument so adopted shall record any changes made to either the investment policy or investment strategies" per Gov't Code 2256.005(e).

Administrative Consideration
Administration is not recommending any changes to the district's investment policy or investment strategies. CDA (Local) was updated in March 2025.

Supporting Documents
- 2026 Investment Policy and Investment Strategies Review Resolution
- Board policy CDA (Local)

Recommendation:
Administration recommends that the Board approve the 2026 Investment Policy and Investment Strategies Review Resolution with no changes to Board policy CDA (Local).

RESOLUTION STATING THE REVIEW OF THE INVESTMENT POLICY AND INVESTMENT STRATEGIES OF MEDINA VALLEY INDEPENDENT SCHOOL DISTRICT

WHEREAS, Medina Valley Independent School District (the "District") has been legally created and operates pursuant to the general laws of the State of Texas applicable to independent school districts; and

WHEREAS, the Board of Trustees has convened on this date at a meeting open to the public as required by law, and wishes to adopt an Investment Policy for the District, in the form attached hereto and pursuant to Chapter 2256, Texas Government Code, as amended from time to time.

NOW THEREFORE, BE IT RESOLVED BY THE BOARD OF TRUSTEES OF THE MEDINA VALLEY INDEPENDENT SCHOOL DISTRICT THAT:

The Investment Policy and Investment Strategies in the form attached hereto has hereby been reviewed.

PASSED AND APPROVED this 24th day of August 2026.

_____
Joe Biediger
Presiding Officer, MVISD Board of Trustees Secretary

ATTEST:

_____
Matt Castiglione
MVISD Board of Trustees

(SEAL)

Investment Authority

The Superintendent or other person designated by Board resolution shall serve as the investment officer of the District and shall invest District funds as directed by the Board and in accordance with the District's written investment policy and generally accepted accounting procedures. All investment transactions except investment pool funds and mutual funds shall be settled on a delivery versus payment basis.

Approved Investment Instruments

From those investments authorized by law and described further in CDA(LEGAL) under Authorized Investments, the Board shall permit investment of District funds, including bond proceeds and pledged revenue to the extent allowed by law, in only the following investment types, consistent with the strategies and maturities defined in this policy:

1. Obligations of, or guaranteed by, governmental entities as permitted by Government Code 2256.009.
2. Certificates of deposit and share certificates as permitted by Government Code 2256.010.
3. Fully collateralized repurchase agreements permitted by Government Code 2256.011.
4. A securities lending program as permitted by Government Code 2256.0115.
5. Banker's acceptances as permitted by Government Code 2256.012.
6. Commercial paper as permitted by Government Code 2256.013.
7. No-load mutual funds, except for bond proceeds, and no-load money market mutual funds, as permitted by Government Code 2256.014.
8. A guaranteed investment contract as an investment vehicle for bond proceeds, provided it meets the criteria and eligibility requirements established by Government Code 2256.015.
9. Public funds investment pools as permitted by Government Code 2256.016.

Safety

The primary goal of the investment program is to ensure safety of principal, to maintain liquidity, and to maximize financial returns within current market conditions in accordance with this policy. Investments shall be made in a manner that ensures the preservation of capital in the overall portfolio, and offsets during a 12-month period any market price losses resulting from interest-rate fluctuations by income received from the balance of the portfolio. No indi-

vidual investment transaction shall be undertaken that jeopardizes the total capital position of the overall portfolio.

Investment Management

In accordance with Government Code 2256.005(b)(3), the quality and capability of investment management for District funds shall be in accordance with the standard of care, investment training, and other requirements set forth in Government Code Chapter 2256.

Liquidity and Maturity

Any internally created pool fund group of the District shall have a maximum dollar weighted maturity of 180 days. The maximum allowable stated maturity of any other individual investment owned by the District shall not exceed one year from the time of purchase. The Board may specifically authorize a longer maturity for a given investment, within legal limits.

The District's investment portfolio shall have sufficient liquidity to meet anticipated cash flow requirements.

Diversity

The investment portfolio shall be diversified in terms of investment instruments, maturity scheduling, and financial institutions to reduce risk of loss resulting from overconcentration of assets in a specific class of investments, specific maturity, or specific issuer.

Monitoring Market Prices

The investment officer shall monitor the investment portfolio and shall keep the Board informed of significant changes in the market value of the District's investment portfolio. Information sources may include financial/investment publications and electronic media, available software for tracking investments, depository banks, commercial or investment banks, financial advisers, and representatives/advisers of investment pools or money market funds. Monitoring shall be done at least quarterly, as required by law, and more often as economic conditions warrant by using appropriate reports, indices, or benchmarks for the type of investment.

Monitoring Rating Changes

In accordance with Government Code 2256.005(b), the investment officer shall develop a procedure to monitor changes in investment ratings and to liquidate investments that do not maintain satisfactory ratings.

Funds/Strategies

Investments of the following fund categories shall be consistent with this policy and in accordance with the applicable strategy defined below. All strategies described below for the investment of a particular fund should be based on an understanding of the suitability of an investment to the financial requirements of the District and consider preservation and safety of principal, liquidity, marketability of an investment if the need arises to liquidate before maturity, diversification of the investment portfolio, and yield.

Operating Funds

Investment strategies for operating funds (including any commingled pools containing operating funds) shall have as their primary

	objectives preservation and safety of principal, investment liquidity, and maturity sufficient to meet anticipated cash flow requirements.
Custodial Funds	Investment strategies for custodial funds shall have as their primary objectives preservation and safety of principal, investment liquidity, and maturity sufficient to meet anticipated cash flow requirements.
Debt Service Funds	Investment strategies for debt service funds shall have as their primary objective sufficient investment liquidity to timely meet debt service payment obligations in accordance with provisions in the bond documents. Maturities longer than one year are authorized provided legal limits are not exceeded.
Capital Project Funds	Investment strategies for capital project funds shall have as their primary objective sufficient investment liquidity to timely meet capital project obligations. Maturities longer than one year are authorized provided legal limits are not exceeded.
Safekeeping and Custody	The District shall retain clearly marked receipts providing proof of the District's ownership. The District may delegate, however, to an investment pool the authority to hold legal title as custodian of investments purchased with District funds by the investment pool.
Sellers of Investments	Prior to handling investments on behalf of the District, a broker/dealer or a qualified representative of a business organization must submit required written documents in accordance with law. [See Sellers of Investments, CDA(LEGAL)] Representatives of brokers/dealers and representatives with distributors of investment pools shall be registered with the Texas State Securities Board and must have membership in the Securities Investor Protection Corporation (SIPC) and be in good standing with the Financial Industry Regulatory Authority (FINRA). Distributors of investment pools shall also be a registrant in good standing with the Municipal Securities Rulemaking Board (MSRB).
Soliciting Bids for CDs	In order to get the best return on its investments, the District may solicit bids for certificates of deposit in writing, by telephone, or electronically, or by a combination of these methods.
Interest Rate Risk	To reduce exposure to changes in interest rates that could adversely affect the value of investments, the District shall use final and weighted-average-maturity limits and diversification. The District shall monitor interest rate risk using weighted average maturity and specific identification.
Internal Controls	A system of internal controls shall be established and documented in writing and must include specific procedures designating who

has authority to withdraw funds. Also, they shall be designed to protect against losses of public funds arising from fraud, employee error, misrepresentation by third parties, unanticipated changes in financial markets, or imprudent actions by employees and officers of the District. Controls deemed most important shall include:

1. Separation of transaction authority from accounting and recordkeeping and electronic transfer of funds.
2. Avoidance of collusion.
3. Custodial safekeeping.
4. Clear delegation of authority.
5. Written confirmation of telephone transactions.
6. Documentation of dealer questionnaires, quotations and bids, evaluations, transactions, and rationale.
7. Avoidance of bearer-form securities.

These controls shall be reviewed by the District's independent auditing firm.

Annual Review

The Board shall review this investment policy and investment strategies not less than annually and shall document its review in writing, which shall include whether any changes were made to either the investment policy or investment strategies.

Annual Audit

In conjunction with the annual financial audit, the District shall perform a compliance audit of management controls on investments and adherence to the District's established investment policies.

Agenda Item Memorandum

To: MVISD Board of Trustees
Date: August 24, 2026
Agenda item: Consider approval of Annual Review Investment Training

Background Information:
Board policy CDA and the Public Funds Investment Act of Texas Government Code 2256.008 require annual approval of investment officer training from independent sources. Each investment officer is required to attend 8 hours of training per a two-year period. This training shall include education in investment controls, security risks, strategy risks, market risks, diversification of investment portfolio, and compliance with the Government Code, Chapter 2256 from an independent source approved by the board.

Administrative Consideration:

- Administration recommends that the Board of Trustees consider approval of the following independent sources for investment training: Region XIII, Region XX, Texas Association of School Business Officials (TASBO), Texas Association of School Boards (TASB), Linda Patterson & Associates, Government Finance Officers Association (GFOA), Texas State University, University of North Texas, Tex-Pool, and PFM Asset Management LLC.

Supporting Documents:

- Investment Officer Training certificates

Recommendation:
It is recommended that the Board consider approval of the independent sources for investment training as presented.

TEXAS STATE®

DISTANCE AND
EXTENDED LEARNING

CERTIFICATE OF COMPLETION

10 Hours
Awarded to
Crystal Hermesch

For the satisfactory completion of organized instruction in:

Public Funds Investment Act Training

Awarded by Texas State University's Office of Distance & Extended Learning



Course Instructor

May 9, 2025
Date Completed

ESC 20
Serving the Educational Community

Certificate Of Training

This Certifies That

Jennifer Garcia

Has Attended

Workshop Title	Start Date	End Date	Hours
Investment Officer Training - Day 1 - 4/23/2025	**April 23, 2025**	**April 23, 2025**	**Clock Hours 6 Of 6 CPE - TEA Provider #015950 6 Of 6**

Credit Type: Clock Hours 6, CPE - TEA Provider #015950 6

Provider # 015-950



Certificate Of Training

This Certifies That

Jennifer Garcia

Has Attended

Workshop Title	Start Date	End Date	Hours
Investment Officer Training-Spring Day 1	**April 22, 2026**	**April 22, 2026**	**CEU 6 Of 6** **Clock Hours 6 Of 6** **CPE - TEA Provider #015950 6 Of 6**

Credit Type: CEU 6, Clock Hours 6, CPE - TEA Provider #015950 6

Provider # 015-950

Agenda Item Memorandum

To: MVISD Board of Trustees
Date: August 24, 2026
Agenda item: Consider approval of the District's list of Qualified Investment Brokers

Background Information
Board policy CDA (Legal) states "The Board or the designated investment committee shall, at least annually, review, revise, and adopt a list of qualified brokers that are authorized to engage in investment transactions with a district" per Gov't Code 2256.025.

Administrative Consideration
Administration has reviewed the current list of approved investment brokers with the district's financial advisor and recommends no changes.

Supporting Documents
- List of Qualified Investment Brokers for 2026-2027

Recommendation:
Administration recommends that the Board approve the District's list of Qualified Investment Brokers as presented.

Qualified Investment Brokers
as of August 2026

Dealer	Contact	Phone	Email
Bank of America	John Vanderwilt	415-953-2621	john.a.vanderwilt@baml.com
BOKF	Gautham Metta	972-892-9963	gautham.metta@bokf.com
Cabrera Capital*	Mario Carrasco	210-857-8517	mcarrasco@cabreracapital.com
Cantor Fitzgerald	James Shamoun Jr	901-347-1724	jshamoun@cantor.com
Fidelity	Michael O'Donnell	817-474-0100	michael.odonnell@fmr.com
First Horizon Financial	Buddy Saragusa	713-435-4475	bsaragusa@bloomberg.net
Goldman Sachs	Daniel Hopton	212-357-9892	daniel.hopton@gs.com
Hilltop Securities	Gil Ramon	713-654-8606	gilbert.ramon@hilltopsecurities.com
JP Morgan	Brittany Guinee	212-834-5718	brittany.guinee@jpmorgan.com
Morgan Stanley	Peter Lambert	214-468-7232	peter.lambert@ms.com
Multi-Bank Securities*	Luigi Mancini	800-967-9049	lmancini@mbssecurities.com
Oppenheimer	Javier Altimari	713-650-2025	javier.altimari@opco.com
Piper Sandler	Matt McGrory	312-267-5168	matt.mcgrory@psc.com
RBC	Thomas Kelly	212-847-8748	thomas.kelly@rbc.com
Stifel Nicolaus	Brian Conlon	617-753-6303	conlonb@stifel.com
TD Ameritrade	Jason Gregg	800-355-2297	jason.gregg@tdameritrade.com
UBS Bank	Phil Hartigan	214-382-2210	philip.hartigan@ubs.com
UMB Bank	Jeffrey Duchin	214-389-5927	Jeffrey.Duchin@umb.com
Wells Fargo	Susan Ward	214-740-1586	wardst@wellsfargo.com
Broadway Bank	Heather J. Hepp, CTP	210-413-8233	hhepp@broadway.bank

Agenda Item Memorandum

To: MVISD Board of Trustees
Date: August 24, 2026
Agenda item: Consider approval for the participation between Medina Valley ISD and the attached Purchasing Cooperatives for 2026-2027

Background Information:
Purchasing Cooperatives bid out services, supplies, and materials used by School Districts, Cities, and Counties on an annual basis. The use of Purchasing Cooperatives provides services and products that meet the competitively bid requirements and saves the school district time and money by purchasing from vendors who also participate in the cooperative. *Gov't Code 791.001, .011, .025.* A listing of each cooperative entity is enclosed.

Additionally, House Bill 273 requires school districts to disclose the amounts spent on purchasing cooperative fees on an annual basis. Education Code Sec. 44.0331 states: "The amount, purpose, and disposition of any fee described by Subsection (a) must be presented in a written report and submitted annually in an open meeting of the Board of Trustees of the school district." The written report must appear as an action agenda item.

There is no cost to the District for participating with eleven of the fourteen cooperatives. The annual fee for participation with the TxSmartBuy System and TXMAS is $100.00, payable to the State Controller's Office. The annual fees for participation in the Region 20 Purchasing Cooperatives (to include PACE and Texas 20) are $875.00 for General Purchasing and $772.00 for Educational Technology. The Annual fee for participation with CTPA, Central Texas Purchasing Alliance, is $150.00, payable to Round Rock ISD.

Administrative Consideration:
Administration requests that the Board of Trustees approve the continued use of purchasing cooperatives listed for the 2026-2027 fiscal year.

Supporting Documents:
- List of Medina Valley ISD Purchasing Cooperatives

Recommendation:
It is recommended that the Board consider approval to continue using purchasing cooperatives listed for the 2026-2027 fiscal year.

Purchasing Cooperatives Interlocal Agreements

In order to comply with Texas Purchasing Law, supplies and/or services used by school districts in certain categories that exceed the aggregated amount of $100,000 threshold, have to be competitively requested using one of the approved methods. In some instances, the approved method preferred is to use awarded and approved vendors, as listed below, instead of request for proposal for certain categories such as library and instructional supplies among others. We encourage vendors to contact these organizations if they wish information on how to become an approved and awarded vendor through these organizations to open the door for additional opportunities to conduct business with the District.

COOPERATIVE	CONTACT INFORMATION
1GPA 1Government Procurement Alliance	1910 W. Washington St. Phoenix, AZ 85009 866-306-3893 https://www.1GPA.org
BuyBoard Purchasing Cooperative	PO Box 400, Austin TX 78767-0400 800-695-2919 https://www.buyboard.com
Choice Partners HCDE/CP	6005 Westview Drive, Houston TX 77055 877-696-2122 https://www.choicepartners.org
CTPA Central Texas Purchasing Alliance	16255 Great Oaks Drive, Round Rock TX 78681 512-464-6953 https://www.txctpa.org
DIR Department of Information Resources	300 West 15th Street, Suite 1300, Austin TX 78701 512-475-4700 https://dir.texas.gov
Education Service Center Region 2 **Goodbuy**	209 North Water Street, Corpus Christi, TX 78401 361-561-8400 https://www.esc2.net/apps/pages/goodbuy

Education Service Center Region 19 **Allied States Cooperative**	6611 Boeing Drive, El Paso TX 79925 915-780-1919 https://www.esc19.net
Education Service Center Region 20 **Region 20 Cooperative, PACE,** **Texas 20 Purchasing Cooperative**	1314 Hines Ave, San Antonio TX 78208 210-370-5200 https://texas20.esc20.net
Equalis Group	5540 Granite Pkwy. Ste 200, Plano, TX 75024 844-289-6728 https://equalisgroup.org/
GSA US General Service Administration	819 Taylor Street, Fort Worth TX 76102 817-978-2321 https://www.gsa.gov
HGACBuy Houston-Galveston Area Council Cooperative Purchasing Program	PO Box 22777, Houston TX 77227-2777 800-926-0234 https://hgacbuy.org
OMNIA Partners US Communities National IPA	5001 Aspen Grove Drive, Franklin TN 37067 866-875-3299 https://www.omniapartners.com
Sourcewell	202 12th Street NE, Staples MN 56479 877-585-9706 https://www.sourcewell-mn.gov
TIPS Texas Interlocal Purchasing System	4845 US Highway 271 North, Pittsburg TX 75686 866-839-8477 https://tips-usa.com
TxSmartBuy Systems and **TXMAS** Texas Multiple Award Schedule Texas Comptroller of Public Accounts Programs	1711 San Jacinto, Austin TX 78701 512-463-3368 https://txsmartbuy.com https://comptroller.texas.gov/purchasing/contracts/txmas/

Agenda Item Memorandum

To: MVISD Board of Trustees
Date: August 24, 2026
Agenda item: Accept the Certified Appraisal Rolls for Medina Valley Independent School District

Background Information:
The Chief Appraisers of the Medina County and Bexar County Appraisal Districts have certified and submitted the appraisal roll as approved by their respective Appraisal Review Boards, for calendar year beginning January 1, 2026 and ending December 31, 2026, and has delivered to Melissa Lutz, Tax Assessor-Collector for the Medina Valley Independent School District, a statement of the total amount of appraised, assessed, and taxable value of property as of January 1, 2026.

Also included is the value for properties under protest at the time of submission for the assessment rolls lying within the Medina Valley Independent School District.

These values are used to determine the tax rates and budgets for the 2026-2027 fiscal year.

Administrative Consideration:

- Certified property values as of July 25 are $6,678,669,685. This is a 7.13% increase over last year's certified values.
- With the combination of increases to the Homestead Exemption as well as increases in commercial property in Medina County, the district is currently made up of 58% residential and 42% commercial property as compared to 56% residential and 44% commercial for 2025.
- These values were submitted to TEA prior to August 1. Under House Bill 3, the growth in certified values from 2025 to 2026 was used to calculate the Tier I portion of the M&O tax rate to ensure that the district does not exceed a 2.5% increase in revenue at the local level. In addition, districts must have tax rates within 90% of each other. The Tier I tax rate approved by the TEA for 2026-2027 is $0.5766.
- The Tier I tax rate of $0.5766 plus the Tier II tax rate of $0.05 makes up the total M&O tax rate of $0.6266. The I&S tax rate will remain at $0.50 to meet current debt obligations.

Supporting Documents:

- Medina County and Bexar County Certified Appraisal Rolls
- Property Value History worksheet

Recommendation:
It is recommended that the Board accept the certified appraisal roll for tax year 2026 for Medina Valley ISD as presented.


MEDINA VALLEY
EST.
ISD
1959

Land	Value
Homesite:	559,606,903
Non Homesite:	529,206,340
Ag Market:	1,022,417,272
Timber Market:	0

Improvement	Value
Homesite:	2,265,955,014
Non Homesite:	860,609,556

Non Real	Count	Value
Personal Property:	840	697,224,560
Mineral Property:	95	4,447,060
Autos:	0	0

Ag	Non Exempt	Exempt
Total Productivity Market:	1,021,953,042	464,230
Ag Use:	23,050,895	6,320
Timber Use:	0	0
Productivity Loss:	998,902,147	457,910

Total Land	(+)	2,111,230,515
Total Improvements	(+)	3,126,564,570
Total Non Real	(+)	701,671,620
Market Value	=	5,939,466,705
Productivity Loss	(-)	998,902,147
Appraised Value	=	4,940,564,558
Homestead Cap	(-)	43,374,771
23.231 Cap	(-)	35,919,091
Assessed Value	=	4,861,270,696
Total Exemptions Amount (Breakdown on Next Page)	(-)	1,610,100,206
Net Taxable	=	3,251,170,490

Freeze	Assessed	Taxable	Actual Tax	Ceiling	Count
DP	23,546,804	7,511,664	62,318.77	88,382.87	118
OV65	694,601,343	266,505,791	1,910,053.09	2,284,371.95	2,396
Total	718,148,147	274,017,455	1,972,371.86	2,372,754.82	2,514
Tax Rate	1.1527000				

Freeze Taxable	(-)	274,017,455

Transfer	Assessed	Taxable	Post % Taxable	Adjustment	Count
OV65	1,398,470	515,225	147,190	368,035	5
Total	1,398,470	515,225	147,190	368,035	5

Transfer Adjustment	(-)	368,035
Freeze Adjusted Taxable	=	2,976,785,000

APPROXIMATE LEVY = (FREEZE ADJUSTED TAXABLE * (TAX RATE / 100)) + ACTUAL TAX
36,285,772.56 = 2,976,785,000 * (1.1527000 / 100) + 1,972,371.86

Certified Estimate of Market Value:	5,939,466,705
Certified Estimate of Taxable Value:	3,251,170,490
Tax Increment Finance Value:	0
Tax Increment Finance Levy:	0.00

Exemption Breakdown

Exemption	Count	Local	State	Total
145B	528	0	19,325,840	19,325,840
145D	191	0	3,740,920	3,740,920
145D1	38	0	2,314,760	2,314,760
145F	24	0	1,125,500	1,125,500
DP	140	0	3,770,048	3,770,048
DV1	79	0	565,631	565,631
DV1S	1	0	5,000	5,000
DV2	82	0	551,119	551,119
DV2S	5	0	22,500	22,500
DV3	129	0	1,015,052	1,015,052
DV4	464	0	4,128,208	4,128,208
DV4S	8	0	48,000	48,000
DVHS	1,370	0	459,257,343	459,257,343
DVHSS	19	0	3,631,448	3,631,448
EX	195	0	13,517,453	13,517,453
EX-XG	1	0	555,350	555,350
EX-XI	6	0	580,640	580,640
EX-XV	231	0	44,005,350	44,005,350
EX-XV (Prorated)	2	0	184,095	184,095
EX366	30	0	4,060	4,060
HS	7,633	0	948,119,139	948,119,139
MASSS	1	0	481,070	481,070
OV65	2,695	0	102,524,690	102,524,690
OV65S	3	0	157,475	157,475
SO	14	469,515	0	469,515
	Totals	**469,515**	**1,609,630,691**	**1,610,100,206**

Land	Value
Homesite:	2,772,693
Non Homesite:	8,132,238
Ag Market:	4,857,220
Timber Market:	0

Improvement	Value
Homesite:	16,144,332
Non Homesite:	14,902,530

Non Real	Count	Value
Personal Property:	0	0
Mineral Property:	0	0
Autos:	0	0

Ag	Non Exempt	Exempt
Total Productivity Market:	4,857,220	0
Ag Use:	106,340	0
Timber Use:	0	0
Productivity Loss:	4,750,880	0

Total Land	(+)	15,762,151
Total Improvements	(+)	31,046,862
Total Non Real	(+)	0
Market Value	=	46,809,013
Productivity Loss	(-)	4,750,880
Appraised Value	=	42,058,133
Homestead Cap	(-)	105,614
23.231 Cap	(-)	117,740
Assessed Value	=	41,834,779
Total Exemptions Amount (Breakdown on Next Page)	(-)	5,516,119
Net Taxable	=	36,318,660

Freeze	Assessed	Taxable	Actual Tax	Ceiling	Count
OV65	3,950,892	2,550,892	21,681.19	23,670.60	7
Total	3,950,892	2,550,892	21,681.19	23,670.60	7
Tax Rate	1.1527000				

Freeze Taxable	(-)	2,550,892
Freeze Adjusted Taxable	=	33,767,768

APPROXIMATE LEVY = (FREEZE ADJUSTED TAXABLE * (TAX RATE / 100)) + ACTUAL TAX
410,922.25 = 33,767,768 * (1.1527000 / 100) + 21,681.19

Certified Estimate of Market Value:	42,978,780
Certified Estimate of Taxable Value:	33,507,129
Tax Increment Finance Value:	0
Tax Increment Finance Levy:	0.00

Exemption Breakdown

Exemption	Count	Local	State	Total
DV4	2	0	24,000	24,000
DVHS	2	0	130,350	130,350
HS	38	0	4,941,769	4,941,769
OV65	8	0	420,000	420,000
	Totals	**0**	**5,516,119**	**5,516,119**

Land	Value
Homesite:	562,379,596
Non Homesite:	537,338,578
Ag Market:	1,027,274,492
Timber Market:	0

Improvement	Value
Homesite:	2,282,099,346
Non Homesite:	875,512,086

Non Real	Count	Value
Personal Property:	840	697,224,560
Mineral Property:	95	4,447,060
Autos:	0	0

Ag	Non Exempt	Exempt
Total Productivity Market:	1,026,810,262	464,230
Ag Use:	23,157,235	6,320
Timber Use:	0	0
Productivity Loss:	1,003,653,027	457,910

Total Land	(+)	2,126,992,666
Total Improvements	(+)	3,157,611,432
Total Non Real	(+)	701,671,620
Market Value	=	5,986,275,718
Productivity Loss	(-)	1,003,653,027
Appraised Value	=	4,982,622,691
Homestead Cap	(-)	43,480,385
23.231 Cap	(-)	36,036,831
Assessed Value	=	4,903,105,475
Total Exemptions Amount (Breakdown on Next Page)	(-)	1,615,616,325
Net Taxable	=	3,287,489,150

Freeze	Assessed	Taxable	Actual Tax	Ceiling	Count
DP	23,546,804	7,511,664	62,318.77	88,382.87	118
OV65	698,552,235	269,056,683	1,931,734.28	2,308,042.55	2,403
Total	722,099,039	276,568,347	1,994,053.05	2,396,425.42	2,521
Tax Rate	1.1527000				

Transfer	Assessed	Taxable	Post % Taxable	Adjustment	Count
OV65	1,398,470	515,225	147,190	368,035	5
Total	1,398,470	515,225	147,190	368,035	5

Freeze Taxable	(-)	276,568,347
Transfer Adjustment	(-)	368,035
Freeze Adjusted Taxable	=	3,010,552,768

APPROXIMATE LEVY = (FREEZE ADJUSTED TAXABLE * (TAX RATE / 100)) + ACTUAL TAX
36,696,694.81 = 3,010,552,768 * (1.1527000 / 100) + 1,994,053.05

Certified Estimate of Market Value:	5,982,445,485
Certified Estimate of Taxable Value:	3,284,677,619
Tax Increment Finance Value:	0
Tax Increment Finance Levy:	0.00

Exemption Breakdown

Exemption	Count	Local	State	Total
145B	528	0	19,325,840	19,325,840
145D	191	0	3,740,920	3,740,920
145D1	38	0	2,314,760	2,314,760
145F	24	0	1,125,500	1,125,500
DP	140	0	3,770,048	3,770,048
DV1	79	0	565,631	565,631
DV1S	1	0	5,000	5,000
DV2	82	0	551,119	551,119
DV2S	5	0	22,500	22,500
DV3	129	0	1,015,052	1,015,052
DV4	466	0	4,152,208	4,152,208
DV4S	8	0	48,000	48,000
DVHS	1,372	0	459,387,693	459,387,693
DVHSS	19	0	3,631,448	3,631,448
EX	195	0	13,517,453	13,517,453
EX-XG	1	0	555,350	555,350
EX-XI	6	0	580,640	580,640
EX-XV	231	0	44,005,350	44,005,350
EX-XV (Prorated)	2	0	184,095	184,095
EX366	30	0	4,060	4,060
HS	7,671	0	953,060,908	953,060,908
MASSS	1	0	481,070	481,070
OV65	2,703	0	102,944,690	102,944,690
OV65S	3	0	157,475	157,475
SO	14	469,515	0	469,515
	Totals	**469,515**	**1,615,146,810**	**1,615,616,325**

New Value

TOTAL NEW VALUE MARKET:	**$333,640,014**
TOTAL NEW VALUE TAXABLE:	**$259,575,827**

New Exemptions

Exemption	Description	Count		
EX-XG	11.184 Primarily performing charitable functio	1	2025 Market Value	$0
EX-XV	Other Exemptions (including public property, r	4	2025 Market Value	$297,220
EX366	HB366 Exempt	7	2025 Market Value	$9,630
	ABSOLUTE EXEMPTIONS VALUE LOSS			**$306,850**

Exemption	Description	Count	Exemption Amount
145B	11.145 (b) Single Situs, Single Owner	453	$13,126,700
145D	11.145 (d) Multiple Situs, Leases	179	$3,654,390
145D1	11.145 (d-1) Multiple Situs, Consignment	10	$293,500
145F	11.145 (f) Single Situs, Related Business Entity	18	$875,500
DP	Disability	3	$25,400
DV1	Disabled Veterans 10% - 29%	5	$29,504
DV2	Disabled Veterans 30% - 49%	5	$37,500
DV3	Disabled Veterans 50% - 69%	12	$116,923
DV4	Disabled Veterans 70% - 100%	65	$721,287
DV4S	Disabled Veterans Surviving Spouse 70% - 100	1	$12,000
DVHS	Disabled Veteran Homestead	122	$29,838,093
HS	Homestead	345	$38,903,950
OV65	Over 65	157	$6,246,458
	PARTIAL EXEMPTIONS VALUE LOSS	**1,375**	**$93,881,205**
		NEW EXEMPTIONS VALUE LOSS	**$94,188,055**

Increased Exemptions

Exemption	Description	Count	Increased Exemption Amount
	INCREASED EXEMPTIONS VALUE LOSS		

TOTAL EXEMPTIONS VALUE LOSS	**$94,188,055**

New Ag / Timber Exemptions

New Annexations

New Deannexations

Average Homestead Value

Category A and E

Count of HS Residences	Average Market	Average HS Exemption	Average Taxable
7,432	$358,916	$131,993	$226,923

Category A Only

Count of HS Residences	Average Market	Average HS Exemption	Average Taxable
6,774	$359,672	$131,957	$227,715

Median Homestead Value

Category A and E

Count of HS Residences	Median Market	Median HS Exemption	Median Taxable
7,432	$323,365	$140,000	$183,365

Category A Only

Count of HS Residences	Median Market	Median HS Exemption	Median Taxable
6,774	$323,054	$140,000	$183,054

Lower Value Used

Count of Protested Properties	Total Market Value	Total Value Used
93	$46,809,013	$33,507,129

Uncontested Value

Count of Uncontested Properties	Total Market Value	Total Uncontested Value

Land	Value
Homesite:	874,333,421
Non Homesite:	458,454,776
Ag Market:	283,568,606
Timber Market:	0

Improvement	Value
Homesite:	3,182,310,944
Non Homesite:	394,451,467

Non Real	Count	Value
Personal Property:	239	68,986,214
Mineral Property:	0	0
Autos:	0	0

Ag	Non Exempt	Exempt
Total Productivity Market:	283,568,606	0
Ag Use:	1,036,446	0
Timber Use:	0	0
Productivity Loss:	282,532,160	0

Total Land	(+)	1,616,356,803
Total Improvements	(+)	3,576,762,411
Total Non Real	(+)	68,986,214
Market Value	=	5,262,105,428
Productivity Loss	(-)	282,532,160
Appraised Value	=	4,979,573,268
Homestead Cap	(-)	27,235,436
23.231 Cap	(-)	11,999,976
Assessed Value	=	4,940,337,856
Total Exemptions Amount (Breakdown on Next Page)	(-)	1,750,026,974
Net Taxable	=	3,190,310,882

Freeze	Assessed	Taxable	Actual Tax	Ceiling	Count
DP	21,109,436	4,938,481	31,035.84	39,172.79	81
OV65	265,024,885	78,494,988	493,094.77	567,035.24	908
Total	286,134,321	83,433,469	524,130.61	606,208.03	989
Tax Rate	1.1527000				

Freeze Taxable	(-)	83,433,469
Freeze Adjusted Taxable	=	3,106,877,413

APPROXIMATE LEVY = (FREEZE ADJUSTED TAXABLE * (TAX RATE / 100)) + ACTUAL TAX
36,337,106.55 = 3,106,877,413 * (1.1527000 / 100) + 524,130.61

Calculated Estimate of Market Value:	5,262,105,428
Calculated Estimate of Taxable Value:	3,190,310,882

Tax Increment Finance Value:	0
Tax Increment Finance Levy:	0.00

Exemption Breakdown

Exemption	Count	Local	State	Total
145B	200	0	10,639,600	10,639,600
145D	8	0	625,000	625,000
145D1	25	0	401,330	401,330
145F	6	0	375,000	375,000
DP	88	0	4,728,390	4,728,390
DV1	34	0	179,000	179,000
DV1S	6	0	25,000	25,000
DV2	42	0	315,000	315,000
DV2S	2	0	15,000	15,000
DV3	95	0	890,000	890,000
DV3S	4	0	40,000	40,000
DV4	877	0	5,489,670	5,489,670
DV4S	30	0	192,000	192,000
DVHS	1,492	0	292,358,759	292,358,759
DVHSS	21	0	2,712,101	2,712,101
EX-XI	1	0	0	0
EX-XJ	1	0	0	0
EX-XU	6	0	628,526	628,526
EX-XV	70	0	139,186,016	139,186,016
HS	8,894	0	1,215,647,427	1,215,647,427
LVE	19	23,022,870	0	23,022,870
MASSS	3	0	447,289	447,289
OV65	1,025	0	52,066,808	52,066,808
OV65S	4	0	42,188	42,188
	Totals	**23,022,870**	**1,727,004,104**	**1,750,026,974**

Land	Value
Homesite:	63,112,478
Non Homesite:	3,660,220
Ag Market:	7,293,426
Timber Market:	0

Improvement	Value
Homesite:	223,726,672
Non Homesite:	243,371

Non Real	Count	Value
Personal Property:	5	344,019
Mineral Property:	0	0
Autos:	0	0

Ag	Non Exempt	Exempt
Total Productivity Market:	7,293,426	0
Ag Use:	10,370	0
Timber Use:	0	0
Productivity Loss:	7,283,056	0

Total Land	(+)	74,066,124
Total Improvements	(+)	223,970,043
Total Non Real	(+)	344,019
Market Value	=	298,380,186
Productivity Loss	(-)	7,283,056
Appraised Value	=	291,097,130
Homestead Cap	(-)	713,667
23.231 Cap	(-)	132,841
Assessed Value	=	290,250,622
Total Exemptions Amount (Breakdown on Next Page)	(-)	89,380,969
Net Taxable	=	200,869,653

Freeze	Assessed	Taxable	Actual Tax	Ceiling	Count
DP	754,302	165,410	642.52	642.52	3
DPS	260,000	120,000	658.88	658.88	1
OV65	18,231,261	6,191,538	48,536.86	53,672.03	60
Total	19,245,563	6,476,948	49,838.26	54,973.43	64

Tax Rate 1.1527000

Freeze Taxable	(-)	6,476,948
Freeze Adjusted Taxable	=	194,392,705

APPROXIMATE LEVY = (FREEZE ADJUSTED TAXABLE * (TAX RATE / 100)) + ACTUAL TAX
2,290,602.97 = 194,392,705 * (1.1527000 / 100) + 49,838.26

Calculated Estimate of Market Value:	280,316,122
Calculated Estimate of Taxable Value:	185,131,632
Tax Increment Finance Value:	0
Tax Increment Finance Levy:	0.00

Exemption Breakdown

Exemption	Count	Local	State	Total
145B	5	0	275,190	275,190
DP	3	0	156,892	156,892
DPS	1	0	0	0
DV1	3	0	15,000	15,000
DV2	4	0	30,000	30,000
DV3	5	0	40,000	40,000
DV3S	1	0	10,000	10,000
DV4	43	0	432,000	432,000
DVHS	12	0	1,856,546	1,856,546
HS	596	0	82,550,801	82,550,801
LVE	1	0	0	0
OV65	69	0	4,014,540	4,014,540
	Totals	**0**	**89,380,969**	**89,380,969**

Land	Value
Homesite:	937,445,899
Non Homesite:	462,114,996
Ag Market:	290,862,032
Timber Market:	0

Improvement	Value
Homesite:	3,406,037,616
Non Homesite:	394,694,838

Non Real	Count	Value
Personal Property:	244	69,330,233
Mineral Property:	0	0
Autos:	0	0

Ag	Non Exempt	Exempt
Total Productivity Market:	290,862,032	0
Ag Use:	1,046,816	0
Timber Use:	0	0
Productivity Loss:	289,815,216	0

Total Land	(+)	1,690,422,927
Total Improvements	(+)	3,800,732,454
Total Non Real	(+)	69,330,233
Market Value	=	5,560,485,614
Productivity Loss	(-)	289,815,216
Appraised Value	=	5,270,670,398
Homestead Cap	(-)	27,949,103
23.231 Cap	(-)	12,132,817
Assessed Value	=	5,230,588,478
Total Exemptions Amount (Breakdown on Next Page)	(-)	1,839,407,943
Net Taxable	=	3,391,180,535

Freeze	Assessed	Taxable	Actual Tax	Ceiling	Count
DP	21,863,738	5,103,891	31,678.36	39,815.31	84
DPS	260,000	120,000	658.88	658.88	1
OV65	283,256,146	84,686,526	541,631.63	620,707.27	968
Total	305,379,884	89,910,417	573,968.87	661,181.46	1,053
Tax Rate	1.1527000				

Freeze Taxable	(-)	89,910,417
Freeze Adjusted Taxable	=	3,301,270,118

APPROXIMATE LEVY = (FREEZE ADJUSTED TAXABLE * (TAX RATE / 100)) + ACTUAL TAX
38,627,709.52 = 3,301,270,118 * (1.1527000 / 100) + 573,968.87

Calculated Estimate of Market Value:	5,542,421,550
Calculated Estimate of Taxable Value:	3,375,442,514
Tax Increment Finance Value:	0
Tax Increment Finance Levy:	0.00

Exemption Breakdown

Exemption	Count	Local	State	Total
145B	205	0	10,914,790	10,914,790
145D	8	0	625,000	625,000
145D1	25	0	401,330	401,330
145F	6	0	375,000	375,000
DP	91	0	4,885,282	4,885,282
DPS	1	0	0	0
DV1	37	0	194,000	194,000
DV1S	6	0	25,000	25,000
DV2	46	0	345,000	345,000
DV2S	2	0	15,000	15,000
DV3	100	0	930,000	930,000
DV3S	5	0	50,000	50,000
DV4	920	0	5,921,670	5,921,670
DV4S	30	0	192,000	192,000
DVHS	1,504	0	294,215,305	294,215,305
DVHSS	21	0	2,712,101	2,712,101
EX-XI	1	0	0	0
EX-XJ	1	0	0	0
EX-XU	6	0	628,526	628,526
EX-XV	70	0	139,186,016	139,186,016
HS	9,490	0	1,298,198,228	1,298,198,228
LVE	20	23,022,870	0	23,022,870
MASSS	3	0	447,289	447,289
OV65	1,094	0	56,081,348	56,081,348
OV65S	4	0	42,188	42,188
	Totals	**23,022,870**	**1,816,385,073**	**1,839,407,943**

State Category Breakdown

State Code	Description	Count	Acres	New Value	Market Value	Taxable Value
A	SINGLE FAMILY RESIDENCE	13,719	2,520.1596	$324,240,240	$3,884,080,207	$2,313,086,962
B	MULTIFAMILY RESIDENCE	8	107.9122	$30,014,660	$229,134,960	$229,134,960
C1	VACANT LOTS AND LAND TRACTS	870	1,291.0587	$0	$61,912,880	$59,201,715
D1	QUALIFIED OPEN-SPACE LAND	158	9,029.9100	$0	$283,568,606	$1,036,250
D2	IMPROVEMENTS ON QUALIFIED OP	28		$0	$574,955	$575,151
E	RURAL LAND, NON QUALIFIED OPE	222	3,259.0350	$40,760	$203,957,726	$189,365,022
ERROR		4		$290,520	$402,840	$266,441
F1	COMMERCIAL REAL PROPERTY	152	722.8932	$28,782,270	$128,141,212	$123,243,450
F2	INDUSTRIAL AND MANUFACTURIN	4	72.1720	$138,180	$11,187,150	$11,187,150
J1	WATER SYSTEMS	2		$0	$173,000	$0
J2	GAS DISTRIBUTION SYSTEM	3		$0	$2,996,800	$2,871,800
J4	TELEPHONE COMPANY (INCLUDI	1		$0	$309,164	$184,164
J6	PIPELINE COMPANY	21		$0	$7,090,570	$6,840,570
J8	OTHER TYPE OF UTILITY	2		$0	$25,960	$0
L1	COMMERCIAL PERSONAL PROPE	192		$675,100	$25,375,205	$15,458,730
L2	INDUSTRIAL AND MANUFACTURIN	16		$0	$9,240,115	$7,934,555
M1	TANGIBLE OTHER PERSONAL, MOB	213		$738,640	$10,311,120	$7,250,240
O	RESIDENTIAL INVENTORY	3,888	543.6586	$90,322,980	$240,638,746	$222,646,857
S	SPECIAL INVENTORY TAX	1		$0	$146,800	$26,865
X	TOTALLY EXEMPT PROPERTY	88	644.1479	$29,293,000	$162,837,412	$0
	Totals		18,190.9472	$504,536,350	$5,262,105,428	$3,190,310,882

State Category Breakdown

State Code	Description	Count	Acres	New Value	Market Value	Taxable Value
A	SINGLE FAMILY RESIDENCE	1,017	151.6545	$9,551,520	$279,651,507	$190,547,222
C1	VACANT LOTS AND LAND TRACTS	12	11.7853	$0	$460,320	$460,320
D1	QUALIFIED OPEN-SPACE LAND	10	124.0498	$0	$7,293,426	$10,370
D2	IMPROVEMENTS ON QUALIFIED OP	3		$0	$47,554	$47,554
E	RURAL LAND, NON QUALIFIED OPE	18	119.8403	$0	$5,416,130	$4,998,638
L1	COMMERCIAL PERSONAL PROPE	5		$0	$344,019	$68,829
M1	TANGIBLE OTHER PERSONAL, MOB	4		$77,350	$407,670	$89,200
O	RESIDENTIAL INVENTORY	24	3.2290	$3,656,210	$4,759,560	$4,647,520
	Totals		410.5589	$13,285,080	$298,380,186	$200,869,653

State Category Breakdown

State Code	Description	Count	Acres	New Value	Market Value	Taxable Value
A	SINGLE FAMILY RESIDENCE	14,736	2,671.8141	$333,791,760	$4,163,731,714	$2,503,634,184
B	MULTIFAMILY RESIDENCE	8	107.9122	$30,014,660	$229,134,960	$229,134,960
C1	VACANT LOTS AND LAND TRACTS	882	1,302.8440	$0	$62,373,200	$59,662,035
D1	QUALIFIED OPEN-SPACE LAND	168	9,153.9598	$0	$290,862,032	$1,046,620
D2	IMPROVEMENTS ON QUALIFIED OP	31		$0	$622,509	$622,705
E	RURAL LAND, NON QUALIFIED OPE	240	3,378.8753	$40,760	$209,373,856	$194,363,660
ERROR		4		$290,520	$402,840	$266,441
F1	COMMERCIAL REAL PROPERTY	152	722.8932	$28,782,270	$128,141,212	$123,243,450
F2	INDUSTRIAL AND MANUFACTURIN	4	72.1720	$138,180	$11,187,150	$11,187,150
J1	WATER SYSTEMS	2		$0	$173,000	$0
J2	GAS DISTRIBUTION SYSTEM	3		$0	$2,996,800	$2,871,800
J4	TELEPHONE COMPANY (INCLUDI	1		$0	$309,164	$184,164
J6	PIPELINE COMPANY	21		$0	$7,090,570	$6,840,570
J8	OTHER TYPE OF UTILITY	2		$0	$25,960	$0
L1	COMMERCIAL PERSONAL PROPE	197		$675,100	$25,719,224	$15,527,559
L2	INDUSTRIAL AND MANUFACTURIN	16		$0	$9,240,115	$7,934,555
M1	TANGIBLE OTHER PERSONAL, MOB	217		$815,990	$10,718,790	$7,339,440
O	RESIDENTIAL INVENTORY	3,912	546.8876	$93,979,190	$245,398,306	$227,294,377
S	SPECIAL INVENTORY TAX	1		$0	$146,800	$26,865
X	TOTALLY EXEMPT PROPERTY	88	644.1479	$29,293,000	$162,837,412	$0
	Totals	18,601.5061		$517,821,430	$5,560,485,614	$3,391,180,535

New Value

TOTAL NEW VALUE MARKET:	**$517,821,430**
TOTAL NEW VALUE TAXABLE:	**$397,918,518**

New Exemptions

Exemption	Description	Count		
EX-XV	Other Exemptions (including public property, r	3	2025 Market Value	$1,635,150
	ABSOLUTE EXEMPTIONS VALUE LOSS			**$1,635,150**

Exemption	Description	Count	Exemption Amount
145B	11.145 (b) Single Situs, Single Owner	205	$10,914,790
145D	11.145 (d) Multiple Situs, Leases	8	$625,000
145D1	11.145 (d-1) Multiple Situs, Consignment	25	$401,330
145F	11.145 (f) Single Situs, Related Business Entity	6	$375,000
DP	DISABILITY	6	$340,140
DV1	Disabled Veterans 10% - 29%	4	$20,000
DV2	Disabled Veterans 30% - 49%	6	$45,000
DV3	Disabled Veterans 50% - 69%	3	$30,000
DV3S	Disabled Veterans Surviving Spouse 50% - 69%	1	$10,000
DV4	Disabled Veterans 70% - 100%	61	$588,000
DVHS	Disabled Veteran Homestead	60	$10,960,487
HS	HOMESTEAD	170	$15,870,772
MASSS	Member Armed Services Surviving Spouse	1	$169,650
OV65	OVER 65	114	$6,069,501
	PARTIAL EXEMPTIONS VALUE LOSS	**670**	**$46,419,670**
		NEW EXEMPTIONS VALUE LOSS	**$48,054,820**

Increased Exemptions

Exemption	Description	Count	Increased Exemption Amount
	INCREASED EXEMPTIONS VALUE LOSS		
		TOTAL EXEMPTIONS VALUE LOSS	**$48,054,820**

New Ag / Timber Exemptions

New Annexations

New Deannexations

Average Homestead Value

Category A and E

Count of HS Residences	Average Market	Average HS Exemption	Average Taxable
9,306	$297,893	$141,013	$156,880

Category A Only

Count of HS Residences	Average Market	Average HS Exemption	Average Taxable
9,253	$297,071	$140,791	$156,280

Median Homestead Value

Category A and E

Count of HS Residences	Median Market	Median HS Exemption	Median Taxable
9,306	$285,000	$140,000	$145,000

Category A Only

Count of HS Residences	Median Market	Median HS Exemption	Median Taxable
9,253	$285,000	$140,000	$145,000

Lower Value Used

Count of Protested Properties	Total Market Value	Total Value Used
1,089	$298,380,186	$185,175,045

Uncontested Value

Count of Uncontested Properties	Total Market Value	Total Uncontested Value

2026 Preliminary Values - 140K

6.6.2026	Residential	% of Total	Commercial	% of Total	Other (Ag)	% of Total	Total	Levy	Frozen Levy Loss	Net Tax Levy	% Taxable Value Increase	New Market Value	New Taxable Value
Bexar County	2,739,116,870	78%	776,768,556	22%	1,368,461	0%	3,517,253,887	39,625,382	446,229	39,179,153	8.14%	518,999,680	417,041,090
Medina County	1,254,798,326	38%	1,984,064,127	61%	23,409,935	1%	3,262,272,388	36,752,761	1,141,426	35,611,335	14.61%	284,644,260	222,392,446
Medina Valley ISD	**3,993,915,196**	**59%**	**2,760,832,683**	**41%**	**24,778,396**	**0%**	**6,779,526,275**	**76,378,143**	**1,587,655**	**74,790,488**	**11.16%**	**803,643,940**	**639,433,536**
						Less Protest	(271,181,051)						
						M&O	6,508,345,224	42,480,512	(883,033)	41,597,479			
						I&S	6,508,345,224	33,897,631	(704,622)	33,193,009			

2026 Certified Values

	Residential	% of Total	Commercial	% of Total	Other (Ag)	% of Total	Total	Levy	Frozen Levy Loss	Net Tax Levy	% Taxable Value Increase	New Market Value	New Taxable Value
Bexar County	2,628,257,131	78%	761,876,588	22%	1,046,816	0%	3,391,180,535	38,205,040	438,962	37,766,078	6.06%	517,821,430	397,918,518
Medina County	1,240,382,232	38%	2,023,485,453	62%	23,621,465	1%	3,287,489,150	37,036,853	1,125,912	35,910,941	8.25%	333,640,014	259,575,827
Medina Valley ISD	**3,868,639,363**	**58%**	**2,785,362,041**	**42%**	**24,668,281**	**0%**	**6,678,669,685**	**75,241,893**	**1,564,874**	**73,677,019**	**7.13%**	**851,461,444**	**657,494,345**
						Less Protest (30% of Under Review)	(71,156,494)						
						M&O	6,607,513,191	41,848,544	(870,362)	40,978,182			
						I&S	6,607,513,191	33,393,348	(694,512)	32,698,837			

Agenda Item Memorandum

To: MVISD Board of Trustees
Date: August 24, 2026
Agenda item: Consider approval of the No-New-Revenue and Voter-Approval Tax Rates for Tax Year 2026 for the Medina Valley Independent School District

Background Information:
Section 26.04 of the Property Tax Code requires that the no-new-revenue tax rate and the voter-approval tax rate be submitted to the Board of Trustees by the designated officer or employee.

- **This year's no-new-revenue tax rate** (formerly referred to as the effective tax rate) would impose the same total taxes as last year if applied to properties taxed in both years, less improvements made to those properties. It does not account for impacts in state aid or recapture that would occur if the rate was adopted.

- **This year's voter-approval tax rate** (formerly referred to as the rollback tax rate) is the highest tax rate the school district can set before it must hold a voter-approval tax rate election (VATRE) or exercise its authority under Sec. 26.042(e).

- **Rate to Maintain Same Level of M&O Revenue and Pay Debt Service** — The M&O component reflects the rate needed to generate the same level of per-student funding as the prior year under the Texas Education Code Chapter 48/49 equalization formulas. The I&S component reflects the minimum rate required to meet all outstanding debt service obligations for the current year.

Administrative Consideration:
The rates below are given per $100 of property value.

This year's no-new-revenue tax rate:	**$1.1324 /$100**
This year's voter-approval tax rate:	**$1.1266 /$100**
For maintenance and operations (M&O)	$0.6266 /$100
For interest and sinking (I&S)	$0.5000 /$100
Rate to Maintain Same Level of M&O Revenue & Pay Debt service:	**$1.1354/$100**
For maintenance and operations (M&O):	$0.6320/$100
For interest and sinking (I&S):	$0.5034/$100

Supporting Documents:
- 2026 Tax Rate Calculation Worksheet

Recommendation:

8449 FM 471 S., Castroville, TX 78009 • www.mvisd.com

Administration recommends that the Board receive this as an informational item only. No board action is required.

8449 FM 471 S., Castroville, TX 78009 • www.mvisd.com

2026 Tax Rate Calculation Worksheet

Form 50-859

School Districts without Chapter 313 and JETI Agreements

Medina Valley Independent School District	(830) 931-2243
School District's Name	Phone *(area code and number)*
8449 FM 471 S, Castroville, TX, 78009	https://www.mvisd.com/
School District's Address, City, State, ZIP Code	School District's Website Address

GENERAL INFORMATION: Tax Code Section 26.04(c) requires an officer or employee designated by the governing body to calculate the no-new-revenue tax rate and voter-approval tax rate for the taxing unit. These tax rates are expressed in dollars per $100 of taxable value calculated. The calculation process starts after the chief appraiser delivers to the taxing unit the certified appraisal roll or certified estimate of value and the estimated values of properties under protest.The designated officer or employee shall submit the rates to the governing body by August 7 or as soon thereafter as practicable. Tax Code Section 26.04(e-1) does not require school districts to certify tax rate calculations or comply with certain Tax Code notice requirements. School districts are required to provide notice regarding tax rate calculations pursuant to Education Code Chapter 44.

This worksheet is for **school districts without Tax Code Chapter 313 or Government Code Chapter 403, Subchapter T, Texas Jobs, Energy, Technology, and Innovation Act (JETI) agreements only.** School districts that have a Chapter 313 or JETI agreement should use Comptroller Form 50-884 *Tax Rate Calculation Worksheet, School Districts with Chapter 313 and JETI Agreements.*

Water districts as defined under Water Code Section 49.001(1) do not use this form. Use Comptroller Form 50-858 *Water District Voter-Approval Tax Rate Worksheet for Low Tax Rate and Developing Districts* or Comptroller Form 50-860 *Developed Water District Voter-Approval Tax Rate Worksheet.*

All other taxing units should use Comptroller Form 50-856 *Tax Rate Calculation, Taxing Units Other Than School Districts or Water Districts*.

The Comptroller's office provides this worksheet to assist taxing units in determining tax rates. The Texas Education Agency (TEA) provides detailed information on and guidance to school districts in calculating their tax rates. Please review and rely on information provided by TEA when completing this worksheet. Additionally, the information provided in this worksheet is offered as technical assistance and not legal advice. Taxing units should consult legal counsel for interpretations of law regarding tax rate preparation and adoption.

Taxing units must include a hyperlink to a document that evidences the accuracy of each entry in the worksheet other than an entry making a mathematical calculation. [1] Source materials must contain data for all worksheets used.

Insert hyperlink:

Source Documents — click to view index

SECTION 1: No-New-Revenue Tax Rate

The no-new-revenue (NNR) tax rate enables the public to evaluate the relationship between taxes for the prior year and for the current year based on a tax rate that would produce the same amount of revenue if applied to the same properties that are taxed in both years (no new taxes). When appraisal values increase, the NNR tax rate should decrease.

Line	No-New-Revenue Tax Rate Worksheet	Amount/Rate
1.	**Prior year total taxable value.** Enter the amount of the prior year taxable value on the prior year tax roll today. Include any adjustments since last year's certification; exclude one-fourth and one-third over-appraisal corrections made under Tax Code Section 25.25(d) from these adjustments. Exclude any property value subject to an appeal under Chapter 42 as of July 25 (will add undisputed value in Line 6). This total includes the taxable value of homesteads with tax ceilings (will deduct in Line 2). [2]	$ 5,950,528,528 Source
2.	**Prior year tax ceilings.** Enter the prior year total taxable value of homesteads with tax ceilings. These include the homesteads of homeowners age 65 or older or disabled. [3]	$ 345,669,569 Source
3.	**Preliminary prior year adjusted taxable value.** Subtract Line 2 from Line 1.	$ 5,604,858,959
4.	**Prior year total adopted tax rate**.	$ 1.1527 /$100 Source
5.	**Prior year taxable value lost because court appeals of ARB decisions reduced prior year appraised value.**	
	A. Original prior year ARB values: ..... $ 126,070,097	Source
	B. Prior year values resulting from final court decisions: ..... – $ 122,537,341	Source
	C. Prior year value loss. Subtract B from A. [4]	$ 3,532,756

[1] Tex. Tax Code §§5.07(g)(4) and 26.04(d-1)
[2] Tex. Tax Code §26.012(14)
[3] Tex. Tax Code §26.012(14)
[4] Tex. Tax Code §26.012(13)

Line	No-New-Revenue Tax Rate Worksheet	Amount/Rate
6.	**Prior year taxable value subject to an appeal under Chapter 42, as of July 25.** **A. Prior year ARB certified value:** ..... $ 0 Source **B. Prior year disputed value:** ..... – $ 0 Source **C. Prior year undisputed value.** Subtract B from A. [5]	$ 0
7.	**Prior year Chapter 42-related adjusted values.** Add Line 5 and 6.	$ 3,532,756
8.	**Prior year taxable value, adjusted for actual and potential court-ordered adjustments.** Add Line 3 and Line 7.	$ 5,608,391,715
9.	**Prior year taxable value of property in territory the school deannexed after Jan. 1, of the prior year.** Enter the prior year value of property in deannexed territory. [6]	$ 0 Source
10.	**Prior year taxable value lost because property first qualified for an exemption in the current year.** If the school district increased an original exemption, use the difference between the original exempted amount and the increased exempted amount. Do not include value lost due to freeport goods-in-transit, or temporary disaster exemptions. Note that lowering the amount or percentage of an existing exemption in the current year does not create a new exemption or reduce taxable value. **A. Absolute exemptions.** Use prior year market value: ..... $ 1,942,000 Source **B. Partial exemptions.** Current year exemption amount or current year percentage exemption times prior year value: .. + $ 140,300,875 Source **C. Value loss.** Add A and B. [7]	$ 142,242,875
11.	**Prior year taxable value lost because property first qualified for agricultural appraisal (1-d or 1-d-1), timber appraisal, recreational/ scenic appraisal or public access airport special appraisal in the current year.** Use only properties that qualified in the current year for the first time; do not use properties that qualified in the prior year. **A. Prior year market value.** ..... $ 0 Source **B. Current year productivity or special appraised value:** ..... - $ 0 Source **C. Value loss.** Subtract B from A. [8]	$ 0
12.	**Total adjustments for lost value.** Add Lines 9, 10C and 11C.	$ 142,242,875
13.	**Adjusted prior year taxable value.** Subtract Line 12 from Line 8.	$ 5,466,148,840
14.	**Adjusted prior year total levy.** Multiply Line 4 by Line 13 and divide by $100.	$ 63,008,298
15.	**Taxes refunded for years preceding prior year.** Enter the amount of taxes refunded by the district for tax years preceding the prior year. Types of refunds include court decisions, Tax Code Section 25.25(b) and (c) corrections and Tax Code Section 31.11 payment errors. Do not include refunds for the prior tax year. This line applies only to tax years preceding the prior tax year. [9]	$ 994,364 Source
16.	**Adjusted prior year levy with refunds.** Add Line 14 and Line 15. [10] Note: If the governing body of the school district governs a junior college district in a county with a population of more than two million, subtract the amount of taxes the governing body dedicated to the junior college district in the prior year from the result.	$ 64,002,662

[5] Tex. Tax Code §26.012(13)
[6] Tex. Tax Code §26.012(15)
[7] Tex. Tax Code §26.012(15)
[8] Tex. Tax Code §26.012(15)
[9] Tex. Tax Code §26.012(13)
[10] Tex. Tax Code §26.012(13)

Line	No-New-Revenue Tax Rate Worksheet	Amount/Rate
17.	**Total current year taxable value on the current year certified appraisal roll today.** This value includes only certified values and includes the total taxable value of homesteads with tax ceilings (will deduct in line 19). These homesteads include homeowners age 65 or older or disabled. [11] **A. Certified values.**[12] ..... $ 6,441,481,372 Source **B. Pollution control and energy storage system exemption:** Deduct the value of property exempted for the current tax year for the first time as pollution control or energy storage system property: ..... - $ 0 Source **C. Total current year value.** Subtract B from A.	$ 6,441,481,372
18.	**Total value of properties under protest or not included on certified appraisal roll.** [13] **A. Current year taxable value of properties under protest.** The chief appraiser certifies a list of properties still under ARB protest. The list shows the appraisal district's value and the taxpayer's claimed value, if any, or an estimate of the value if the taxpayer wins. For each of the properties under protest, use the lowest of these values. Enter the total value under protest. [14] ..... $ 234,376,782 Source **B. Current year value of properties not under protest or included on certified appraisal roll.** The chief appraiser givesschool districts a list of those taxable properties that the chief appraiser knows about but are not included in theappraisal roll certification. These properties are also not on the list of properties that are still under protest. On thislist of properties, the chief appraiser includes the market value, appraised value and exemptions for the preceding year and a reasonable estimate of the market value, appraised value and exemptions for the current year. Use the lower market, appraised or taxable value (as appropriate). Enter the total value not on the roll. [15] ..... + $ 0 Source **C. Total value under protest or not certified.** Add A and B.	$ 234,376,782
19.	**Current year tax ceilings.** Enter current year total taxable value of homesteads with tax ceilings. These include the homesteads of homeowners age 65 or older or disabled.[16]	$ 366,478,764 Source
20.	**Anticipated contested value.** Affected taxing units enter the contested taxable value for all property that is subject to anticipated substantial litigation.[17] An affected taxing unit is wholly or partly located in a county that has a population of less than 500,000 and is located on the Gulf of Mexico.[18] If completing this section, the taxing unit must include supporting documentation in Section 6.[19] Taxing units that are not affected, enter 0.	$ 0 Source
21.	**Current year total taxable value.** Add Lines 17C and 18C. Subtract Lines 19 and 20.[20]	$ 6,309,379,390
22.	**Total current year taxable value of properties in territory annexed after Jan. 1, of the prior year.** Include both real and personal property. Enter the current year value of property in territory annexed by the school district.	$ 0 Source
23.	**Total current year taxable value of new improvements and new personal property located in new improvements.** New means the item was not on the appraisal roll in the prior year. An improvement is a building, structure, fixture or fence erected on or affixed to land. New additions to existing improvements may be included if the appraised value can be determined. New personal property in a new improvement must have been brought into the school district after Jan. 1, of the prior year, and be located in a new improvement.	$ 657,494,345 Source
24.	**Total adjustments to the current year taxable value.** Add lines 22 and 23.	$ 657,494,345
25.	**Adjusted current year taxable value.** Subtract line 24 from line 21.	$ 5,651,885,045
26.	**Current year NNR tax rate.** Divide line 16 by line 25 and multiply by $100.	$ 1.1324 /$100

[11] Tex. Tax Code §§26.012 and 26.04(c-2)
[12] Tex. Tax Code §26.012(6)
[13] Tex. Tax Code §26.01(c) and (d)
[14] Tex. Tax Code §26.01(c)
[15] Tex. Tax Code §26.01(d)
[16] Tex. Tax Code §26.012(6)(B)
[17] Tex Tax Code §§26.012(6)(C) and 26.012(1-b)
[18] Tex Tax Code §26.012(1-a)
[19] Tex Tax Code §26.04(d-3)
[20] Tex Tax Code §26.012(6)

Voter Approval Tax Rate

The voter-approval tax rate is the highest tax rate that a taxing unit may adopt without holding an election to seek voter approval of the rate. Most school districts calculate a voter-approval tax rate that is split into three separate rates.[21]

SECTION 2: Maximum Compressed, Enrichment and Debt Tax Rate Worksheet

This section calculates three components of the voter-approval tax rate:

1. **Maximum Compressed Tax Rate (MCR):** A district's maximum compressed tax rate is defined as the tax rate for the current tax year per $100 of valuation of taxable property at which the district must levy a maintenance and operations tax to receive the full amount of the tier one allotment. [22]
2. **Enrichment Tax Rate:** [23] A district's enrichment tax rate is defined as any tax effort in excess of the district's MCR and less than $0.17. The enrichment tax rate is divided into golden pennies and copper pennies. School districts can claim up to 8 golden pennies, not subject to compression, and 9 copper pennies which are subject to compression. [24]
3. **Debt Rate:** The debt rate includes the minimum dollar amount required to be paid toward the school district's debt service for the current year. [25] This rate accounts for principal and interest on bonds and other debt secured by property tax revenue.

The MCR and Enrichment Tax Rate added together make up the school district's maintenance and operations (M&O) tax rate. Districts cannot increase the district's M&O tax rate to create a surplus in M&O tax revenue for the purpose of paying the district's debt service. [26]

If a school district adopted a tax rate that exceeded its voter-approval tax rate without holding an election to respond to a disaster in the prior year, as allowed by Tax Code Section 26.042(e), the school district may not consider the amount by which it exceeded its voter-approval tax rate (disaster pennies) in the calculation this year. This adjustment will be made in Section 4 of this worksheet.

A district must complete an efficiency audit before seeking voter approval to adopt a M&O tax rate higher than the calculated M&O tax rate, hold an open meeting to discuss the results of the audit, and post the results of the audit on the district's website 30 days prior to the election. [27] Additionally, a school district located in an area declared a disaster by the governor may adopt a M&O tax rate higher than the calculated M&O tax rate during the two-year period following the date of the *declaration without conducting an efficiency audit.* [28] Districts should review information from TEA when calculating their voter-approval tax rate.

Line	MCR, Enrichment and Debt Tax Rate Worksheet	Amount/Rate
27.	**Current year maximum compressed tax rate (MCR).** TEA will publish compression rates based on district and statewide property value growth. Enter the school districts' maximum compressed rate based on guidance from TEA. [29]	$ 0.5766 /$100 Source
28.	**Current year enrichment tax rate.** Enter the greater of A and B. [30] A. Enter the district's prior year enrichment tax rate ..... $ 0.0500 /$100 B. $0.05 per $100 of taxable value ..... $ 0.0500 /$100	$ 0.0500 /$100 Source
29.	**Current year maintenance and operations (M&O) tax rate.** Add Lines 27 and 28. Note: M&O tax rate may not exceed the sum of $0.17 and the district's maximum compressed rate.[31]	$ 0.6266 /$100
30.	**Total current year debt to be paid with property tax revenue.** Debt means the interest and principal that will be paid on debts that: (1) Are paid by property taxes; (2) Are secured by property taxes; (3) Are scheduled for payment over a period longer than one year; and (4) Are not classified in the school district's budget as M&O expenses. A. **Debt** includes contractual payments to other school districts that have incurred debt on behalf of this school district, if those debts meet the four conditions above. Include only amounts that will be paid from property tax revenue. Do not include appraisal district budget payments. If the governing body of a taxing unit authorized or agreed to authorize a bond, warrant, certificate of obligation, or other evidence of indebtedness on or after Sept. 1, 2021, verify if it meets the amended definition of debt before including it here. [32] Enter debt amount: ..... $ 38,589,289 B. Subtract **unencumbered fund amount** used to reduce total debt. ..... – $ 0 C. Subtract **state aid** received for paying principal and interest on debt for facilities through the existing debt allotment program and/or instructional facilities allotment program. ..... – $ 7,042,392 D. **Adjust debt:** Subtract B and C from A.	Source Source Source $ 31,546,897

[21] Tex. Tax Code §26.08(n)
[22] Tex. Edu. Code §48.2551(a)(3)
[23] Tex. Tax Code §26.08(i) and Tex. Edu. Code §45.0032
[24] Tex. Edu. Code §§48.202(a-1)(2)
[25] Tex. Tax Code §26.012(3)
[26] Tex. Edu. Code §45.0021(a)
[27] Tex. Edu. Code §11.184(b)
[28] Tex. Edu. Code §11.184(b-1)
[29] Tex. Edu. Code §§48.255, 48.2551(b)(1) and (b)(2)
[30] Tex. Tax Code §26.08(n)(2)
[31] Tex. Edu. Code §45.003(d)
[32] Tex. Tax Code §26.012(7)

Line	MCR, Enrichment and Debt Tax Rate Worksheet	Amount/Rate
31.	**Certified prior year excess debt collections.** Enter the amount certified by the collector. [33]	$ 0 Source
32.	**Adjusted current year debt.** Subtract line 31 from line 30D.	$ 31,546,897
33.	**Current year anticipated collection rate.** If the anticipated rate in A is lower than actual rates in B, C and D, enter the lowest rate from B, C and D. If the anticipated rate in A is higher than at least one of the rates in the prior three years, enter the rate from A. Note that the rate can be greater than 100%. [34] A. Enter the current year anticipated collection rate certified by the collector. [35] 100.0000 % Source B. Enter the prior year actual collection rate 98.0100% Source C. Enter the 2024 actual collection rate 98.3800 % Source D. Enter the 2023 actual collection rate 98.3300 % Source	100.0000 %
34.	**Current year debt adjusted for collections.** Divide Line 32 by Line 33. Note: If the governing body of the school district governs a junior college district in a county with a population of more than two million, add the amount of taxes the governing body proposes to dedicate to the junior college district in the current year to the result.	$ 31,546,897
35.	**Current year total taxable value.** Enter the amount on Line 21 of the *No-New-Revenue Tax Rate Worksheet.*	$ 6,309,379,390
36.	**Current year debt rate.** Divide Line 34 by Line 35 and multiply by $100.	$ 0.5000 /$100
37.	**Current year voter-approval tax rate.** Add Lines 29 and 36. If the school district received distributions from an equalization tax imposed under former Chapter 18, Education Code, add the NNR tax rate as of the date of the county unit system's abolition to the sum of Lines 29 and 36. [36]	$ 1.1266 /$100

SECTION 3: Adjustment for Pollution Control

A school district may raise its rate for M&O funds used to pay for a facility, device or method for the control of air, water or land pollution. This includes any land, structure, building, installation, excavation, machinery, equipment or device that is used, constructed, acquired or installed wholly or partly to meet or exceed pollution control requirements. The school district's expenses are those necessary to meet the requirements of a permit issued by the Texas Commission on Environmental Quality (TCEQ). The school district must provide the tax assessor with a copy of the TCEQ letter of determination that states the portion of the cost of the installation for pollution control.

This section should only be completed by a school district that uses M&O funds to pay for a facility, device or method for the control of air, water or land pollution.

Line	Adjustment for Pollution Control Requirements Worksheet	Amount/Rate
38.	**Certified expenses from the Texas Commission on Environmental Quality (TCEQ).** Enter the amount certified in the determination letter from TCEQ. [37] The school district shall provide its tax assessor with a copy of the letter. [38]	$ 0
39.	**Current year total taxable value.** Enter the amount on Line 21 of the *No-New-Revenue Tax Rate Worksheet.*	$ 6,309,379,390
40.	**Additional rate for pollution control.** Divide line 38 by line 39 and multiply by $100.	$ 0 /$100
41.	**Current year voter-approval tax rate, adjusted for pollution control.** Add line 37 and line 40.	$ 1.1266 /$100

SECTION 4: Prior Year Disaster Tax Rate Adjustment

If a school district adopted a tax rate that exceeded its voter-approval tax rate without holding an election to respond to a disaster in the prior year, as allowed by Tax Code Section 26.042(e), the school district may not consider the amount by which it exceeded its voter-approval tax rate in the calculation this year. [39] As such, it must reduce its voter-approval tax rate for the current tax year.

This section applies to a school district in a disaster area that adopts a tax rate greater than its voter-approval tax rate without holding an election in the prior year, as provided for by Tax Code Section 26.042(e).

Line	Prior Year Disaster Adjustment Worksheet	Amount/Rate
42.	**Prior year adopted tax rate.** Enter the rate in Line 4 of the *No-New-Revenue Tax Rate Worksheet.*	$ /$100
43.	**Prior voter-approval tax rate.** If the school district adopted a tax rate above the prior year voter-approval tax rate without holding an election due to a disaster, enter the voter-approval tax rate from the prior year's worksheet.	$ /$100 Source

[33] Tex. Tax Code §§26.012(10) and 26.04(b)
[34] Tex. Tax Code §§26.04(h), (h-1) and (h-2)
[35] Tex. Tax Code §26.04(b)
[36] Tex. Tax Code §26.08(g)
[37] Tex. Tax Code §26.045(d)
[38] Tex. Tax Code §26.045(i)
[39] Tex. Tax Code §26.042(f) and Tex. Edu. Code §45.0032(d)

Line	Prior Year Disaster Adjustment Worksheet	Amount/Rate
44.	**Increase in the prior year tax rate due to disaster (disaster pennies).** Subtract Line 43 from Line 42.	$ _____/$100
45.	**Current year voter-approval tax rate, adjusted for prior year disaster.** Subtract Line 44 from one of the following lines (as applicable): Line 37 or Line 41 (school districts with pollution control).	$ _____/$100

SECTION 5: Total Tax Rate

Indicate the applicable total tax rates as calculated above.

No-New-Revenue Tax Rate . . . . . $ 1.1324 /$100

Enter the current year NNR tax rate from Line 26.

Voter-Approval Tax Rate . . . . . $ 1.1266 /$100

As applicable, enter the current year voter-approval tax rate from Line 37, Line 41 or Line 45. Indicate the line number used: 37

SECTION 6: Addendum

An affected taxing unit that enters an amount described by Tax Code Section 26.012(6)(C) in Line 20 must include the following as an addendum:

1. Documentation that supports the exclusion of value under Tax Code Section 26.012(6)(C); and
2. Each statement submitted to the designated officer or employee by the property owner or entity as required by Tax Code Section 41.48(c)(2) for that tax year.

Insert hyperlinks to supporting documentation:

SECTION 7: School District Representative Name and Signature

Enter the name of the person preparing the tax rate as authorized by the governing body of the school district. By signing below, you certify that you are the designated officer or employee of the school district and have calculated the tax rates in accordance with requirements in Tax Code and Education Code. [40]

print here

Printed Name of School District Representative

sign here

School District Representative

Date

[40] Tex. Tax Code §26.04(c)

Form 50-859 Tax Rate Calculation Worksheet — Source Documentation

MEDINA VALLEY ISD | 2026 | Minimum Debt Service Rate

LINE	DESCRIPTION	SOURCE DOCUMENT	PKT PAGE
1	Prior year total taxable value	CAD Docs / MEDINA / Latest Prior Year Supplement	9
		CAD Docs / BEXAR / Latest Prior Year Supplement	10
		CAD Docs / BEXAR / Certified Reports (7/25)	11
2	Prior year tax ceilings	CAD Docs / MEDINA / Latest Prior Year Supplement	9
		CAD Docs / BEXAR / Latest Prior Year Supplement	10
4IS	Prior year I&S tax rate	CAD Docs / Other	12
		TEA / District	13
4MO	Prior year M&O tax rate	CAD Docs / Other	12
		TEA / District	13
5A	Original prior year ARB values	CAD Docs / Preliminary Estimates (4/30)	14
		CAD Docs / BEXAR / Certified Reports (7/25)	15
5B	Prior year values from final court decisions	CAD Docs / Preliminary Estimates (4/30)	14
		CAD Docs / BEXAR / Certified Reports (7/25)	15
6A	Prior year ARB certified value	CAD Docs / Preliminary Estimates (4/30)	14
		CAD Docs / Preliminary Estimates (4/30)	16
6B	Prior year disputed value	CAD Docs / Preliminary Estimates (4/30)	14
		CAD Docs / Preliminary Estimates (4/30)	16
9	Prior year taxable value of deannexed territory	CAD Docs / MEDINA / Certified Reports (7/25)	17
		CAD Docs / BEXAR / Certified Reports (7/25)	18
10A	Absolute exemptions — prior year market value	CAD Docs / MEDINA / Certified Reports (7/25)	17
		CAD Docs / BEXAR / Certified Reports (7/25)	18
10B	Partial exemptions	CAD Docs / MEDINA / Certified Reports (7/25)	17
		CAD Docs / BEXAR / Certified Reports (7/25)	18
11A	Prior year market value (ag/timber/special appraisal)	CAD Docs / MEDINA / Certified Reports (7/25)	17
		CAD Docs / BEXAR / Certified Reports (7/25)	18
11B	Current year productivity or special appraised value	CAD Docs / MEDINA / Certified Reports (7/25)	17
		CAD Docs / BEXAR / Certified Reports (7/25)	18
15IS	Taxes refunded — I&S (years preceding prior year)	Tax Office Docs	19
15MO	Taxes refunded — M&O (years preceding prior year)	Tax Office Docs	19
17A	Certified values	CAD Docs / MEDINA / Certified Reports (7/25)	20
		CAD Docs / BEXAR / Certified Reports (7/25)	21
17B	Pollution control and energy storage system exemption	CAD Docs / MEDINA / Certified Reports (7/25)	17
		CAD Docs / BEXAR / Certified Reports (7/25)	18
18A	Current year taxable value of properties under protest	CAD Docs / MEDINA / Certified Reports (7/25)	22
		CAD Docs / BEXAR / Certified Reports (7/25)	23
18B	Current year value of properties not under protest or not certi…	CAD Docs / MEDINA / Certified Reports (7/25)	22
19	Current year tax ceilings	CAD Docs / MEDINA / Certified Reports (7/25)	24
		CAD Docs / BEXAR / Certified Reports (7/25)	25

20	Anticipated contested value	CAD Docs / Preliminary Estimates (4/30)	26
22	Total current year taxable value of properties in territory ann…	CAD Docs / MEDINA / Certified Reports (7/25)	17
		CAD Docs / BEXAR / Certified Reports (7/25)	18
23	Total current year taxable value of new improvements	CAD Docs / MEDINA / Certified Reports (7/25)	17
		CAD Docs / BEXAR / Certified Reports (7/25)	18
27	Current year maximum compressed tax rate (MCR)	TEA / District	27
28A	Prior year enrichment tax rate	CAD Docs / Other	12
		TEA / District	13
30A	Total current year debt — property tax revenue	TEA / District	28
30B	Subtract unencumbered fund amount	*No source annotation*	
30C	Subtract state aid received	CAD Docs / Other	12
		TEA / District	13
31	Certified prior year excess debt collections	*No source annotation*	
33A	Current year anticipated collection rate	Tax Office Docs	29
33B	Current year - 1 actual collection rate	Tax Office Docs	30
33C	Current year - 2 actual collection rate	Tax Office Docs	31
33D	Current year - 3 actual collection rate	Tax Office Docs	32
38	TCEQ certified expenses for pollution control	*No source annotation*	
43	Prior year voter-approval tax rate (disaster adjustment)	*No source annotation*	

MEDINA County

2025 CERTIFIED TOTALS

SMV - MEDINA VALLEY ISD

As of Supplement 17

Property Count: 18,895 | Grand Totals | 7/24/2026 4:44:30PM

Land	Value
Homesite:	548,280,636
Non Homesite:	490,104,326
Ag Market:	1,032,606,925
Timber Market:	0

Improvement	Value
Homesite:	2,135,723,940
Non Homesite:	680,279,385

Non Real	Count	Value
Personal Property:	763	638,920,707
Mineral Property:	93	4,756,220
Autos:	0	0

Ag	Non Exempt	Exempt
Total Productivity Market:	1,031,980,545	626,380
Ag Use:	21,411,234	7,780
Timber Use:	0	0
Productivity Loss:	1,010,569,311	618,600

Total Land	(+)	2,070,991,887
Total Improvements	(+)	2,816,003,325
Total Non Real	(+)	643,676,927
Market Value	=	5,530,672,139
Productivity Loss	(-)	1,010,569,311
Appraised Value	=	4,520,102,828
Homestead Cap	(-)	96,763,091
23.231 Cap	(-)	19,180,906
Assessed Value	=	4,404,158,831
Total Exemptions Amount (Breakdown on Next Page)	(-)	1,469,236,066
Net Taxable	[1]	2,934,922,765

Freeze	Assessed	Taxable	Actual Tax	Ceiling	Count
DP	23,451,295	6,633,919	55,122.40	83,229.49	124
OV65	671,144,608	253,700,275	1,854,258.95	2,242,103.49	2,393
Total	694,595,903	260,334,194	1,909,381.35	2,325,332.98	2,517
Tax Rate	1.1527000				

Freeze Taxable	(-) [2]	260,334,194

Transfer	Assessed	Taxable	Post % Taxable	Adjustment	Count
OV65	102,550	0	0	0	1
Total	102,550	0	0	0	1

Transfer Adjustment	(-)	0
Freeze Adjusted Taxable	=	2,674,588,571

APPROXIMATE LEVY = (FREEZE ADJUSTED TAXABLE * (TAX RATE / 100)) + ACTUAL TAX
32,739,363.81 = 2,674,588,571 * (1.1527000 / 100) + 1,909,381.35

Certified Estimate of Market Value:	5,530,672,139
Certified Estimate of Taxable Value:	2,934,922,765
Tax Increment Finance Value:	0
Tax Increment Finance Levy:	0.00

Bexar County

2025 CERTIFIED TOTALS

68 - MEDINA VALLEY ISD

ARB Approved Totals

As of Supplement 294

Property Count: 18,394

7/2/2026 9:57:12AM

Land	Value
Homesite:	864,183,597
Non Homesite:	425,284,603
Ag Market:	318,575,101
Timber Market:	0

Improvement	Value
Homesite:	3,099,596,449
Non Homesite:	313,165,544

Non Real	Count	Value
Personal Property:	236	56,258,224
Mineral Property:	0	0
Autos:	0	0

Ag	Non Exempt	Exempt
Total Productivity Market:	318,574,187	914
Ag Use:	1,761,096	914
Timber Use:	0	0
Productivity Loss:	316,813,091	0

Total Land	(+)	1,608,043,301
Total Improvements	(+)	3,412,761,993
Total Non Real	(+)	56,258,224
Market Value	=	5,077,063,518
Productivity Loss	(-)	316,813,091
Appraised Value	=	4,760,250,427
Homestead Cap	(-)	46,128,478
23.231 Cap	(-)	15,922,710
Assessed Value	=	4,698,199,239
Total Exemptions Amount (Breakdown on Next Page)	(-)	1,682,769,476
1 **Net Taxable**	=	3,015,429,763

Freeze	Assessed	Taxable	Actual Tax	Ceiling	Count
DP	22,051,083	5,704,536	31,756.90	37,179.11	84
OV65	248,938,741	79,630,839	462,890.94	516,786.13	845
Total	270,989,824	85,335,375	494,647.84	553,965.24	929
Tax Rate	1.1527000				

2 **Freeze Taxable**	(-)	85,335,375
Freeze Adjusted Taxable	=	2,930,094,388

APPROXIMATE LEVY = (FREEZE ADJUSTED TAXABLE * (TAX RATE / 100)) + ACTUAL TAX
34,269,845.85 = 2,930,094,388 * (1.1527000 / 100) + 494,647.84

Calculated Estimate of Market Value:	5,077,063,518
Calculated Estimate of Taxable Value:	3,015,429,763
Tax Increment Finance Value:	0
Tax Increment Finance Levy:	0.00

Bexar Appraisal District
25.25D Change Report by Entity

Ent Code	Entity Name	Change Type	Beginning Market Value	Beginning Taxable Value	Ending Market Value	Ending Taxable Value
50	ALAMO HEIGHTS ISD	Total Section 2525D Changes for 2025	$169,760	$169,760	$83,000	$83,000
51	EAST CENTRAL ISD	Total Section 2525D Changes for 2025	$391,420	$134,700	$233,320	$53,320
53	HARLANDALE ISD	Total Section 2525D Changes for 2025	$159,400	$159,400	$95,000	$95,000
55	NORTH EAST ISD	Total Section 2525D Changes for 2025	$6,502,540	$6,023,190	$4,877,000	$4,170,340
56	NORTHSIDE ISD	Total Section 2525D Changes for 2025	$1,301,670	$1,301,670	$861,700	$792,615
57	SAN ANTONIO ISD	Total Section 2525D Changes for 2025	$18,998,124	$18,998,124	$13,953,449	$13,953,449
58	SOUTH SAN ISD	Total Section 2525D Changes for 2025	$7,633,860	$7,633,860	$5,200,000	$5,200,000
59	SOUTHSIDE ISD	Total Section 2525D Changes for 2025	$254,670	$252,422	$127,000	$127,000
68	MEDINA VALLEY ISD	Total Section 2525D Changes for 2025	$395,850	$295,850	$316,000	$176,000
72	SOMERSET ISD	Total Section 2525D Changes for 2025	$115,860	$115,860	$14,750	$14,750
73	SOUTHWEST ISD	Total Section 2525D Changes for 2025	$469,790	$369,790	$229,000	$97,000

MEDINA VALLEY ISD

		SY 2024-25	SY 2025-26	SY 2026-27
Students				
1.	Refined Average Daily Attendance (ADA)	8,852.909	9,643.033	10,385.561
2.	Regular Program ADA (Ref ADA - Spec Ed FTEs - CT FTEs)	7,602.917	8,402.481	9,075.826
3.	Special Education FTEs Detail Report	301.412	342.092	342.092
4.	Career & Technology FTEs	948.580	898.460	967.643
5.	Weighted ADA (WADA) Detail Report	13,007.146	14,364.187	15,364.862
	WADA-to-ADA Ratio	*1.469*	*1.490*	*1.479*
6.	PEIMS Enrollment	9,638	10,439	11,307
Property Values				
7.	Prior Tax Year State Certified Property Value	$4,720,203,845	$5,509,471,758	$6,085,078,524
8.	Current Tax Year State Certified Property Value	$5,509,471,758	$6,085,078,524	$6,539,529,810
	Year-Over-Year Value Change	16.72%	10.45%	7.47%
Tax Rates and Collections				
9.	Current Tax Year M&O Tax Rate	$0.666900	$0.652700	$0.626600
10.	Tier One Tax Year M&O Tax Rate	$0.616900	$0.602700	$0.576600
11.	Maximum Compressed Tax Rate	$0.616900	$0.602700	$0.576600
	Tier Two, Level One Pennies (Golden Pennies)		*$0.050000*	*$0.050000*
	Tier Two, Level Two Pennies (Copper Pennies)		*$0.000000*	*$0.000000*
	VTCS 2784g Pennies (Unequalized Pennies)	*$0.000000*	*$0.000000*	*$0.000000*
12.	M&O Tax Collections Detail Report	$35,836,965	$37,600,000	$38,782,815
	M&O Collections Relative to T2	97.5%	94.7%	94.6%
13.	I&S Tax Rate	$0.500000	$0.500000	$0.500000
14.	I&S Tax Collections	$26,860,678	$28,725,000	$30,841,905
	I&S Collections Relative to T8	97.5%	94.4%	94.3%
15.	Total Tax Collections	$62,697,643	$66,325,000	$69,624,720
16.	Total Tax Levy	$65,501,127	$70,614,761	$74,127,899
Funding Components				
17.	District Basic Allotment * TR / MCR	$6,160	$6,215	$6,215
18.	School Safety Allotment (SSA) ADA	8,852.909	9,643.033	10,385.561
19.	ASF ADA	7,965.679	8,852.909	9,643.033
20.	Per Capita Rate	$619.868	$471.190	$620.000
Program Intent Codes - Allotments				
Tier One Subchapter B and C Allotments		SY 2024-25	SY 2025-26	SY 2026-27
21.	11-Regular Program Allotment 48.051	$46,833,969	$52,221,419	$56,406,259
22.	Small and Mid-Size Allotment 48.101	$0	$0	$0
23.	23-Special Education Adjusted Allotment 48.102 *(spend 55% of amount)*	$11,043,464	$12,358,928	$12,358,928
24.	37-Dyslexia Allotment 48.103 *(spend 100% of amount)*	$352,352	$404,597	$454,317
25.	24-Compensatory Education Allotment 48.104 *(spend 55% of amount, **spend req. repealed beginning with 25-26 school year**)*	$7,441,257	$8,362,878	$9,057,560
26.	25-Bilingual Education Allotment 48.105 *(spend 55% of amount)*	$369,671	$399,006	$429,730
27.	22-Career and Technology Allotment 48.106 *(spend 55% of amount)*	$7,649,741	$7,429,729	$8,001,829
28.	11-Public Education Grant 48.107	$0	$0	$0
29.	36-Early Education Allotment 48.108 *(spend 100% of amount)* ***INCLUDES REALLOCATION UNDER HB2***	$1,091,162	$1,659,780	$1,787,585
30.	21-Gifted & Talented Adjusted Allotment 48.109 *(spend 100% of amount)*	$186,881	$207,234	$207,234
31.	38-CCMR Outcomes Bonus 48.110 *(spend 55% of amount)*	$78,000	$156,000	$156,000
32.	Fast Growth Allotment 48.111	$4,801,936	$6,006,520	$6,565,847
33.	Teacher Incentive Allotment 48.112	$21,809	$36,074	$36,074
34.	Mentor Program Allotment 48.114	$0	$0	$0
	School Safety Allotment 48.115	$223,529	**MOVED TO 48.160**	**MOVED TO 48.160**
35.	Rural Pathways Excellence Partnership (R-PEP) Allotment and Outcomes Bonus 48.118	$0	$0	$0
	Early Literacy Intervention Allotment 48.122	*N/A*	*N/A*	$0
Tier One Subchapter D Allotments		SY 2024-25	SY 2025-26	SY 2026-27
36.	99-Transportation Allotment 48.151	$1,384,373	$1,384,373	$1,384,373
37.	99-New Instructional Facility Allotment 48.152	$892,187	$48,667	$0
38.	Dropout Recovery and Residential Placement Facility Allotment 48.153	$268	$936	$936
39.	Tuition Allotment for Districts not Offering all Grade Levels 48.154	$0	$0	$0
40.	College Preparation Assessment Reimbursement 48.155	$17,667	$17,667	$17,667
41.	Certification Examination Reimbursement 48.156	$22,853	$22,853	$22,853
	Preparing and Retaining Educators through Partnership (PREP) Allotment 48.157	*N/A*	*N/A*	$0
42.	Teacher Retention Allotment 48.158	*N/A*	$2,477,500	$2,477,500
43.	Support Staff Retention Allotment 48.1581	*N/A*	$378,112	$408,412
44.	Special Education Full Individual and Initial Evaluation (FIIE) Allotment 48.159	*N/A*	$323,000	$323,000
45.	School Safety Allotment 48.160	*N/A*	$505,328	$520,995
46.	Allotment for Basic Costs 48.161	*N/A*	$1,106,534	$1,198,496
47.	Total Cost of Tier One Detail Report	$82,411,119	$95,507,133	$101,815,595
48.	Local Fund Assignment	($33,987,931)	($36,674,768)	($37,706,929)
49.	Per Capita Distribution from Available School Fund (ASF)	($4,937,670)	($4,171,402)	($5,978,680)
Foundation School Program (FSP) State Funding				
50.	FSP State Share of Tier One *(Total Cost of Tier One - Local Fund Assignment - ASF)*	$43,485,518	$54,660,963	$58,129,986
51.	Tier Two Detail Report	$5,532,643	$5,921,684	$6,319,772
52.	Other Programs Detail Report	$1,233,010	$1,285,639	$1,374,069
53.	Total FSP Operations Funding	$50,251,172	$61,868,286	$65,823,827
State Aid by Fund Code / Object Code - Funding Source				
M&O State Aid		SY 2024-25	SY 2025-26	SY 2026-27
54.	199/5812 - Foundation School Fund	$49,865,652	$61,241,946	$65,145,433
55.	199/5811 - Available School Fund	$4,937,670	$4,171,402	$5,978,680
56.	410/5829 - Instructional Materials & Technology Fund	$385,520	$626,340	$678,394
I&S State Aid				
57.	599/5829 - EDA	$0	$0	$0
58.	599/5829 - Instructional Facilities Allotment (Bond)	$0	$0	$0
59.	199/5829 - Instructional Facilities Allotment (Lease Purchase)	$0	$0	$0
60.	Additional State Aid for Homestead Exemption (ASAHE) for Facilities	$3,541,529	$7,075,839	$7,042,392
61.	TOTAL FSP/ASF STATE AID	$58,730,371	$73,115,527	$79,337,328
Local Revenue in Excess of Entitlement				
62.	Local Revenue in Excess of Entitlement Detail Report	$0	$0	$0
Summary of Total State/Local M&O Revenue				
	Total M&O State Aid (excl. recapture netting)	$55,188,842	$66,039,688	$71,802,507
	Total M&O Tax Collections	$35,836,965	$37,600,000	$38,782,815
	Total Recapture	$0	$0	$0
	Net Total State/Local M&O Revenue	$91,025,807	$103,639,688	$110,585,322
	Total State/Local M&O Revenue per ADA	$10,282	$10,748	$10,648
	M&O State Share	*60.6%*	*63.7%*	*64.9%*
	M&O Local Share	*39.4%*	*36.3%*	*35.1%*

4MO, 4IS, 28A

30C

Back to Source Documentation Links

Outlook

RE: Medina CAD - Tax Rate Calculation Worksheet Data Request

From Johnette Dixon <jdixon@medinacad.org>
Date Fri 8/7/2026 4:21 PM
To MoakCasey Truth-In-Taxation Services <tnt@moakcasey.com>; Customer Service <cs@medinacad.org>

Good afternoon,

They did not have any 5A, 5B, 6A, 6B

Thanks,
Johnette

From: MoakCasey Truth-In-Taxation Services <tnt@moakcasey.com>
Sent: Friday, August 7, 2026 4:20 PM
To: Customer Service <cs@medinacad.org>; Johnette Dixon <jdixon@medinacad.org>
Subject: Medina CAD - Tax Rate Calculation Worksheet Data Request

Hello,

We are working with Medina Valley ISD, Hondo ISD, Natalia ISD, and Utopia ISD this year for the tax rate calculation process. Can you please provide active/inactive litigation reports and/or additional support confirming any value lost to litigation / open court appeals (outlined below)? Feel free to attach that documentation or respond to this this email, and we can use it as official documentation to meet the requirements of SB 1023.

5.	**Prior year taxable value lost because court appeals of ARB decisions reduced prior year appraised value.** **A. Original prior year ARB values:** ..... $ _____ **B. Prior year values resulting from final court decisions:** ..... – $ _____ **C. Prior year value loss.** Subtract B from A. [4]	$ _____

6.	**Prior year taxable value subject to an appeal under Chapter 42, as of July 25.** **A. Prior year ARB certified value:** ..... $ _____ **B. Prior year disputed value:** ..... – $ _____ **C. Prior year undisputed value.** Subtract B from A. [5]	$ _____

Thank you,
Oscar Ayala
Director of School Finance
oayala@moakcasey.com
mobile 254.733.4664
office 512.485.7878
www.MoakCasey.com

MOAKCASEY
PROVEN LEADERS ADVANCING TEXAS SCHOOLS

BEXAR CENTRAL APPRAISAL DISTRICT

Closed Litigated Accounts
Truth In Taxation
Value Lost Through Litigation

Closed Litigated Accounts Processed 7/20/2025 - 07/20/2026
For Tax Unit: 68 - Medina Valley ISD

TOTALS: Closed Litigated Accounts Processed 7/20/2025 - 07/20/2026

	# ACCTS	TOTAL BEFORE MARKET	TOTAL AFTER MARKET	TOTAL BEFORE ASSESSED	TOTAL AFTER ASSESSED	TOTAL MARKET LOSS	TOTAL ASSESSED LOSS
68 - Medina Valley ISD	12	$136,522,160	$131,773,760	$128,630,097	$124,997,341	-$4,748,400	-$3,632,756

TOTALS BY YEAR: 2020

	# ACCTS	TOTAL BEFORE MARKET	TOTAL AFTER MARKET	TOTAL BEFORE ASSESSED	TOTAL AFTER ASSESSED	TOTAL MARKET LOSS	TOTAL ASSESSED LOSS
68 - Medina Valley ISD	0	$0	$0	$0	$0	$0	$0

TOTALS BY YEAR: 2021

	# ACCTS	TOTAL BEFORE MARKET	TOTAL AFTER MARKET	TOTAL BEFORE ASSESSED	TOTAL AFTER ASSESSED	TOTAL MARKET LOSS	TOTAL ASSESSED LOSS
68 - Medina Valley ISD	0	$0	$0	$0	$0	$0	$0

TOTALS BY YEAR: 2022

	# ACCTS	TOTAL BEFORE MARKET	TOTAL AFTER MARKET	TOTAL BEFORE ASSESSED	TOTAL AFTER ASSESSED	TOTAL MARKET LOSS	TOTAL ASSESSED LOSS
68 - Medina Valley ISD	1	$2,560,000	$2,460,000	$2,560,000	$2,460,000	-$100,000	-$100,000

TOTALS BY YEAR: 2023

	# ACCTS	TOTAL BEFORE MARKET	TOTAL AFTER MARKET	TOTAL BEFORE ASSESSED	TOTAL AFTER ASSESSED	TOTAL MARKET LOSS	TOTAL ASSESSED LOSS
68 - Medina Valley ISD	0	$0	$0	$0	$0	$0	$0

TOTALS BY YEAR: 2024

	# ACCTS	TOTAL BEFORE MARKET	TOTAL AFTER MARKET	TOTAL BEFORE ASSESSED	TOTAL AFTER ASSESSED	TOTAL MARKET LOSS	TOTAL ASSESSED LOSS
68 - Medina Valley ISD	0	$0	$0	$0	$0	$0	$0

TOTALS BY YEAR: 2025

	# ACCTS	TOTAL BEFORE MARKET	TOTAL AFTER MARKET	TOTAL BEFORE ASSESSED	TOTAL AFTER ASSESSED	TOTAL MARKET LOSS	TOTAL ASSESSED LOSS
68 - Medina Valley ISD	11	$133,962,160	$129,313,760	$126,070,097	$122,537,341	-$4,648,400	-$3,532,756

5A 5B

Back to Source Documentation Links

Zero Value Confirmation

Tax Year 2026 · Generated August 06, 2026

District: MEDINA VALLEY ISD
Submitted by: Scott Griscom, Assistant Chief Appraiser
Office: Bexar County Appraisal District

SB 1023 (2025) requires that truth-in-taxation calculations include hyperlinks to source documents. The individual above has confirmed that the fields listed below carry a value of zero and that no supporting source documents exist or are applicable for the current tax year.

Field	Form	Confirmed on
Form 50-859, Line 6A: Value under Chapter 42 appeal (ARB certified)	50-859	August 06, 2026
Form 50-859, Line 6B: Value under Chapter 42 appeal (disputed)	50-859	August 06, 2026

Back to Source Documentation Links

MEDINA County

2026 CERTIFIED TOTALS

SMV - MEDINA VALLEY ISD

As of Certification

Property Count: 20,378 **Effective Rate Assumption** 7/24/2026 4:45:46PM

New Value

TOTAL NEW VALUE MARKET:	**$333,640,014**
TOTAL NEW VALUE TAXABLE:	**$259,575,827**

23

New Exemptions

Exemption	Description	Count		
EX-XG	11.184 Primarily performing charitable functio	1	2025 Market Value	$0
EX-XV	Other Exemptions (including public property, r	4	2025 Market Value	$297,220
EX366	HB366 Exempt	7	2025 Market Value	$9,630
	ABSOLUTE EXEMPTIONS VALUE LOSS			**$306,850**

10A

Exemption	Description	Count	Exemption Amount
145B	11.145 (b) Single Situs, Single Owner	453	$13,126,700
145D	11.145 (d) Multiple Situs, Leases	179	$3,654,390
145D1	11.145 (d-1) Multiple Situs, Consignment	10	$293,500
145F	11.145 (f) Single Situs, Related Business Entity	18	$875,500
DP	Disability	3	$25,400
DV1	Disabled Veterans 10% - 29%	5	$29,504
DV2	Disabled Veterans 30% - 49%	5	$37,500
DV3	Disabled Veterans 50% - 69%	12	$116,923
DV4	Disabled Veterans 70% - 100%	65	$721,287
DV4S	Disabled Veterans Surviving Spouse 70% - 100	1	$12,000
DVHS	Disabled Veteran Homestead	122	$29,838,093
HS	Homestead	345	$38,903,950
OV65	Over 65	157	$6,246,458
	PARTIAL EXEMPTIONS VALUE LOSS	**1,375**	**$93,881,205**
	NEW EXEMPTIONS VALUE LOSS		**$94,188,055**

17B

10B

Increased Exemptions

Exemption	Description	Count	Increased Exemption Amount

INCREASED EXEMPTIONS VALUE LOSS

TOTAL EXEMPTIONS VALUE LOSS **$94,188,055**

11A, 11B **New Ag / Timber Exemptions**

New Annexations

9, 22 **New Deannexations**

Average Homestead Value

Category A and E

Count of HS Residences	Average Market	Average HS Exemption	Average Taxable
7,432	$358,916	$131,993	$226,923

Category A Only

Count of HS Residences	Average Market	Average HS Exemption	Average Taxable
6,774	$359,672	$131,957	$227,715

Bexar County

2026 CERTIFIED TOTALS

68 - MEDINA VALLEY ISD

As of Certification

Property Count: 20,586 **Effective Rate Assumption** 7/18/2026 10:15:05AM

New Value

	~~TOTAL NEW VALUE MARKET:~~	~~$517,821,430~~
23	**TOTAL NEW VALUE TAXABLE:**	**$397,918,518**

New Exemptions

Exemption	Description	Count		
EX-XV	Other Exemptions (including public property, r	3	2025 Market Value	$1,635,150
10A	**ABSOLUTE EXEMPTIONS VALUE LOSS**			**$1,635,150**

Exemption		Description	Count	Exemption Amount
145B		11.145 (b) Single Situs, Single Owner	205	$10,914,790
145D		11.145 (d) Multiple Situs, Leases	8	$625,000
145D1		11.145 (d-1) Multiple Situs, Consignment	25	$401,330
145F		11.145 (f) Single Situs, Related Business Entity	6	$375,000
DP	17B	DISABILITY	6	$340,140
DV1		Disabled Veterans 10% - 29%	4	$20,000
DV2		Disabled Veterans 30% - 49%	6	$45,000
DV3		Disabled Veterans 50% - 69%	3	$30,000
DV3S		Disabled Veterans Surviving Spouse 50% - 69%	1	$10,000
DV4		Disabled Veterans 70% - 100%	61	$588,000
DVHS		Disabled Veteran Homestead	60	$10,960,487
HS		HOMESTEAD	170	$15,870,772
MASSS		Member Armed Services Surviving Spouse	1	$169,650
OV65		OVER 65	~~114~~	~~$6,069,501~~
10B		**PARTIAL EXEMPTIONS VALUE LOSS**	**670**	**$46,419,670**
			NEW EXEMPTIONS VALUE LOSS	**$48,054,820**

Increased Exemptions

Exemption	Description	Count	Increased Exemption Amount
	INCREASED EXEMPTIONS VALUE LOSS		

TOTAL EXEMPTIONS VALUE LOSS **$48,054,820**

New Ag / Timber Exemptions

9, 11A, 11B, 22 — **New Annexations**

New Deannexations

Average Homestead Value

Category A and E

Count of HS Residences	Average Market	Average HS Exemption	Average Taxable
9,306	$297,893	$141,013	$156,880

Category A Only

Count of HS Residences	Average Market	Average HS Exemption	Average Taxable
9,253	$297,071	$140,791	$156,280

SMVBEXAR	2024 R179174	2736070	46029 IS	-50.61
SMVBEXAR	2024 R179174	2736070	46029 MO	-67.5
SMVBEXAR	2024 R179280	2711322	46001 IS	-4.51
SMVBEXAR	2024 R179280	2711322	46001 MO	-6.02
SMVBEXAR	2024 R179363	2732260	46022 IS	-62.06
SMVBEXAR	2024 R179363	2732260	46022 MO	-82.76
SMVBEXAR	2024 R179378	2776474	46211 IS	-38.93
SMVBEXAR	2024 R179378	2776474	46211 MO	-51.93
SMVBEXAR	2024 R67869	2712608	46007 IS	-555.23
SMVBEXAR	2024 R67869	2712608	46007 MO	-740.57
SMVBEXAR	2024 R67851	2711065	46001 IS	-500
SMVBEXAR	2024 R67851	2711065	46001 MO	-666.9
SMVBEXAR	2024 R65159	2740712	46037 IS	-251.84
SMVBEXAR	2024 R65159	2740712	46037 MO	-335.91
SMVBEXAR	2024 R65213	2769971	46156 IS	-58.5
SMVBEXAR	2024 R65213	2769971	46156 MO	-78.03
SMVBEXAR	2024 R67827	2773809	46184 IS	-500
SMVBEXAR	2024 R67827	2773809	46184 MO	-666.9
SMVBEXAR	2024 R67832	2776405	46211 IS	-375.68
SMVBEXAR	2024 R67832	2776405	46211 MO	-501.09
SMVBEXAR	2024 R59760	2735923	46029 IS	-240.38
SMVBEXAR	2024 R59760	2735923	46029 MO	-320.63
SMVBEXAR	2024 R60394	2764811	46108 IS	-182.48
SMVBEXAR	2024 R60394	2764811	46108 MO	-243.42
SMVBEXAR	2024 R60412	2764810	46108 IS	-498.84
SMVBEXAR	2024 R60412	2764810	46108 MO	-665.36
SMVBEXAR	2024 R26959	2712596	46007 IS	-512.32
SMVBEXAR	2024 R26959	2712596	46007 MO	-683.33
SMVBEXAR	2024 R26974	2773808	46184 IS	-646.51
SMVBEXAR	2024 R26974	2773808	46184 MO	-862.32
SMVBEXAR	2024 R27010	2776403	46211 IS	-127.05
SMVBEXAR	2024 R27010	2776403	46211 MO	-169.46
SMVBEXAR	2024 R37512	2773810	46184 IS	-555
SMVBEXAR	2024 R37512	2773810	46184 MO	-740.25
SMVBEXAR	2024 R75534	2711159	46001 IS	-715.45
SMVBEXAR	2024 R75534	2711159	46001 MO	-954.27
SMVBEXAR	2024 R75543	2776407	46211 IS	-1358.84
SMVBEXAR	2024 R75543	2776407	46211 MO	-1812.43
SMVBEXAR	2024 R75579	2769978	46156 IS	-500
SMVBEXAR	2024 R75579	2769978	46156 MO	-666.9
SMVBEXAR	2024 R75617	2764822	46108 IS	-500
SMVBEXAR	2024 R75617	2764822	46108 MO	-666.9
SMVBEXAR	2024 R75635	2735929	46029 IS	-370.22
SMVBEXAR	2024 R75635	2735929	46029 MO	-493.8

SMVBEXAR	2024 R73592	2711067	46001 IS	-500
SMVBEXAR	2024 R73592	2711067	46001 MO	-666.9
SMVBEXAR	2024 R75397	2715990	46021 IS	-10
SMVBEXAR	2024 R75397	2715990	46021 MO	-13.34
SMVBEXAR	2024 R75397	2769977	46156 IS	-1021.08
SMVBEXAR	2024 R75397	2769977	46156 MO	-1361.92
SMVBEXAR	2024 R75488	2760199	46080 IS	-403
SMVBEXAR	2024 R75488	2760199	46080 MO	-537.53
SMVBEXAR	2024 R75489	2740717	46037 IS	-1388.46
SMVBEXAR	2024 R75489	2740717	46037 MO	-1851.94
SMVBEXAR	2024 R69450	2711128	46001 IS	-550
SMVBEXAR	2024 R69450	2711128	46001 MO	-733.59
SMVBEXAR	2024 R69451	2711203	46001 IS	-60
SMVBEXAR	2024 R69451	2711203	46001 MO	-80.03
SMVBEXAR	2024 R69477	2764823	46108 IS	-312.79
SMVBEXAR	2024 R69477	2764823	46108 MO	-417.21
SMVBEXAR	2024 R73397	2773815	46184 IS	-487.7
SMVBEXAR	2024 R73397	2773815	46184 MO	-650.5
SMVBEXAR	2024 R69407	2715989	46021 IS	-555
SMVBEXAR	2024 R69407	2715989	46021 MO	-740.26
SMVBEXAR	2024 R96984	2715996	46021 IS	-500
SMVBEXAR	2024 R96984	2715996	46021 MO	-666.9
SMVBEXAR	2024 R96986	2764850	46108 IS	-500
SMVBEXAR	2024 R96986	2764850	46108 MO	-666.9
SMVBEXAR	2024 R97128	2711098	46001 IS	-60
SMVBEXAR	2024 R97128	2711098	46001 MO	-80.02
SMVBEXAR	2024 R97179	2776411	46211 IS	-500
SMVBEXAR	2024 R97179	2776411	46211 MO	-666.9
SMVBEXAR	2024 R97598	2769989	46156 IS	-500
SMVBEXAR	2024 R97598	2769989	46156 MO	-666.9
SMVBEXAR	2024 R88601	2712617	46007 IS	-500
SMVBEXAR	2024 R88601	2712617	46007 MO	-666.9
SMVBEXAR	2024 R88617	2711068	46001 IS	-395.37
SMVBEXAR	2024 R88617	2711068	46001 MO	-527.35
SMVBEXAR	2024 R87434	2711095	46001 IS	-500
SMVBEXAR	2024 R87434	2711095	46001 MO	-666.9
SMVBEXAR	2024 R88224	2711130	46001 IS	-90.06
SMVBEXAR	2024 R88224	2711130	46001 MO	-120.12
SMVBEXAR	2024 R88411	2732132	46022 IS	-500
SMVBEXAR	2024 R88411	2732132	46022 MO	-666.9
SMVBEXAR	2024 R88414	2740728	46037 IS	-500
SMVBEXAR	2024 R88414	2740728	46037 MO	-666.9
SMVBEXAR	2024 R88488	2764845	46108 IS	-500
SMVBEXAR	2024 R88488	2764845	46108 MO	-666.9

SMVBEXAR	2024 R88553	2769986	46156 IS	-500
SMVBEXAR	2024 R88553	2769986	46156 MO	-666.9
SMVBEXAR	2024 R96930	2735944	46029 IS	-500
SMVBEXAR	2024 R96930	2735944	46029 MO	-666.9
SMVBEXAR	2024 R96934	2760217	46080 IS	-873.04
SMVBEXAR	2024 R96934	2760217	46080 MO	-1164.47
SMVBEXAR	2024 R96977	2776412	46211 IS	-550
SMVBEXAR	2024 R96977	2776412	46211 MO	-733.59
SMVBEXAR	2024 R82566	2764830	46108 IS	-500
SMVBEXAR	2024 R82566	2764830	46108 MO	-666.9
SMVBEXAR	2024 R82604	2760207	46080 IS	-37.5
SMVBEXAR	2024 R82604	2760207	46080 MO	-50.02
SMVBEXAR	2024 R82478	2712610	46007 IS	-550
SMVBEXAR	2024 R82478	2712610	46007 MO	-733.59
SMVBEXAR	2024 R82549	2764829	46108 IS	-500
SMVBEXAR	2024 R82549	2764829	46108 MO	-666.9
SMVBEXAR	2024 R82636	2715992	46021 IS	-60
SMVBEXAR	2024 R82636	2715992	46021 MO	-80.03
SMVBEXAR	2024 R82644	2712618	46007 IS	-274.74
SMVBEXAR	2024 R82644	2712618	46007 MO	-366.45
SMVBEXAR	2024 R75641	2740718	46037 IS	-500
SMVBEXAR	2024 R75641	2740718	46037 MO	-666.9
SMVBEXAR	2024 R77391	2712609	46007 IS	-381.96
SMVBEXAR	2024 R77391	2712609	46007 MO	-509.46
SMVBEXAR	2024 R77474	2711069	46001 IS	-248.63
SMVBEXAR	2024 R77474	2711069	46001 MO	-331.63
SMVBEXAR	2024 R80832	2735937	46029 IS	-500
SMVBEXAR	2024 R80832	2735937	46029 MO	-666.9
SMVBEXAR	2024 R80893	2769988	46156 IS	-306.83
SMVBEXAR	2024 R80893	2769988	46156 MO	-409.25
SMVBEXAR	2024 R67879	2712607	46007 IS	-82.5
SMVBEXAR	2024 R67879	2712607	46007 MO	-110.04
SMVBEXAR	2024 R86377	2735936	46029 IS	-500
SMVBEXAR	2024 R86377	2735936	46029 MO	-666.9
SMVBEXAR	2024 R86656	2760206	46080 IS	-66.81
SMVBEXAR	2024 R86656	2760206	46080 MO	-89.1
SMVBEXAR	2024 R86657	2764839	46108 IS	-500
SMVBEXAR	2024 R86657	2764839	46108 MO	-666.9
SMVBEXAR	2024 R87230	2715997	46021 IS	-208.47
SMVBEXAR	2024 R87230	2715997	46021 MO	-278.06
SMVBEXAR	2024 R87421	2764840	46108 IS	-500
SMVBEXAR	2024 R87421	2764840	46108 MO	-666.9
SMVBEXAR	2024 R84635	2732126	46022 IS	-500
SMVBEXAR	2024 R84635	2732126	46022 MO	-666.9

SMVBEXAR	2024 R84593	2712616	46007 IS	-500
SMVBEXAR	2024 R84593	2712616	46007 MO	-666.9
SMVBEXAR	2024 R84489	2715991	46021 IS	-500
SMVBEXAR	2024 R84489	2715991	46021 MO	-666.9
SMVBEXAR	2024 R84496	2711089	46001 IS	-16.39
SMVBEXAR	2024 R84496	2711089	46001 MO	-21.87
SMVBEXAR	2024 R82718	2760208	46080 IS	-500
SMVBEXAR	2024 R82718	2760208	46080 MO	-666.9
SMVBEXAR	2024 R84591	2712615	46007 IS	-500
SMVBEXAR	2024 R84591	2712615	46007 MO	-666.9
SMVBEXAR	2024 R84558	2764838	46108 IS	-1269.58

15MO, 15IS

TOTAL	-994363.94
M&O	-569074.24
I&S	-425289.70

Back to Source Documentation Links

MEDINA County

2026 CERTIFIED TOTALS

SMV - MEDINA VALLEY ISD

ARB Approved Totals

As of Certification

Property Count: 20,285

7/24/2026 4:45:32PM

Land	Value
Homesite:	559,606,903
Non Homesite:	529,206,340
Ag Market:	1,022,417,272
Timber Market:	0

Improvement	Value
Homesite:	2,265,955,014
Non Homesite:	860,609,556

Non Real	Count	Value
Personal Property:	840	697,224,560
Mineral Property:	95	4,447,060
Autos:	0	0

Ag	Non Exempt	Exempt
Total Productivity Market:	1,021,953,042	464,230
Ag Use:	23,050,895	6,320
Timber Use:	0	0
Productivity Loss:	998,902,147	457,910

Total Land	(+)	2,111,230,515
Total Improvements	(+)	3,126,564,570
Total Non Real	(+)	701,671,620
Market Value	=	5,939,466,705
Productivity Loss	(-)	998,902,147
Appraised Value	=	4,940,564,558
Homestead Cap	(-)	43,374,771
23.231 Cap	(-)	35,919,091
Assessed Value	=	4,861,270,696
Total Exemptions Amount (Breakdown on Next Page)	(-)	1,610,100,206
Net Taxable	=	3,251,170,490

17A

Freeze	Assessed	Taxable	Actual Tax	Ceiling	Count
DP	23,546,804	7,511,664	62,318.77	88,382.87	118
OV65	694,601,343	266,505,791	1,910,053.09	2,284,371.95	2,396
Total	718,148,147	274,017,455	1,972,371.86	2,372,754.82	2,514
Tax Rate	1.1527000				

Transfer	Assessed	Taxable	Post % Taxable	Adjustment	Count
OV65	1,398,470	515,225	147,190	368,035	5
Total	1,398,470	515,225	147,190	368,035	5

Freeze Taxable	(-)	274,017,455
Transfer Adjustment	(-)	368,035
Freeze Adjusted Taxable	=	2,976,785,000

APPROXIMATE LEVY = (FREEZE ADJUSTED TAXABLE * (TAX RATE / 100)) + ACTUAL TAX
36,285,772.56 = 2,976,785,000 * (1.1527000 / 100) + 1,972,371.86

Certified Estimate of Market Value:	5,939,466,705
Certified Estimate of Taxable Value:	3,251,170,490
Tax Increment Finance Value:	0
Tax Increment Finance Levy:	0.00

Bexar County

2026 CERTIFIED TOTALS

68 - MEDINA VALLEY ISD

ARB Approved Totals

As of Certification

Property Count: 19,497

7/18/2026 10:13:57AM

Land	Value
Homesite:	874,333,421
Non Homesite:	458,454,776
Ag Market:	283,568,606
Timber Market:	0

Improvement	Value
Homesite:	3,182,310,944
Non Homesite:	394,451,467

Non Real	Count	Value
Personal Property:	239	68,986,214
Mineral Property:	0	0
Autos:	0	0

Ag	Non Exempt	Exempt
Total Productivity Market:	283,568,606	0
Ag Use:	1,036,446	0
Timber Use:	0	0
Productivity Loss:	282,532,160	0

Total Land	(+)	1,616,356,803
Total Improvements	(+)	3,576,762,411
Total Non Real	(+)	68,986,214
Market Value	=	5,262,105,428
Productivity Loss	(-)	282,532,160
Appraised Value	=	4,979,573,268
Homestead Cap	(-)	27,235,436
23.231 Cap	(-)	11,999,976
Assessed Value	=	4,940,337,856
Total Exemptions Amount (Breakdown on Next Page)	(-)	1,750,026,974
Net Taxable	=	3,190,310,882

17A

Freeze	Assessed	Taxable	Actual Tax	Ceiling	Count
DP	21,109,436	4,938,481	31,035.84	39,172.79	81
OV65	265,024,885	78,494,988	493,094.77	567,035.24	908
Total	286,134,321	83,433,469	524,130.61	606,208.03	989
Tax Rate	1.1527000				

Freeze Taxable	(-)	83,433,469
Freeze Adjusted Taxable	=	3,106,877,413

APPROXIMATE LEVY = (FREEZE ADJUSTED TAXABLE * (TAX RATE / 100)) + ACTUAL TAX
36,337,106.55 = 3,106,877,413 * (1.1527000 / 100) + 524,130.61

Calculated Estimate of Market Value:	5,262,105,428
Calculated Estimate of Taxable Value:	3,190,310,882
Tax Increment Finance Value:	0
Tax Increment Finance Levy:	0.00

MEDINA County

2026 CERTIFIED TOTALS

SMV - MEDINA VALLEY ISD

As of Certification

Median Homestead Value

Category A and E

Count of HS Residences	Median Market	Median HS Exemption	Median Taxable
7,432	$323,365	$140,000	$183,365

Category A Only

Count of HS Residences	Median Market	Median HS Exemption	Median Taxable
6,774	$323,054	$140,000	$183,054

Lower Value Used

Count of Protested Properties	Total Market Value	Total Value Used
93	$46,809,013	18A $33,507,129

18B **Uncontested Value**

Count of Uncontested Properties	Total Market Value	Total Uncontested Value

Bexar County

2026 CERTIFIED TOTALS

68 - MEDINA VALLEY ISD

Under ARB Review Totals

As of Certification

Property Count: 1,089

7/18/2026 10:13:57AM

Land	Value
Homesite:	63,112,478
Non Homesite:	3,660,220
Ag Market:	7,293,426
Timber Market:	0

Improvement	Value
Homesite:	223,726,672
Non Homesite:	243,371

Non Real	Count	Value
Personal Property:	5	344,019
Mineral Property:	0	0
Autos:	0	0

Ag	Non Exempt	Exempt
Total Productivity Market:	7,293,426	0
Ag Use:	10,370	0
Timber Use:	0	0
Productivity Loss:	7,283,056	0

Total Land	(+)	74,066,124
Total Improvements	(+)	223,970,043
Total Non Real	(+)	344,019
Market Value	=	298,380,186
Productivity Loss	(-)	7,283,056
Appraised Value	=	291,097,130
Homestead Cap	(-)	713,667
23.231 Cap	(-)	132,841
Assessed Value	=	290,250,622
Total Exemptions Amount (Breakdown on Next Page)	(-)	89,380,969
Net Taxable	=	200,869,653

18A

Freeze	Assessed	Taxable	Actual Tax	Ceiling	Count
DP	754,302	165,410	642.52	642.52	3
DPS	260,000	120,000	658.88	658.88	1
OV65	18,231,261	6,191,538	48,536.86	53,672.03	60
Total	19,245,563	6,476,948	49,838.26	54,973.43	64

Tax Rate 1.1527000

Freeze Taxable	(-)	6,476,948
Freeze Adjusted Taxable	=	194,392,705

APPROXIMATE LEVY = (FREEZE ADJUSTED TAXABLE * (TAX RATE / 100)) + ACTUAL TAX
2,290,602.97 = 194,392,705 * (1.1527000 / 100) + 49,838.26

Calculated Estimate of Market Value:	280,316,122
Calculated Estimate of Taxable Value:	185,131,632
Tax Increment Finance Value:	0
Tax Increment Finance Levy:	0.00

MEDINA County

2026 CERTIFIED TOTALS

SMV - MEDINA VALLEY ISD

Grand Totals

As of Certification

Property Count: 20,378

7/24/2026 4:45:32PM

Land	Value
Homesite:	562,379,596
Non Homesite:	537,338,578
Ag Market:	1,027,274,492
Timber Market:	0

Improvement	Value
Homesite:	2,282,099,346
Non Homesite:	875,512,086

Non Real	Count	Value
Personal Property:	840	697,224,560
Mineral Property:	95	4,447,060
Autos:	0	0

Ag	Non Exempt	Exempt
Total Productivity Market:	1,026,810,262	464,230
Ag Use:	23,157,235	6,320
Timber Use:	0	0
Productivity Loss:	1,003,653,027	457,910

Total Land	(+)	2,126,992,666
Total Improvements	(+)	3,157,611,432
Total Non Real	(+)	701,671,620
Market Value	=	5,986,275,718
Productivity Loss	(-)	1,003,653,027
Appraised Value	=	4,982,622,691
Homestead Cap	(-)	43,480,385
23.231 Cap	(-)	36,036,831
Assessed Value	=	4,903,105,475
Total Exemptions Amount (Breakdown on Next Page)	(-)	1,615,616,325
Net Taxable	=	3,287,489,150

Freeze	Assessed	Taxable	Actual Tax	Ceiling	Count
DP	23,546,804	7,511,664	62,318.77	88,382.87	118
OV65	698,552,235	269,056,683	1,931,734.28	2,308,042.55	2,403
Total	722,099,039	276,568,347	1,994,053.05	2,396,425.42	2,521
Tax Rate	1.1527000				

Transfer	Assessed	Taxable	Post % Taxable	Adjustment	Count
OV65	1,398,470	515,225	147,190	368,035	5
Total	1,398,470	515,225	147,190	368,035	5

Freeze Taxable	(-) 19	276,568,347
Transfer Adjustment	(-)	368,035
Freeze Adjusted Taxable	=	3,010,552,768

APPROXIMATE LEVY = (FREEZE ADJUSTED TAXABLE * (TAX RATE / 100)) + ACTUAL TAX
36,696,694.81 = 3,010,552,768 * (1.1527000 / 100) + 1,994,053.05

Certified Estimate of Market Value:	5,982,445,485
Certified Estimate of Taxable Value:	3,284,677,619
Tax Increment Finance Value:	0
Tax Increment Finance Levy:	0.00

Bexar County

2026 CERTIFIED TOTALS

68 - MEDINA VALLEY ISD

Grand Totals

As of Certification

Property Count: 20,586

7/18/2026 10:13:57AM

Land	Value
Homesite:	937,445,899
Non Homesite:	462,114,996
Ag Market:	290,862,032
Timber Market:	0

Improvement	Value
Homesite:	3,406,037,616
Non Homesite:	394,694,838

Non Real	Count	Value
Personal Property:	244	69,330,233
Mineral Property:	0	0
Autos:	0	0

Ag	Non Exempt	Exempt
Total Productivity Market:	290,862,032	0
Ag Use:	1,046,816	0
Timber Use:	0	0
Productivity Loss:	289,815,216	0

Total Land	(+)	1,690,422,927
Total Improvements	(+)	3,800,732,454
Total Non Real	(+)	69,330,233
Market Value	=	5,560,485,614
Productivity Loss	(-)	289,815,216
Appraised Value	=	5,270,670,398
Homestead Cap	(-)	27,949,103
23.231 Cap	(-)	12,132,817
Assessed Value	=	5,230,588,478
Total Exemptions Amount (Breakdown on Next Page)	(-)	1,839,407,943
Net Taxable	=	3,391,180,535

Freeze	Assessed	Taxable	Actual Tax	Ceiling	Count
DP	21,863,738	5,103,891	31,678.36	39,815.31	84
DPS	260,000	120,000	658.88	658.88	1
OV65	283,256,146	84,686,526	541,631.63	620,707.27	968
Total	305,379,884	89,910,417	573,968.87	661,181.46	1053
Tax Rate	1.1527000				

Freeze Taxable	(-)	89,910,417
Freeze Adjusted Taxable	=	3,301,270,118

APPROXIMATE LEVY = (FREEZE ADJUSTED TAXABLE * (TAX RATE / 100)) + ACTUAL TAX
38,627,709.52 = 3,301,270,118 * (1.1527000 / 100) + 573,968.87

Calculated Estimate of Market Value:	5,542,421,550
Calculated Estimate of Taxable Value:	3,375,442,514
Tax Increment Finance Value:	0
Tax Increment Finance Levy:	0.00

Zero Value Confirmation

Tax Year 2026 · Generated August 09, 2026

District: MEDINA VALLEY ISD
Submitted by: Johnette Dixon, Chief Appraiser
Office: Medina County Appraisal District

SB 1023 (2025) requires that truth-in-taxation calculations include hyperlinks to source documents. The individual above has confirmed that the fields listed below carry a value of zero and that no supporting source documents exist or are applicable for the current tax year.

Field	Form	Confirmed on
Form 50-859, Line 20: Anticipated contested value	50-859	August 09, 2026

Texas Education Agency

Tax Year 2026 (School Year 2026-2027)

Preliminary Maximum Compressed Tax Rate (MCR)

August 5, 2026

District Number	District Name	Tax Year 2026 MCR
070915	MAYPEARL ISD	**0.5900**
108906	MCALLEN ISD	**0.6254**
231901	MCCAMEY ISD	**0.6254**
011905	MCDADE ISD	**0.6169**
161909	MCGREGOR ISD	**0.6169**
043907	MCKINNEY ISD	**0.5764**
090903	MCLEAN ISD	**0.5883**
034906	MCLEOD ISD	**0.6192**
162904	MCMULLEN COUNTY ISD	**0.6002**
223902	MEADOW ISD	**0.6254**
010901	MEDINA ISD	**0.6169**
163908	MEDINA VALLEY ISD	**0.5766**
043908	MELISSA ISD	**0.5628**
096904	MEMPHIS ISD	**0.6254**
164901	MENARD ISD	**0.6126**
108907	MERCEDES ISD	**0.5871**
018902	MERIDIAN ISD	**0.5827**
221904	MERKEL ISD	**0.5785**
057914	MESQUITE ISD	**0.5962**
147903	MEXIA ISD	**0.5779**
062906	MEYERSVILLE ISD	**0.6169**
197902	MIAMI ISD	**0.6192**
165901	MIDLAND ISD	**0.5814**
070908	MIDLOTHIAN ISD	**0.5669**
039905	MIDWAY ISD	**0.6254**
161903	MIDWAY ISD	**0.5889**
166903	MILANO ISD	**0.5876**
175910	MILDRED ISD	**0.5838**
200902	MILES ISD	**0.6169**
070909	MILFORD ISD	**0.5757**
112907	MILLER GROVE ISD	**0.6169**
184904	MILLSAP ISD	**0.6091**
250903	MINEOLA ISD	**0.6101**
182903	MINERAL WELLS ISD	**0.6133**
108908	MISSION CISD	**0.6140**
238902	MONAHANS-WICKETT-PYOTE ISD	**0.6192**
169908	MONTAGUE ISD	**0.6084**
108915	MONTE ALTO ISD	**0.6169**
170903	MONTGOMERY ISD	**0.5977**
161910	MOODY ISD	**0.6169**
209902	MORAN ISD	**0.6116**
018903	MORGAN ISD	**0.5988**

All-annual-Ad Valorem - I-S Tax

Date	Principal	Interest	Compounded Intere	Total	Fiscal Year Total
2026	6,618,795.00	29,040,391.77	1,026,205.00	36,685,391.77	36,685,391.77
2027	9,152,884.70	29,074,288.76	362,115.30	38,589,288.76	38,589,288.76
2028	10,350,000.00	28,611,463.76		38,961,463.76	38,961,463.76
2029	10,570,000.00	28,376,478.76		38,946,478.76	38,946,478.76
2030	11,100,000.00	28,121,493.76		39,221,493.76	39,221,493.76
2031	11,645,000.00	27,576,993.76		39,221,993.76	39,221,993.76
2032	12,695,000.00	27,017,918.76		39,712,918.76	39,712,918.76
2033	16,235,000.00	26,377,118.76		42,612,118.76	42,612,118.76
2034	16,980,000.00	25,640,318.76		42,620,318.76	42,620,318.76
2035	17,770,000.00	24,850,168.76		42,620,168.76	42,620,168.76
2036	18,595,000.00	24,022,668.76		42,617,668.76	42,617,668.76
2037	19,460,000.00	23,156,118.76		42,616,118.76	42,616,118.76
2038	20,335,000.00	22,249,393.76		42,584,393.76	42,584,393.76
2039	21,285,000.00	21,302,168.76		42,587,168.76	42,587,168.76
2040	22,265,000.00	20,320,893.76		42,585,893.76	42,585,893.76
2041	23,280,000.00	19,302,618.76		42,582,618.76	42,582,618.76
2042	24,350,000.00	18,216,243.76		42,566,243.76	42,566,243.76
2043	25,480,000.00	17,058,418.76		42,538,418.76	42,538,418.76
2044	26,655,000.00	15,846,243.76		42,501,243.76	42,501,243.76
2045	27,895,000.00	14,576,993.76		42,471,993.76	42,471,993.76
2046	29,145,000.00	13,288,337.51		42,433,337.51	42,433,337.51
2047	30,285,000.00	11,948,581.26		42,233,581.26	42,233,581.26
2048	31,575,000.00	10,570,906.26		42,145,906.26	42,145,906.26
2049	32,875,000.00	9,191,756.26		42,066,756.26	42,066,756.26
2050	34,190,000.00	7,789,118.76		41,979,118.76	41,979,118.76
2051	35,630,000.00	6,345,950.01		41,975,950.01	41,975,950.01
2052	37,150,000.00	4,829,193.76		41,979,193.76	41,979,193.76
2053	38,730,000.00	3,246,768.76		41,976,768.76	41,976,768.76
2054	6,220,000.00	2,279,071.88		8,499,071.88	8,499,071.88
2055	5,875,000.00	1,965,206.25		7,840,206.25	7,840,206.25
2056	6,195,000.00	1,648,368.75		7,843,368.75	7,843,368.75
2057	6,525,000.00	1,314,468.75		7,839,468.75	7,839,468.75
2058	6,880,000.00	962,587.50		7,842,587.50	7,842,587.50
2059	7,250,000.00	591,675.00		7,841,675.00	7,841,675.00
2060	7,645,000.00	200,681.25		7,845,681.25	7,845,681.25
Total	668,886,679.70	546,911,070.17	1,388,320.30	1,217,186,070.17	1,217,186,070.17

Melissa Lutz, PCC, CTOP

Medina County Tax Assessor/Collector
1502 Ave. M.
Hondo, TX 78861
830-741-6100

August 10, 2026

33A

In accordance with, Property Tax Code Section 26.04 (h), pertaining to Tax Rate Calculation Worksheet number 33A, the Anticipated Collection Rate for Tax Year 2026 is certified by myself, Medina County Tax Assessor/Collector, as an anticipated 100%.

Digitally signed by Melissa Lutz

Melissa Lutz, PCC, CTOP

Back to Source Documentation Links

Recap & Standings Report

MEDINACAD

Cycles: **All** Taxing Units: **City of Cast...** Transaction Date Range: **10/01/2025 to 07/25/2026** Sorted By: **By Year, Ascending** Options: **Separate Rollbacks, Include**

Appraisal

SMV (Medina Valley ISD)

2025 Fiscal Year: 09/01/2025 - 08/31/2026

	Original Roll	Beg. Uncollected	Adjustments	Adjusted Uncollected	Collections	P&I Collected	Credits / Discounts Allowed	Atty. Fee Collected	Variance	Uncollected Balance	YTD Collections
2007 & prior	20,997,853.21	97,902.57	0.00	97,902.57	0.00	0.00	1,775.62	0.00	0.00	96,126.95	1,775.62
2008	9,668,394.00	3,855.61	0.00	3,855.61	0.00	0.00	0.00	0.00	0.00	3,855.61	0.00
2009	10,151,983.98	4,172.31	0.00	4,172.31	0.00	0.00	0.00	0.00	0.00	4,172.31	0.00
2010	10,501,841.24	6,479.69	0.00	6,479.69	184.91	158.38	0.00	0.00	0.00	6,294.78	184.91
2011	11,094,578.87	7,497.89	0.00	7,497.89	47.55	56.31	491.68	16.45	0.00	6,958.66	543.25
2012	11,542,176.01	8,212.86	0.00	8,212.86	76.68	81.62	507.79	24.68	0.00	7,628.39	584.47
2013	12,234,033.54	8,176.98	0.00	8,176.98	362.94	393.31	901.63	126.93	0.00	6,912.41	1,488.15
2014	12,765,225.08	10,759.42	0.00	10,759.42	1,632.88	2,361.83	881.44	798.90	0.00	8,245.10	2,658.07
2015	12,993,099.50	38,875.92	0.00	38,875.92	230.09	281.29	26,964.47	96.11	0.00	11,681.36	27,236.65
2016	14,559,932.13	30,018.24	0.00	30,018.24	410.27	483.80	15,632.01	178.82	0.00	13,975.96	16,224.34
2017	15,387,876.98	17,656.28	0.00	17,656.28	1,042.00	1,105.42	93.69	429.48	0.00	16,520.59	1,135.69
2018	17,279,557.33	19,172.35	0.00	19,172.35	2,023.95	1,918.07	93.69	787.52	0.00	17,054.71	2,226.82
2019	18,153,905.88	25,223.38	0.00	25,223.38	898.44	419.57	92.77	98.50	0.00	24,232.17	1,132.68
2020	19,032,730.94	30,964.55	-406.83	30,557.72	3,305.88	2,693.15	91.54	1,269.58	0.00	27,160.30	3,584.65
2021	22,116,937.85	58,393.12	-1,944.93	56,448.19	15,579.42	9,825.59	123.00	4,919.04	-0.02	40,745.75	15,691.53
2022	25,479,422.91	109,647.68	-3,021.70	106,625.98	31,189.70	13,546.85	134.80	7,257.63	0.00	75,301.48	33,313.10
2023	24,967,083.65	166,215.33	-61,371.74	104,843.59	-8,795.18	15,578.87	118.84	10,881.00	-1.00	113,518.93	-4,429.34
2024	30,267,917.51	481,294.83	-126,535.31	354,759.52	128,399.15	55,525.01	118.59	53,976.47	-1.15	226,240.63	155,366.31
2025	33,680,689.79	0.00	32,790,782.45	32,790,782.45	32,156,411.66	136,951.23	-18,895.56	14,555.89	0.74	653,267.09	32,137,515.36
2026	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2027	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Summary

Total Current	33,680,689.79	0.00	32,790,782.45	32,790,782.45	32,156,411.66	136,951.23	-18,895.56	14,555.89	0.74	653,267.09	32,137,515.36
Total Delinquent	299,194,550.61	1,124,519.01	-193,280.51	931,238.50	176,588.68	104,429.07	48,021.56	80,861.11	-2.17	706,626.09	258,716.90
Rollbacks		1,634.92	28,652.54	30,287.46	30,287.46	406.29	0.00	408.28	0.00	0.00	30,287.46
Taxing Unit Total	332,875,240.40	1,126,153.93	32,626,154.48	33,752,308.41	32,363,287.80	241,786.59	29,126.00	95,825.28	-1.43	1,359,893.18	32,426,519.72

Percentages

% of Roll Collected - 2025 - 98.01%	Adjusted Original Roll -- $32,790,782.45	Current YTD Collections -- $32,137,515.36
Tax Collections Compared to Current Taxes Billed 0% Collected		
All Collections Compared to Current Taxes Billed 0% Collected		
Combined Collections (Collections + P&I Collected) -- 32,605,074.39		

Recap & Standings Report

MEDINACAD

Cycles: **All** Taxing Units: **City of Cast...** Transaction Date Range: **10/01/2024 to 09/30/2025** Sorted By: **By Year, Ascending** Options: **Separate Rollbacks, Include**

Appraisal

SMV (Medina Valley ISD)

2024 Fiscal Year: 09/01/2024 - 08/31/2025

	Original Roll	Beg. Uncollected	Adjustments	Adjusted Uncollected	Collections	P&I Collected	Credits / Discounts Allowed	Atty. Fee Collected	Variance	Uncollected Balance	YTD Collections
2007 & prior	20,997,853.21	102,204.39	0.00	102,204.39	239.65	573.26	4,062.17	162.58	0.00	97,902.57	7,128.35
2008	9,668,394.00	4,098.21	0.00	4,098.21	0.00	0.00	242.60	0.00	0.00	3,855.61	1,178.12
2009	10,151,983.98	4,414.91	0.00	4,414.91	0.00	0.00	242.60	0.00	0.00	4,172.31	1,185.54
2010	10,501,841.24	6,658.50	0.00	6,658.50	104.45	107.14	74.36	30.92	0.00	6,479.69	1,128.56
2011	11,094,578.87	7,576.81	0.00	7,576.81	4.02	4.66	74.90	1.40	0.00	7,497.89	165.53
2012	11,542,176.01	8,475.12	0.00	8,475.12	185.87	301.12	76.39	97.39	0.00	8,212.86	1,494.28
2013	12,234,033.54	8,663.97	0.00	8,663.97	379.58	550.37	107.41	184.29	0.00	8,176.98	803.42
2014	12,765,225.08	11,652.11	0.00	11,652.11	760.81	849.14	131.88	281.03	0.00	10,759.42	1,262.12
2015	12,993,099.50	39,008.93	0.00	39,008.93	76.51	70.22	56.50	19.20	0.00	38,875.92	133.01
2016	14,559,932.13	30,451.18	0.00	30,451.18	350.33	388.06	82.61	146.37	0.00	30,018.24	433.50
2017	15,387,876.98	18,607.90	0.00	18,607.90	450.31	433.00	501.31	174.29	0.00	17,656.28	1,051.56
2018	17,279,557.33	23,928.60	-89.44	23,839.16	2,430.84	2,054.45	2,235.97	879.85	0.00	19,172.35	5,440.91
2019	18,153,905.88	31,810.15	-532.59	31,277.56	4,037.47	3,224.32	2,016.71	1,496.90	0.00	25,223.38	6,558.62
2020	19,032,730.94	38,936.05	-3,780.01	35,156.04	2,319.43	3,574.75	1,872.06	1,815.03	0.00	30,964.55	4,477.51
2021	22,116,937.85	77,984.48	-10,811.04	67,173.44	7,360.11	9,132.70	1,420.21	5,160.49	0.00	58,393.12	11,437.64
2022	25,479,422.91	200,807.24	-37,944.64	162,862.60	51,782.64	32,823.76	1,434.94	23,151.87	2.66	109,647.68	54,318.12
2023	24,967,083.65	398,880.94	-196,980.02	201,900.92	35,527.84	51,860.38	160.70	51,148.75	2.95	166,215.33	42,294.72
2024	30,267,917.51	0.00	29,748,516.19	29,748,516.19	29,292,834.48	138,598.67	-25,600.37	36,622.10	12.75	481,294.83	29,267,221.36
2025	33,680,689.79	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2026	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2027	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Summary											
Total Current	63,948,607.30	0.00	29,748,516.19	29,748,516.19	29,292,834.48	138,598.67	-25,600.37	36,622.10	12.75	481,294.83	29,267,221.36
Total Delinquent	268,926,633.10	1,014,159.49	-250,137.74	764,021.75	106,009.86	105,947.33	14,793.32	84,750.36	5.61	643,224.18	140,491.51
Rollbacks		254,963.60	102,706.86	357,670.46	356,035.54	0.00	0.00	0.00	0.00	1,634.92	370,220.19
Taxing Unit Total	332,87[illegible]	1,269,123.09	29,601,085.31	30,870,208.40	29,754,879.88	244,546.00	-10,807.05	121,372.46	18.36	1,126,153.93	29,777,933.06

33C

Percentages		
% of Roll Collected - 2024 - 98.38%	Adjusted Original Roll -- $29,748,516.19	Current YTD Collections -- $29,267,221.36
Tax Collections Compared to Current Taxes Billed 0% Collected		
All Collections Compared to Current Taxes Billed 0% Collected		
Combined Collections (Collections + P&I Collected) -- 29,999,425.88		

Recap & Standings Report

MEDINACAD

Cycles: **All** Taxing Units: **City of Cast...** Transaction Date Range: **10/01/2023 to 09/30/2024** Sorted By: **By Year, Ascending** Options: **Separate Rollbacks, Include**

Appraisal

SMV (Medina Valley ISD)

2023 Fiscal Year: 09/01/2023 - 08/31/2024

	Original Roll	Beg. Uncollected	Adjustments	Adjusted Uncollected	Collections	P&I Collected	Credits / Discounts Allowed	Atty. Fee Collected	Variance	Uncollected Balance	YTD Collections
2007 & prior	20,997,853.21	124,890.39	0.00	124,890.39	1,143.15	2,558.70	21,542.85	740.37	0.00	102,204.39	22,744.77
2008	9,668,394.00	5,240.28	0.00	5,240.28	0.00	0.00	1,142.07	0.00	0.00	4,098.21	1,157.38
2009	10,151,983.98	6,335.55	0.00	6,335.55	0.00	0.00	1,920.64	0.00	0.00	4,414.91	1,936.78
2010	10,501,841.24	8,640.72	0.00	8,640.72	29.05	37.19	1,953.17	8.59	0.00	6,658.50	1,998.34
2011	11,094,578.87	8,689.20	0.00	8,689.20	15.16	20.16	1,097.23	5.25	0.00	7,576.81	1,128.77
2012	11,542,176.01	10,047.95	0.00	10,047.95	125.29	185.42	1,447.54	62.14	0.00	8,475.12	1,589.45
2013	12,234,033.54	9,511.94	0.00	9,511.94	0.00	0.00	847.97	0.00	0.00	8,663.97	864.59
2014	12,765,225.08	12,864.25	0.00	12,864.25	362.41	433.42	849.73	150.35	0.00	11,652.11	1,307.64
2015	12,993,099.50	39,855.77	0.00	39,855.77	306.45	340.87	540.39	129.47	0.00	39,008.93	905.04
2016	14,559,932.13	31,589.56	0.00	31,589.56	545.00	529.95	593.38	199.51	0.00	30,451.18	1,156.27
2017	15,387,876.98	21,476.68	-663.04	20,813.64	1,809.82	1,587.45	395.92	668.43	0.00	18,607.90	2,245.65
2018	17,279,557.33	27,118.31	-693.69	26,424.62	1,899.42	1,446.04	596.60	657.78	0.00	23,928.60	2,598.89
2019	18,153,905.88	39,974.54	-2,739.29	37,235.25	4,732.65	3,555.05	693.55	1,834.37	1.10	31,810.15	5,987.68
2020	19,032,730.94	54,402.47	-4,328.39	50,074.08	10,804.68	5,332.04	333.35	3,115.60	0.00	38,936.05	13,531.46
2021	22,116,937.85	131,919.83	-50,486.26	81,433.57	2,910.71	17,889.45	539.22	12,807.56	0.84	77,984.48	-6,995.89
2022	25,479,422.91	415,414.54	-228,030.71	187,383.83	-13,460.72	46,815.48	36.62	46,432.16	-0.69	200,807.24	-65,708.83
2023	24,967,083.65	0.00	23,907,098.08	23,907,098.08	23,551,463.95	147,213.33	-43,234.34	58,387.85	12.47	398,880.94	23,508,217.14
2024	30,267,917.51	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2025	33,680,689.79	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2026	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2027	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Summary

Total Current	88,915,690.95	0.00	23,907,098.08	23,907,098.08	23,551,463.95	147,213.33	-43,234.34	58,387.85	12.47	398,880.94	23,508,217.14
Total Delinquent	243,959,549.45	947,971.98	-286,941.38	661,030.60	11,223.07	80,731.22	34,530.23	66,811.58	1.25	615,278.55	-13,552.01
Rollbacks		74,586.53	306,950.89	381,537.42	126,573.80	3,225.95	0.00	0.00	-0.02	254,963.60	126,573.82
Taxing Unit Total	332,875,240.40	1,022,558.51	23,927,107.59	24,949,666.10	23,689,260.82	231,170.50	-8,704.11	125,199.43	13.70	1,269,123.09	23,621,238.95

Percentages

% of Roll Collected - 2023 - 98.33%	Adjusted Original Roll -- $23,907,098.08	Current YTD Collections -- $23,508,217.14
Tax Collections Compared to Current Taxes Billed 0% Collected		
All Collections Compared to Current Taxes Billed 0% Collected		
Combined Collections (Collections + P&I Collected) -- 23,920,431.32		

Agenda Item Memorandum

To: MVISD Board of Trustees
Date: August 24, 2026
Agenda item: Consider approval of 2026-2027 Budget Line-Items over $50,000

Background Information:
Per Board policy CH (Local) the Board shall approve all single purchases over $50,000. This action will allow the Board to review and consider approval of the single line-items that are currently included within the proposed budget. This process will reduce the number of items presented to the Board throughout the year and provide a more efficient method of acquiring needed items.

Administrative Consideration:

- Administration requests that the Board review and consider the attached list of line-items over $50,000 for approval.
- All purchases will be procured in accordance with Board policies CH Legal and Local.

Supporting Documents:

- List of line-items with funding source and explanation of purchase

Recommendation:
It is recommended that the Board consider approval of the 2026-2027 budget line-items over $50,000 as presented.

8449 FM 471 S., Castroville, TX 78009 • www.mvisd.com

Agenda Item Memorandum

To: Medina Valley ISD Board of Trustees
Date: August 24, 2026
Agenda Item: Consider approval of 2026-2027 Budget Line-Items over $50,000

$50,000 + Budget Expenditures for 2026-2027 School Year

Pursuant to Board policy CH Local, the Board may approve single expenditures that are expected to exceed $50,000 as line items in the budget. Below are the expenditures that will be submitted for approval within the 2026-2027 budget:

3-D Landscaping (199)	$	85,000
95 Percent Group (410)	$	64,202
ABIP, PC (199)	$	57,000
Age of Learning (211-11)	$	78,400
Bexar County Appraisal District (199)	$	210,000
ETJ Consulting (199)	$	89,000
Flowers (240)	$	72,000
Gulf Coast (240)	$	255,000
Hardie's Fresh Foods (240)	$	195,000
Houghton Mifflin Harcourt (410)	$	123,375
Imagine Learning (199)	$	79,950
Incident IQ (199)	$	50,353
Intech Southwest (199)	$	55,000
J Cruz & Associates (199)	$	200,000
Labatt Institutional Supply Co. (240)	$	2,825,883

Labatt Institutional Supply Co. (240)	$	118,800
Medina County Appraisal District (199)	$	510,000
Medina County Tax Office (199)	$	60,000
Newsela (199)	$	58,625
Northside ISD (199)	$	100,000
Oak Farms Dairy (240)	$	675,000
Parent Square (199)	$	82,412
Republic Services (199)	$	200,000
Samegoal (199)	$	71,963
SchooLinks (199)	$	65,745
School Therapy Services (224)	$	100,000
Skyward (199)	$	129,000
Sysco (240)	$	55,000
TASB Rick Management (199)	$	1,418,114
TX-STAR (224)	$	70,125
Walsh, Gallegos, Kyle, Robinson & Roalson P.C. (199/624)	$	280,000
Zayo (199)	$	73,712

This measure will eliminate the need for future Board approvals for these listed purchases only during the 2026-2027 budget year. All purchases will be procured in accordance with Board policies CH Legal and Local.

Agenda Item Memorandum

To: MVISD Board of Trustees
Date: August 24, 2026
Agenda item: Consider approval of the 2025-2026 Final Amended Budget

Background Information
The 2025-2026 budgets have been approved by the Board of Trustees. Amendments to that budget must also be Board approved.

Administrative Consideration
- The final amended budget is presented to ensure the district does not exceed any functional area when accruals and other year end entries are made. This is not a reflection of our expected end of year financial position.

Supporting Documents
- Final Amended Budget worksheet

Recommendation:
Administration recommends that the Board approve the 2025-2026 final amended budgets as presented.

8449 FM 471 S., Castroville, TX 78009 • www.mvisd.com

GENERAL FUND - PROPOSED FINAL AMENDED BUDGET

Estimated Revenues	Adopted Budget	Adjusted Budget	Current Amendment	Final Amended Budget
5700 Local Revenue	$ 40,765,553	$ 40,854,381		$ 40,854,381
5800 State Revenue	$ 71,491,040	$ 71,491,040		$ 71,491,040
5900 Federal Revenue	$ 490,000	$ 490,000		$ 490,000
Total Estimated Revenue	**$ 112,746,593**	**$ 112,835,421**	$ -	**$ 112,835,421**
Appropriations				
11 Instruction	$ 64,463,293	$ 64,846,478	$ (240,000)	$ 64,606,478
12 Instructional Resources and Media Services	$ 644,746	$ 584,391	$ (200,000)	$ 384,391
13 Curriculum and Instructional Staff Development	$ 1,897,351	$ 1,889,319		$ 1,889,319
21 Instructional Leadership	$ 2,094,074	$ 2,122,332	$ 200,000	$ 2,322,332
23 School Leadership	$ 5,756,921	$ 5,806,117		$ 5,806,117
31 Guidance, Counseling and Evaluation Services	$ 4,140,813	$ 4,176,914		$ 4,176,914
32 Social Work Services	$ 625,612	$ 629,185	$ 20,000	$ 649,185
33 Health Services	$ 1,355,949	$ 1,372,834		$ 1,372,834
34 Student Transportation	$ 7,325,773	$ 7,429,765		$ 7,429,765
35 Food Services	$ 165,728	$ 227,897		$ 227,897
36 Extracurricular Activities	$ 2,956,155	$ 3,112,957	$ 20,000	$ 3,132,957
41 General Administration	$ 3,280,329	$ 3,311,082	$ 100,000	$ 3,411,082
51 Facilitiies Maintenance and Operations	$ 10,782,725	$ 10,933,587	$ (500,000)	$ 10,433,587
52 Security and Monitoring Services	$ 1,719,875	$ 2,176,135	$ 250,000	$ 2,426,135
53 Data Processing Services	$ 2,437,753	$ 2,448,412	$ 50,000	$ 2,498,412
61 Community Services	$ 1,000	$ 1,000		$ 1,000
71 Debt Service	$ -	$ -	$ 300,000	$ 300,000
81 Facilities Acquisition and Construction	$ 2,393,496	$ 2,377,217		$ 2,377,217
95 Payments to JJAEP	$ 5,000	$ 5,000		$ 5,000
99 Other Intergovernmental Charges	$ 700,000	$ 686,900		$ 686,900
Total Appropriations	**$ 112,746,593**	**$ 114,137,522**	$ -	**$ 114,137,522**
Net (Revenues Less Appropriations)	**$ -**	**$ (1,302,101)**	$ -	**$ (1,302,101)**

* This is our end of year amendment to ensure we do not exceed any functional area.

CHILD NUTRITION FUND - PROPOSED FINAL AMENDED BUDGET

Estimated Revenues	Adopted Budget	Amended Budget	Current Amendments	Final Amended Budget
5700 Local Revenue	$ 2,244,200	$ 2,244,200	$ -	$ 2,244,200
5800 State Revenue	$ 29,000	$ 29,000	$ -	$ 29,000
5900 Federal Revenue	$ 5,096,171	$ 5,096,171	$ -	$ 5,096,171
Total Estimated Revenue	$ 7,369,371	$ 7,369,371	$ -	$ 7,369,371
Appropriations				
11 Instruction	$ -	$ -	$ -	$ -
12 Instructional Resources and Media Services	$ -	$ -	$ -	$ -
13 Curriculum and Instructional Staff Development	$ -	$ -	$ -	$ -
21 Instructional Leadership	$ -	$ -	$ -	$ -
23 School Leadership	$ -	$ -	$ -	$ -
31 Guidance, Counseling and Evaluation Services	$ -	$ -	$ -	$ -
32 Social Work Services	$ -	$ -	$ -	$ -
33 Health Services	$ -	$ -	$ -	$ -
34 Student Transportation	$ -	$ -	$ -	$ -
35 Food Services	$ 8,374,554	$ 8,374,554	$ -	$ 8,374,554
36 Extracurricular Activities	$ -	$ -	$ -	$ -
41 General Administration	$ -	$ -	$ -	$ -
51 Facilitiies Maintenance and Operations	$ -	$ -	$ -	$ -
52 Security and Monitoring Services	$ -	$ -	$ -	$ -
53 Data Processing Services	$ -	$ -	$ -	$ -
61 Community Services	$ -	$ -	$ -	$ -
71 Debt Service	$ -	$ -	$ -	$ -
81 Facilities Acquisition and Construction	$ -	$ -	$ -	$ -
95 Payments to JJAEP	$ -	$ -	$ -	$ -
99 Other Intergovernmental Charges	$ -	$ -	$ -	$ -
Total Appropriations	**$ 8,374,554**	**$ 8,374,554**	**$ -**	**$ 8,374,554**
Net (Revenues Less Appropriations)	**$ (1,005,183)**	**$ (1,005,183)**		**$ (1,005,183)**

* This is our end of year amendment to ensure we do not exceed any functional area.

DEBT SERVICE FUND - PROPOSED FINAL AMENDED BUDGET

	Estimated Revenues	Adopted Budget	Amended Budget	Current Amendments	Final Amended Budget
5700	Local Revenue	$ 30,092,357	$ 30,092,357	$ -	$ 30,092,357
5800	State Revenue	$ 6,603,098	$ 6,603,098	$ -	$ 6,603,098
5900	Federal Revenue	$ -	$ -	$ -	$ -
Total Estimated Revenue		$ 36,695,455	$ 36,695,455	$ -	$ 36,695,455
Appropriations					
11	Instruction	$ -	$ -	$ -	$ -
12	Instructional Resources and Media Services	$ -	$ -	$ -	$ -
13	Curriculum and Instructional Staff Development	$ -	$ -	$ -	$ -
21	Instructional Leadership	$ -	$ -	$ -	$ -
23	School Leadership	$ -	$ -	$ -	$ -
31	Guidance, Counseling and Evaluation Services	$ -	$ -	$ -	$ -
32	Social Work Services	$ -	$ -	$ -	$ -
33	Health Services	$ -	$ -	$ -	$ -
34	Student Transportation	$ -	$ -	$ -	$ -
35	Food Services	$ -	$ -	$ -	$ -
36	Extracurricular Activities	$ -	$ -	$ -	$ -
41	General Administration	$ -	$ -	$ -	$ -
51	Facilitiies Maintenance and Operations	$ -	$ -	$ -	$ -
52	Security and Monitoring Services	$ -	$ -	$ -	$ -
53	Data Processing Services	$ -	$ -	$ -	$ -
61	Community Services	$ -	$ -	$ -	$ -
71	Debt Service	$ 36,695,455	$ 36,695,455	$ -	$ 36,695,455
81	Facilities Acquisition and Construction	$ -	$ -	$ -	$ -
95	Payments to JJAEP	$ -	$ -	$ -	$ -
99	Other Intergovernmental Charges	$ -	$ -	$ -	$ -
8911	Other Uses	$ -	$ -	$ -	$ -
Total Appropriations		**$ 36,695,455**	**$ 36,695,455**	**$ -**	**$ 36,695,455**
Net (Revenues Less Appropriations)		**$ -**	**$ -**	**$ -**	**$ -**

* This is our end of year amendment to ensure we do not exceed any functional area.

Agenda Item Memorandum

To: MVISD Board of Trustees
Date: August 24, 2026
Agenda item: Consider approval of the 2026-2027 Budgets

Background Information
A public meeting was held as required under Education Code 44.004 to discuss the proposed 2026-2027 budgets and tax rates.

Administrative Consideration

- The 2026-2027 proposed budgets are presented for consideration and possible approval.
- The proposed 2026-2027 budget amounts at the fund and function level are as follows: General Fund (199) - $120,705,685; Debt Service Fund (511) - $38,595,289; and the Child Nutrition Fund (240) - $8,970,128.

Supporting Documents

- 2026-2027 Proposed Budgets by Fund and Function

Recommendation:
Administration recommends that the Board consider approval of the 2026-2027 budgets as presented.

Proposed Budgets 2026-2027					
	By Function	*General Fund*	*Child Nutrition Fund*	*Debt Service Fund*	*Total All Funds*
11	Instruction	$69,968,233			$69,968,233
12	Instructional Resource / Media	$231,910			$231,910
13	Curriculum & Instructional Staff Development	$2,589,066			$2,589,066
21	Instructional Leadership	$2,330,456			$2,330,456
23	School Leadership	$6,410,046			$6,410,046
31	Guidance, Counseling, and Evaluation Services	$4,496,967			$4,496,967
32	Social Work Services	$612,144			$612,144
33	Health Services	$1,545,228			$1,545,228
34	Student (Pupil) Transportation	$5,446,125			$5,446,125
35	Child Nutrition	$108,577	$8,970,128		$9,078,705
36	Co-curricular / Extracurricular Activities	$4,175,080			$4,175,080
41	General Administration	$3,487,794			$3,487,794
51	Plant Maintenance & Operations	$12,065,901			$12,065,901
52	Security & Monitoring Services	$2,306,786			$2,306,786
53	Data Processing Services	$2,872,664			$2,872,664
61	Community Services	$1,000			$1,000
71	Debt Service	$0		$38,595,289	$38,595,289
81	Facilities Acquisition & Construction	$1,302,708			$1,302,708
95	JJAEP Payments	$5,000			$5,000
99	Other Intergovernmental Charges	$750,000			$750,000
	Total Expenditures:	**$120,705,685**	**$8,970,128**	**$38,595,289**	**$168,271,02**

Agenda Item Memorandum

To: MVISD Board of Trustees
Date: August 24, 2026
Agenda item: Consider approval of the resolution to set the Medina Valley Independent School District Tax Rate for 2026

Background Information
Section 26.05(b) of the Property Tax Code prescribes the methods in which the district can adopt its tax rate. Changes were made in the 88th Legislative Session requiring certain language when adopting the tax rate. Although we anticipate that the average homeowner will see a decrease in property taxes this year due to a reduction in the tax rate and stagnate value growth, the resolution must include language specifying that this tax rate will raise more property taxes for maintenance and operations than last year's tax rate. These new taxes will be primarily collected from new taxpayers to the district.

Supporting Documents
- Resolution to Set the Tax Rate

Recommendation
Administration recommends that the Board approve the resolution to set the MVISD tax rate on $100 valuation for the district for the tax year 2026 at a total tax rate of $1.12660/$100, to be assessed and collected by the duly specified assessor and collector as follows:
- $0.62660/$100 for the purpose of maintenance and operations, and
- $0.50000/$100 for the purpose of payment of principal and interest on debts.

MEDINA VALLEY INDEPENDENT SCHOOL DISTRICT

Resolution of the Board to Set Tax Rate

Date: August 24, 2026

On this date, we, the Board of Trustees of the Medina Valley School District, hereby levy or set the tax rate on $100 valuation for the District for the tax year 2026 at a total tax rate of $1.12660, to be assessed and collected by the duly specified assessor and collector as follows:

$0.62660 for the purpose of maintenance and operations, and

$0.50000 for the purpose of payment of principal and interest on debts.

Such taxes are to be assessed and collected by the tax officials designated by the District.

THIS TAX RATE WILL RAISE MORE TAXES FOR MAINTENANCE AND OPERATIONS THAN LAST YEAR'S TAX RATE.

Adopted this 24th of August, 2026 by the Board of Trustees.

Joe Biediger
Presiding Officer, MVISD Board Secretary

Matt Castiglione
MVISD Board Member

8449 FM 471 S., Castroville, TX 78009 • www.mvisd.com

Agenda Item Memorandum

To: MVISD Board of Trustees
Date: August 24, 2026
Agenda item:
Approval of Certification to Be Submitted to TEA Regarding District's Compliance with Texas Education Code Sections 39.0089, 11.005 (c), and 28.002 (h) as Required by Senate Bill 12.

Background Information:
Annually, school districts shall certify to the Texas Education Agency (TEA) that the district is in compliance with Education Code 11.005 (prohibition on DEI duties) and Education Code 28.0022 (instructional requirements and prohibitions).

Funding Source: Not Applicable
Supporting Documents: Memo, Certification template, applicable policies
Recommendation: Administration recommends the board approve the certification template as provided

TEC §39.008: Certification of Compliance with Certain Laws Required

Section 1: School System Information

Name of School District or Charter School: Medina Valley Independent School District

County-District Number (CDN): 163-908

Superintendent/CEO Name: Emily Lorenz

Certification School Year: 2026-2027

Section 2: Description of Required Policies and Procedures

Provide a description or attach a copy of the policies and procedures required by TEC, §§11.005(c) and 28.0022(h) and describe how employees and contractors were notified of these policies and procedures.

After the passage of Senate Bill 12 during the 89th legislative session, Medina Valley ISD undertook the following actions to ensure alignment with updated Education Codes 11.005 and 28.0022:

- Reviewed policies and procedures with the assistance of TASB policy specialists;
- Provided training by legal counsel to all administrators across the district regarding Senate Bill 12 and the required certification;
- Provided training during August preservice to all staff regarding Senate Bill 12 and the required certification;
- Implemented changes per policy revisions in district handbooks and procedural manuals,
- Included Prohibition on Diversity, Equity, and Inclusion in all vendor packets, procurements, and contracts; and
- Adopted policy updates to reflect changes to Education Code.

The following Medina Valley ISD policies were adopted and implemented as required by Education Code 11.005 (prohibition on DEI duties) and Education Code 28.0022 (instructional requirements and prohibitions).

Policy	Description	Adoption Date
BJCF(Local)	Superintendent Nonrenewal: Engaging or assigning DEI duties, as well as instructional activities prohibited by law, were included in the list of reasons the superintendent's contract may be nonrenewed.	5/29/2026
BT(Legal)	Prohibition on Diversity, Equity, and Inclusion Activities: Definitions and prohibited activities and certification requirements.	10/29/2025
CJ(Legal) and (Local)	Contracted Services: Contractors may not engage in or assign instructional activities prohibited by law or DEI duties under SB12. Violations will result in termination of the contract.	10/29/2025
DF(Legal)	Termination of Employment: Addresses the prohibition on DEI and prohibited classroom instruction.	5/29/2026

DFBB(Local)	contract employee may be nonrenewed now includes engaging or assigning DEI duties, as well as instructional activities prohibited by	10/29/2025
DH(Legal) and (Local)	classroom instruction or activities and prohibited DEI duties were	5/29/2026

For the 2025-2026 school year, Medina Valley ISD adopted changed to the following to reflect the updated policies and legal frameworks to ensure compliance with Education Code 11.005(c) and 28.002(h):

- Medina Valley ISD Student Handbooks
- Medina Valley ISD Employee Handbook
- Medina Valley ISD Student Code of Conduct
- Purchasing procedures for contracts, vendor packets, and procurements

Section 3: Policy or Program Changes

Were any existing policies, programs, procedures, or trainings altered to ensure compliance with TEC, §§39.008, 11.005, and 28.0022? ☒ Yes ☐ No

If yes, describe or attach a copy of the changes below.

The following policies and legal framework documents were adopted and implemented to support alignment and implementation of Senate Bill 12 in alignment with Education Code 11.005 (prohibition on DEI duties) and Education Code 28.0022 (instructional requirements and prohibitions).

Policy	Description	Adoption Date
BJA(Legal)	Superintendent: Qualifications and Duties: Updated to include information regarding required certification to TEA.	5/29/2026
BT(Legal)	Prohibition on Diversity, Equity, and Inclusion Activities: Provides definitions and prohibited activities and certification requirements.	10/29/2025
CJ(Legal) and CJ(Local)	New provisions reflect that contractors may not engage in or assign instructional activities prohibited by law or DEI duties under SB 12. Violations will result in termination of the contract.	10/29/2025
CMD(Legal)	Equipment and Supplies Management: Instructional Materials Care and Accounting: States that in providing instructional materials for each subject in the required curriculum and each grade level, the district protects students from obscene or harmful content as necessary for compliance with Education Code 28.0022.	5/29/2026
CQA(Legal)	Technology Resources: District, Campus, and Classroom Websites: Updated the list of required website postings to reflect that a district must post notice at least seven days before the date on which a meeting is held to discuss the certification of compliance with Education Code 11.005 and 28.0022.	5/29/2026

DG(Legal)	Employee Rights and Privileges: Outlines that teachers may not be compelled to discuss a widely debated and currently controversial issue of public policy or social affairs and may not be subject to discipline for an allegation that they did so if they are using SBOE-approved instructional materials and teaching with fidelity.	10/29/2025
EMB(Legal)	Miscellaneous Instructional Policies: Teaching About Controversial Issues: Updated with information from Education Code 28.0022.	11/6/2026
FOA(Legal)	Student Discipline: Removal by Teacher or Bus Driver: States that a teacher may not remove a student from class based on a single incident of behavior if the student is reasonably discussing certain debated and controversial topics subject to Education Code 28.0022.	11/6/2025

Additional local policies adopted and updated by the district in order to maintain compliance with implementation of Senate Bill 12:

AE(Legal): Educational Philosophy

CH(Legal): Purchasing and Acquisition

CV(Legal): Facilities Construction

Section 4: Cost Savings

Were there any cost savings resulting from actions taken to comply with TEC, §39.008? ☐ Yes ☒ No
Total cost savings: $ _____
If yes, describe or attach a copy of the cost savings.

Section 5: Board Approval

Date of Board/Governing Body Meeting: August 24, 2026
Meeting notice was posted on LEA website at least seven days in advance: ☒ Yes ☐ No
Public testimony opportunity provided during meeting: ☒ Yes ☐ No
Certification approved by majority vote: ☐ Yes ☐ No

Section 6: Certification Statement

By signing below, the undersigned certifies that the information contained in this document is true and correct and that the district or charter school is in compliance with the requirements of Texas Education Code §§39.008, 11.005(c), and 28.0022(h).

Superintendent/CEO Signature: _____ Date: _____

SWORN TO AND SUBSCRIBED before me on this _____ day of _____, 20_____.

_____
Notary Public, State of Texas

Reasons

The Board's decision not to renew the Superintendent's contract shall not be based on the Superintendent's exercise of Constitutional rights or based unlawfully on race, color, religion, sex, gender, national origin, age, disability, or any other basis prohibited by law. Reasons for the nonrenewal of the Superintendent's contract shall be:

1. Deficiencies pointed out in evaluations, supplemental memoranda, or other communications.
2. Failure to fulfill duties or responsibilities.
3. Incompetency or inefficiency in the performance of duties.
4. Insubordination or failure to comply with Board directives.
5. Failure to comply with Board policies or administrative regulations.
6. Failure of the District to make measurable progress toward the goals stated in the District improvement plan. [See BQ]
7. Conducting personal business during school hours when it results in neglect of duties.
8. Drunkenness or excessive use of alcoholic beverages; or possession, use, or being under the influence of alcohol or alcoholic beverages while on District property, while working in the scope of the employee's duties, or while attending any school- or District-sponsored activity.
9. The illegal possession, use, manufacture, or distribution of a controlled substance, a drug, a dangerous drug, hallucinogens, or other substances regulated by state statutes.
10. Failure to meet the District's standards of professional conduct.
11. Failure to report to the Board any arrest, indictment, conviction, no contest or guilty plea, or other adjudication for any felony, any crime involving moral turpitude, or other offense listed at DH(LOCAL). [See DH]
12. Conviction of or deferred adjudication for any felony, any crime involving moral turpitude, or other offense listed at DH(LOCAL); or conviction of a lesser included offense pursuant to a plea when the original charged offense is a felony. [See DH]
13. Failure to comply with reasonable District requirements regarding advanced coursework or professional improvement and growth.

14. Disability, not otherwise protected by law, that prevents the Superintendent from performing the essential functions of the job, with or without reasonable accommodation.

15. Any activity, school-connected or otherwise, that, because of publicity given it or knowledge of it among students, faculty, or the community, impairs or diminishes the Superintendent's effectiveness in the District.

16. Any breach by the Superintendent of an employment contract or any reason specified in the Superintendent's employment contract.

17. Failure to maintain an effective working relationship, or maintain good rapport, with parents, the community, staff, or the Board.

18. Behavior that presents a danger of physical harm to a student or other individuals.

19. Assault on a person on District property or at a school-related function, or on an employee, student, or student's parent regardless of time or place.

20. Use of profanity in the course of performing any duties of employment, whether on or off District premises, in the presence of students, staff, or members of the public, if reasonably characterized as unprofessional.

21. Falsification of records or other documents related to the District's activities.

22. Falsification or omission of required information on an employment application.

23. Misrepresentation of facts to the Board or other District officials in the conduct of District business.

24. Failure to fulfill or maintain requirements for Superintendent certification, unless granted a waiver by the commissioner of education.

25. Any attempt to encourage or coerce a child to withhold information from the child's parent or from other District personnel.

26. Any reason that makes the employment relationship void or voidable, such as a violation of federal, state, or local law.

27. Engaging in or assigning to another individual, whether intentionally or knowingly, an instruction, guidance, activities, or programming prohibited by law. [See EMB]

28. Engaging in or assigning to another individual, whether intentionally or knowingly, diversity, equity, and inclusion duties prohibited by law.

29. Any reason constituting good cause for terminating the contract during its term.

Notice of Proposed Nonrenewal

If the Board determines that the Superintendent's contract should be considered for nonrenewal, the Board shall deliver to the Superintendent written notice of the proposed nonrenewal in accordance with law.

Request for Hearing

If the Superintendent desires a hearing after receiving notice of the proposed nonrenewal, the Superintendent shall notify the Board in writing not later than the 15th day after receiving the notice. When the Board receives a timely request for a hearing on proposed nonrenewal, the hearing shall be held not later than the 15th day after receipt of the request, unless the parties mutually agree to a delay. The Superintendent shall be given notice of the hearing date as soon as it is set.

Hearing Procedure

Unless the Superintendent requests that the hearing be open, the hearing shall be conducted in closed meeting with only the members of the Board, the Superintendent, their chosen representatives, and such witnesses as may be called in attendance. Witnesses may be excluded from the hearing until called to present evidence. The Superintendent and the Board may each be represented by a person designated in writing to act for them. Notice, at least five days in advance of the hearing, shall be given by each party intending to be represented, including the name of the representative. Failure to give such notice may result in postponement of the hearing.

The conduct of the hearing shall be under the presiding officer's control and shall generally follow the steps listed below:

1. After consultation with the parties, the presiding officer shall impose reasonable time limits for presentation of evidence and closing arguments.

2. The hearing shall begin with the Board's presentation, supported by such proof as it desires to offer.

3. The Superintendent may cross-examine any witnesses for the Board.

4. The Superintendent may then present such testimonial or documentary proofs, as desired, to offer in rebuttal or in general support of the contention that the contract be renewed.

5. The Board may cross-examine any witnesses for the Superintendent and offer rebuttal to the testimony of the Superintendent's witnesses.

6. Closing arguments may be made by each party.

A record of the hearing shall be made so that a certified transcript can be prepared, if required.

Board Decision

The Board may consider only such evidence as is presented at the hearing. After all the evidence has been presented, if the Board determines that the reasons given in support of the recommendation to not renew the Superintendent's contract are lawful, supported by the evidence, and not arbitrary or capricious, it shall so notify the Superintendent by a written notice not later than the 15th day after the date on which the hearing is concluded. This notice shall also include the Board's decision on renewal, which decision shall be final.

No Hearing

If the Superintendent fails to request a hearing, the Board shall take the appropriate action and notify the Superintendent in writing of that action not later than the 30th day after the date the notice of proposed nonrenewal was sent.

Definitions

"Diversity, equity, and inclusion duties" means:

1. Influencing hiring or employment practices with respect to race, sex, color, or ethnicity except as necessary to comply with state or federal antidiscrimination laws;
2. Promoting differential treatment of or providing special benefits to individuals on the basis of race, color, or ethnicity;
3. Developing or implementing policies, procedures, trainings, activities, or programs that reference race, color, ethnicity, gender identity, or sexual orientation, except for the purpose of student recruitment efforts by colleges and universities designated as historically black colleges and universities in collaboration with school districts, or as necessary to comply with state or federal law;
4. Compelling, requiring, inducing, or soliciting any person to provide a diversity, equity, and inclusion statement or giving preferential consideration to any person based on the provision of a diversity, equity, and inclusion statement.

Education Code 11.005(a)

Prohibited Activities

Except as required by state or federal law, a district may not assign diversity, equity, and inclusion duties to any person and must prohibit a district employee, contractor, or volunteer from engaging in diversity, equity, and inclusion duties at, for, or on behalf on the district.

Discipline Policy

The district shall adopt a policy and procedure for the appropriate discipline, including termination, of a district employee or contractor who intentionally or knowingly engages in or assigns to another person diversity, equity, and inclusion duties. The policy and procedure adopted by the district must ensure that an employee or contractor receives adequate due process and an opportunity to appeal disciplinary actions, including termination, in the same manner provided for other disciplinary actions.

Notice

The district shall provide a physical and electronic copy of the policy and procedure to each district employee or contractor.

Education Code 11.005(b)-(d)

Activities Not Prohibited

Nothing in this policy may be construed to:

1. Limit or prohibit a district from contracting with historically underutilized businesses or businesses owned by members of a minority group or by women in accordance with applicable state law;

2. Limit or prohibit a district from acknowledging or teaching the significance of state and federal holidays or commemorative months and how those holidays or months fit into the themes of history and the stories of this state and the United States of America in accordance with the TEKS adopted under Education Code, Subchapter A, Chapter 28;

3. Affect a student's rights under the First Amendment to the U.S. Constitution or Section 8, Article I, Texas Constitution;

4. Limit or prohibit a school district from analyzing school-based causes and taking steps to eliminate unlawful discriminatory practices as necessary to address achievement gaps and differentials described by Education Code 39.053; or

5. Apply to:

   a. Classroom instruction that is consistent with the TEKS adopted by the State Board of Education;

   b. The collection, monitoring, or reporting of data;

   c. A policy, practice, procedure, program, or activity intended to enhance student academic achievement or postgraduate outcomes that is designed and implemented without regard to race, sex, color, or ethnicity; or

   d. A student club that is in compliance with the requirements of Education Code 33.0815.

Education Code 11.005(e)

Certification Required

Not later than September 30 of each year, the superintendent of a school district shall certify to the Texas Education Agency (TEA) that the district is in compliance with Education Code 11.005 (prohibition on diversity, equity, and inclusion duties) and the instructional requirements and prohibitions under Education Code 28.0022 [see EMB]. The certification shall be submitted electronically. TEA shall post each certification received under Education Code 39.008(a) on TEA's website.

Requirements

The certification must include:

1. A description of the policies and procedures required by Education Code 11.005(c) and 28.0022(h) and the manner in which district employees and contractors were notified of those policies and procedures;

2. Any existing policies, programs, procedures, or trainings that were altered to ensure compliance with Education Code 39.008, 11.005, or 28.0022; and

3. Any cost savings resulting from actions taken by the school district to comply with this section.

Board Approval

The certification required by Education Code 39.008(a) must be approved by a majority vote of the board at a public meeting that includes an opportunity for public testimony and for which notice was posted on the district's website at least seven days before the date on which the meeting is held.

Education Code 39.008

Employment Assistance Prohibited

A district that receives Title I funds shall have regulations or policies that prohibit any individual who is a school employee, contractor, or agent, or a district, from assisting a school contractor or agent in obtaining a new job, apart from the routine transmission of administrative and personnel files, if the individual or district knows, or has probable cause to believe, that such contractor or agent engaged in sexual misconduct regarding a minor or student in violation of the law.

This requirement shall not apply if the information giving rise to probable cause has been properly reported to a law enforcement agency with jurisdiction over the alleged misconduct; and has been properly reported to any other authorities as required by federal, state, or local law, including Title IX of the Education Amendments of 1972 (20 U.S.C. 1681 et seq.) and the implementing regulations under Part 106 of Title 34, Code of Federal Regulations, or any succeeding regulations; and:

1. The matter has been officially closed or the prosecutor or police with jurisdiction over the alleged misconduct has investigated the allegations and notified school officials that there is insufficient information to establish probable cause that the contractor or agent engaged in sexual misconduct regarding a minor or student in violation of the law;
2. The contractor or agent has been charged with and acquitted or otherwise exonerated of the alleged misconduct; or
3. The case or investigation remains open and there have been no charges filed against, or indictment of, the contractor or agent within four years of the date on which the information was reported to a law enforcement agency.

20 U.S.C. 7926 [See also DC]

Severance Pay

A district that enters into a contract or employment agreement, or renewal or renegotiation of an existing contract or employment agreement, that contains a provision for severance pay with an independent contractor must include:

1. A requirement that severance pay that is paid from public money may not exceed the amount of compensation, at the rate at the termination of the contract, the independent contractor would have been paid for 20 weeks, excluding paid time off or accrued vacation leave; and
2. A prohibition of the provision of severance pay when the independent contractor is terminated for misconduct.

A district shall post each severance agreement in a prominent place on its internet website.

"Misconduct" means an act or omission by a contractor in the performance of the contractor's duties that the board determines to be misconduct, including any finding of criminal conduct.

"Severance pay" means dismissal or separation income paid on termination of the contract of an independent contractor that is in addition to the contractor's usual compensation as prescribed by the contract.

[For provisions related to severance agreements for district employees, see DEA.]

Local Gov't Code 180.011

Prohibition on Diversity, Equity, and Inclusion

A district shall adopt a policy and procedure for the appropriate discipline, including termination, of a district contractor who intentionally or knowingly engages in or assigns to another person diversity, equity, and inclusion duties. The district shall provide a physical and electronic copy of the policy and procedure to each district contractor.

The policy and procedure adopted by a district must ensure that a contractor receives adequate due process and an opportunity to appeal disciplinary actions, including termination, in the same manner provided for other disciplinary actions. [See BT|

Education Code 11.005(c)-(d) [See also DF]

Prohibited Classroom Instruction

A district shall adopt a policy and procedure for the appropriate discipline, including termination, of a district or school contractor who intentionally or knowingly engages in or assigns to another person an act prohibited by Education Code 28.0022 (Certain Instructional Requirements and Prohibitions). The district shall provide a physical and electronic copy of the policy and procedure to each district or school contractor. *Education Code 28.0022(h)* [See also DF, EMD]

Sexual Orientation and Gender Identity

A district or district employee may not allow a third party to provide instruction, guidance, activities, or programming regarding sexual orientation and gender identity to students enrolled in prekindergarten through 12th grade.

This provision may not be construed to:

1. Limit a student's ability to engage in speech or expressive conduct protected by the First Amendment, U.S. Constitution or by Section 8, Article I, Texas Constitution, that does not result in material disruption to school activities;

2. Limit the ability of a person who is authorized by the district to provide physical or mental health-related services to provide the services to a student, subject to any required parental consent; or

3. Prohibit an organization whose membership is restricted to one sex and whose mission does not advance a political or social agenda from meeting on a district campus.

Education Code 28.0043 [See also EMB]

Employment Assistance Prohibited

No District employee shall assist a contractor or agent of the District or of any other school district in obtaining a new job if the employee knows, or has probable cause to believe, that the contractor or agent engaged in sexual misconduct regarding a minor or student in violation of the law. Routine transmission of an administrative file does not violate this prohibition.

No District contractor or agent shall assist an employee, contractor, or agent of the District or of any other school district in obtaining a new job if the contractor or agent knows, or has probable cause to believe, that the individual engaged in sexual misconduct regarding a minor or student in violation of the law. Routine transmission of an administrative or personnel file does not violate this prohibition.

[See also DC for prohibitions relating to employees.]

Prohibited Classroom Instruction or Activities

A District contractor is prohibited from intentionally or knowingly engaging in or assigning to another individual instruction, guidance, activities, or programming prohibited by law [see EMB(LEGAL)]. Violation of this policy shall result in termination of the contract. A District contractor shall be permitted to appeal this action in accordance with GF(LOCAL).

Prohibition on Diversity, Equity, and Inclusion

A contract is subject to termination if the District contractor intentionally or knowingly:

- Engages in diversity, equity, and inclusion (DEI) duties.
- Assigns to another individual DEI duties.

A District contractor shall be permitted to appeal this action in accordance with GF(LOCAL).

[See BT(LEGAL)]

Note: For a detailed treatment of termination and nonrenewal of educator contracts, see policies DFAA and DFAB (Probationary Contracts), and DFBA and DFBB (Term Contracts).

Withholding Information

An attempt by any district employee to encourage or coerce a child to withhold information from the child's parent is grounds for discharge or suspension under Education Code 21.104 (probationary contracts) and 21.211 (term contracts) or by the State Board for Educator Certification (SBEC), if applicable. *Education Code 26.008(b)*

Registry of Persons Not Eligible for Employment

A district shall discharge, or refuse to hire, or terminate, a person listed on TEA's registry of persons who are not eligible to be employed. [See DBAA] *Education Code 22A.151(b)*

Discharge of Convicted Employees

A district shall discharge or refuse to hire an employee or applicant for employment if the district obtains information through a criminal history record information (CHRI) review that the employee or applicant has been:

1. Convicted of or placed on deferred adjudication community supervision for:
    a. An offense requiring registration as a sex offender under Code of Criminal Procedure Chapter 62;
    b. An offense under Penal Code 21.12, Improper Relationship Between an Educator and a Student, or Penal Code 43.24, Sale, Distribution, or Display of Harmful Material to a Minor;
    c. A felony offense under Penal Code Chapter 43, Public Indecency;
    d. A felony offense involving school property; or
    e. An offense under the laws of another state or federal law that is equivalent to items a, b, c, or d; or
2. Convicted of:
    a. A felony under Title 5, Penal Code; or
    b. An offense under the laws of another state or federal law that is equivalent to an offense under item 2a, above.

Exception

However, a district is not required to discharge an employee if the person committed an offense under Title 5, Penal Code, and:

1. The date of the offense is more than 30 years before the date the person's employment will begin; and

2. The employee satisfied all terms of the court order entered on conviction.

Education Code 22A.157(a)-(b), 22A.201(a) [See DBAA]

Certification to Commissioner

Each school year, a superintendent shall certify to the commissioner that the district has complied with the above provisions. *Education Code 22A.157(f)*

Sanctions

SBEC may impose a sanction on an educator who does not discharge an employee if the educator knows or should have known, through a criminal history record information review, that the employee has criminal history described in Discharge of Convicted Employees, above. *Education Code 22A.157(e)*

Termination for Failure to Disclose

A district may discharge an employee if the district obtains information of the employee's conviction of a felony or of a misdemeanor involving moral turpitude that the employee did not disclose to SBEC or the district. An employee so discharged is considered to have been discharged for misconduct for purposes of Labor Code 207.044 (unemployment compensation). *Education Code 22A.157(d)*

Certain Offenses Against Students

Mandatory Termination

If a district receives notice that SBEC has revoked the certificate of a person based on the offenses listed at Discharge of Convicted Employees, the district shall:

1. Immediately remove the person whose certificate has been revoked from campus or from an administrative office, as applicable, to prevent the person from having any contact with a student; and

2. For a person employed under a Chapter 21 probationary or term contract, with the approval of the board or its designee:

    a. Suspend the person without pay;

    b. Provide the person with written notice that the person's contract is void [see Notice to Employee, below]; and

    c. Terminate the employment of the person as soon as practicable.

Education Code 22A.201(a), (c)

Discretionary Termination

If a district becomes aware that a person employed by the district under a probationary or term contract under Chapter 21 has been convicted of or received deferred adjudication for a felony offense, and the person is not subject to the mandatory termination provi-

sion above, the district may, with the approval of the board or its designee:

1. Suspend the person without pay;
2. Provide the person with written notice that the person's contract is void [see Notice to Employee, below]; and
3. Terminate the employment of the person as soon as practicable.

Education Code 22A.201(d)

Notice to Employee

A person's probationary or term contract under Chapter 21 is void if, with the approval of the board or its designee, the district provides written notice to the person, under the mandatory or discretionary termination provisions above, that the person's contract is void. *Education Code 22A.201(e)*

No Appeal

Action taken by a district under the mandatory or discretionary terminations provisions above is not subject to appeal under Education Code Chapter 21 and the notice and hearing requirements of Chapter 21 do not apply to the action. *Education Code 22A.201(g)*

Invalid or Expired Certification

An employee's probationary or term contract is void if the employee:

1. Does not hold a valid certificate or permit issued by SBEC;
2. Fails to fulfill the requirements necessary to renew or extend the employee's temporary, probationary, or emergency certificate or any other certificate or permit issued under Education Code Chapter 21, Subchapter B; or
3. Fails to comply with any requirement under Education Code Chapter 22, Subchapter C [criminal history review, see DBAA], if the failure results in suspension or revocation of the employee's certificate.

Education Code 21.0031(a)

A certificate or permit is not considered to have expired if:

1. The employee has completed the requirements for renewal of the certificate or permit;
2. The employee submitted the request for renewal before the expiration date; and

3. The date the certificate or permit would have expired is before the date SBEC takes action to approve the renewal of the certificate or permit.

Education Code 21.0031(f)

District's Options

If a district has knowledge that an employee's contract is void under Education Code 21.0031(a), the district may:

1. Terminate the employee;
2. Suspend the employee with or without pay; or
3. Retain the employee for the remainder of the school year on an at-will employment basis in a position that does not require a contract under Education Code 21.002, at the employee's existing rate of pay or at a reduced rate.

The employee is not entitled to the minimum salary prescribed by Education Code 21.402.

Education Code 21.0031(b)

Exception

A district may not terminate or suspend an employee under 21.0031(b) because of the employee's lack of a valid certificate or permit, or failure to renew or extend a certificate or permit, if:

1. The employee requests an extension from SBEC to renew, extend, or otherwise validate the employee's certificate or permit; and
2. Not later than the 10th day after the date the contract is void, the employee takes necessary measures to renew, extend, or otherwise validate the employee's certificate or permit, as determined by SBEC.

Education Code 21.0031(b-1)

No Appeal or Chapter 21 Hearing

A school district's decision under Education Code 21.0031(b) is not subject to appeal under Education Code Chapter 21, and the notice and hearing requirements of that chapter do not apply to the decision. *Education Code 21.0031*

Applicability

These void contract provisions do not affect the rights and remedies of a party in an at-will employment relationship and do not apply to a certified teacher assigned to teach a subject for which the teacher is not certified. *Education Code 21.0031; Nunez v. Simms, 341 F.3d 385 (5th Cir. 2003)*

Report to SBEC

A superintendent shall report the educator's termination to SBEC if the conditions set forth at Education Code 22A.051 exist. [See DHB]

Report to Superintendent

A principal shall report the educator's termination to the superintendent if the conditions set forth at Education Code 22A.051 exist. [See DPA]

Falsification of Military Record

A district may discharge an employee, regardless of whether the employee is employed under an employment contract, if the district determines, based on a reasonable factual basis, that the employee, in obtaining the employee's employment or any benefit relating to the employee's employment, falsified or otherwise misrepresented any information regarding the employee's military record in a manner that would constitute an offense under Penal Code 32.54.

An employment contract entered into by a district with an employee discharged by the employer under Labor Code Chapter 105 is void and unenforceable as against public policy. [See DF series]

Labor Code Ch. 105

Prohibition on Diversity, Equity, and Inclusion

A district shall adopt a policy and procedure for the appropriate discipline, including termination, of a district employee or contractor who intentionally or knowingly engages in or assigns to another person diversity, equity, and inclusion duties. The district shall provide a physical and electronic copy of the policy and procedure to each district employee or contractor.

The policy and procedure adopted by a district must ensure that an employee or contractor receives adequate due process and an opportunity to appeal disciplinary actions, including termination, in the same manner provided for other disciplinary actions. [See BT]

Education Code 11.005(c)-(d)

Prohibited Classroom Instruction

A district shall adopt a policy and procedure for the appropriate discipline, including termination, of a district or school employee or contractor who intentionally or knowingly engages in or assigns to another person an act prohibited by Education Code 28.0022 (Certain Instructional Requirements and Prohibitions). The district shall provide a physical and electronic copy of the policy and procedure to each district or school employee or contractor. [See EMB] *Education Code 28.0022(h)*

Reasons

The recommendation to the Board and its decision not to renew a contract under this policy shall not be based on an employee's exercise of Constitutional rights or based unlawfully on an employee's race, color, religion, sex, gender, national origin, age, disability, or any other basis prohibited by law. Reasons for proposed nonrenewal of an employee's term contract shall be:

1. Deficiencies pointed out in observation reports, appraisals or evaluations, supplemental memoranda, or other communications.
2. Failure to fulfill duties or responsibilities.
3. Incompetency or inefficiency in the performance of duties.
4. Inability to maintain discipline in any situation in which the employee is responsible for the oversight and supervision of students.
5. Insubordination or failure to comply with official directives.
6. Failure to comply with Board policies or administrative regulations.
7. Excessive absences.
8. Conducting personal business during school hours when it results in neglect of duties.
9. Reduction in force because of financial exigency. [See DFFA]
10. Reduction in force because of a program change. [See DFFB]
11. The employee is not retained at a campus in accordance with the provisions of a campus turnaround plan. [See AIC]
12. Drunkenness or excessive use of alcoholic beverages; or possession, use, or being under the influence of alcohol or alcoholic beverages while on District property, while working in the scope of the employee's duties, or while attending any school- or District-sponsored activity.
13. The illegal possession, use, manufacture, or distribution of a controlled substance, a drug, a dangerous drug, hallucinogens, or other substances regulated by state statutes.
14. Failure to meet the District's standards of professional conduct.
15. Failure to report any arrest, indictment, conviction, no contest or guilty plea, or other adjudication for any felony, any crime

involving moral turpitude, or other offense listed at DH(LOCAL). [See DH]

16. Conviction of or deferred adjudication for any felony, any crime involving moral turpitude, or other offense listed at DH(LOCAL); or conviction of a lesser included offense pursuant to a plea when the original charged offense is a felony. [See DH]
17. Failure to comply with reasonable District requirements regarding advanced coursework or professional improvement and growth.
18. Disability, not otherwise protected by law, that prevents the employee from performing the essential functions of the job, with or without reasonable accommodation.
19. Any activity, school-connected or otherwise, that, because of publicity given it, or knowledge of it among students, faculty, or the community, impairs or diminishes the employee's effectiveness in the District.
20. Any breach by the employee of an employment contract or any reason specified in the employee's employment contract.
21. Failure to maintain an effective working relationship, or maintain good rapport, with parents, the community, or colleagues.
22. A significant lack of student progress attributable to the educator.
23. Behavior that presents a danger of physical harm to a student or to other individuals.
24. Assault on a person on District property or at a school-related function, or on an employee, student, or student's parent regardless of time or place.
25. Use of profanity in the course of performing any duties of employment, whether on or off school premises, in the presence of students, staff, or members of the public, if reasonably characterized as unprofessional.
26. Falsification of records or other documents related to the District's activities.
27. Falsification or omission of required information on an employment application.
28. Misrepresentation of facts to a supervisor or other District official in the conduct of District business.

29. Failure to fulfill requirements for state licensure or certification, including passing certification or licensing examinations required by state or federal law or by the District, for the employee's assignment.

30. Failure to maintain licensing and certification requirements, including the completion of required continuing education hours, for the employee's assignment.

31. Failure to complete certification or permit renewal requirements, or failure to fulfill the requirements of a deficiency plan, under an Emergency Permit or a Temporary Classroom Assignment Permit.

32. Any attempt to encourage or coerce a child to withhold information from the child's parent or from other District personnel.

33. Any reason that makes the employment relationship void or voidable, such as a violation of federal, state, or local law.

34. Engaging in or assigning to another individual, whether intentionally or knowingly, an instruction, guidance, activities, or programming prohibited by law. [See EMB]

35. Engaging in or assigning to another individual, whether intentionally or knowingly, diversity, equity, and inclusion duties prohibited by law.

36. Any reason constituting good cause for terminating the contract during its term.

Recommendations from Administration

Administrative recommendations for renewal or proposed nonrenewal of term contracts shall be submitted to the Superintendent. A recommendation for proposed nonrenewal shall be supported by any relevant documentation. The final decision on the administrative recommendation to the Board on each employee's contract rests with the Superintendent.

Superintendent's Recommendation

The Superintendent shall prepare lists of employees whose contracts are recommended for renewal or proposed nonrenewal by the Board. Supporting documentation, if any, and reasons for the recommendation shall be submitted for each employee recommended for proposed nonrenewal.

The Board shall consider such information, as appropriate, in support of recommendations for proposed nonrenewal and shall then act on all recommendations.

Notice of Proposed Nonrenewal

After the Board votes to propose nonrenewal, the Superintendent or designee shall deliver written notice of proposed nonrenewal in accordance with law.

If the notice of proposed nonrenewal does not contain a statement of the reason or all the reasons for the proposed action, and the employee requests a hearing, the District shall give the employee notice of all reasons for the proposed nonrenewal at a reasonable time before the hearing. The initial notice or any subsequent notice shall contain the hearing procedures.

Request for Hearing

If the employee desires a hearing after receiving the notice of proposed nonrenewal, the employee shall notify the Board in writing not later than the 15th day after the date the employee received the notice of proposed nonrenewal.

When a timely request for a hearing on a proposed nonrenewal is received by the presiding officer, the Board shall notify the employee whether the hearing will be conducted by the Board [see Hearing by the Board, below] or an attorney designated by the Board [see Hearing by an Attorney Designated by the Board, below].

In either case, the hearing shall be held not later than the 15th day after receipt of the request, unless the parties mutually agree to a delay. The employee shall be given notice of the hearing date as soon as it is set.

Hearing by the Board

Unless the employee requests that the hearing be open, the hearing shall be conducted in closed meeting with only the members of the Board, the employee, the Superintendent, their representatives, and such witnesses as may be called in attendance. Witnesses may be excluded from the hearing until called to present evidence. The employee and the administration may choose a representative. Notice, at least five days in advance of the hearing, shall be given by each party intending to be represented, including the name of the representative. Failure to give such notice may result in postponement of the hearing.

Hearing Procedures

The conduct of the hearing shall be under the presiding officer's control and shall generally follow the steps listed below:

1. After consultation with the parties, the presiding officer shall impose reasonable time limits for presentation of evidence and closing arguments.
2. The hearing shall begin with the administration's presentation, supported by such proof as it desires to offer.
3. The employee may cross-examine any witnesses for the administration.

4. The employee may then present such testimonial or documentary proof, as desired, to offer in rebuttal or general support of the contention that the contract be renewed.

5. The administration may cross-examine any witnesses for the employee and offer rebuttal to the testimony of the employee's witnesses.

6. Closing arguments may be made by each party.

A record of the hearing shall be made so that a certified transcript can be prepared, if required.

Board Decision

The Board may consider only evidence presented at the hearing. After all the evidence has been presented, if the Board determines that the reasons given in support of the recommendation to not renew the employee's contract are lawful, supported by the evidence, and not arbitrary or capricious, it shall so notify the employee by a written notice not later than the 15th day after the date on which the hearing is concluded. This notice shall also include the Board's decision on renewal, which decision shall be final.

Hearing by an Attorney Designated by the Board

The hearing must be private unless the employee requests in writing that the hearing be public, except that the attorney may close the hearing to maintain decorum. If the employee does not request a public hearing, only the attorney designated by the Board, the employee, the Superintendent, their representatives, and witnesses shall be permitted to be in attendance, and witnesses may be excluded from the hearing until called to present evidence. The employee and the administration may choose a representative. Notice, at least five days in advance of the hearing, shall be given by each party intending to be represented, including the name of the representative. Failure to give such notice may result in postponement of the hearing.

The conduct of the hearing shall be under the control of the attorney designated by the Board and shall generally follow the steps listed at Hearing by the Board.

Not later than the 15th day after the completion of the hearing, the attorney shall provide to the Board a record of the hearing and his or her recommendation on renewal.

Board Review

The Board shall consider the record of the hearing and the attorney's recommendation at the first Board meeting for which notice can be posted, unless the parties agree in writing to a different date. The Board shall notify the employee of the meeting date as soon as it is set. At the meeting, the Board shall allow each party an equal amount of time to present oral arguments. The Board

shall notify the employee in writing of the Board's decision on renewal not later than the 15th day after the date of the meeting.

No Hearing

If the employee fails to request a hearing, the Board shall take the appropriate action and notify the employee in writing of that action not later than the 30th day after the date the notice of proposed nonrenewal was sent.

Note: For the Educators' Code of Ethics, see DHA(LEGAL).

Duty to Report

Report by Any Person

Any person who has reasonable cause to believe that a child's physical or mental health or welfare has been adversely affected by abuse or neglect by any person shall immediately make a report as required by law. *Family Code 261.101(a)*

Report by Any Professional

Any professional who has reasonable cause to believe that a child has been or may be abused or neglected shall make a report as required by law. The report must be made within 24 hours after the professional first has reasonable cause to believe that the child has been or may be abused or neglected or is the victim of an offense of indecency with a child.

A professional may not delegate to or rely on another person to make the report.

A "professional" is a person who is licensed or certified by the state or who is an employee of a facility licensed, certified, or operated by the state and who, in the normal course of official duties or duties for which a license or certification is required, has direct contact with children. The term includes teachers, nurses, doctors, day-care employees, juvenile probation officers, and juvenile detention or correctional officers.

Family Code 261.101(b) [See FFG]

Public Servants

All district employees are "public servants" and therefore subject to Title VIII of the Penal Code, regarding offenses against public administration, including restrictions on the acceptance of illegal gifts, honoraria and expenses, and abuse of office. *Penal Code 1.07(a)(41), Title VIII* [See DBD and BBFA]

Electronic Communication Policy

"Electronic communication" means any communication facilitated by the use of any electronic device, including a telephone, cellular telephone, computer, computer network, personal data assistant, or pager. The term includes emails, text messages, instant messages, and any communications made through a website, including a social media website or a social networking website.

A school district shall adopt a written policy concerning electronic communications between a school employee and a student enrolled in the district.

The policy adopted under this section must:

1. Include provisions designed to prevent improper electronic communications between a school employee and a student;

2. Allow a school employee to elect to not disclose to students the employee's personal telephone number or email address; and

3. Include provisions instructing a school employee about the proper method for notifying appropriate local administrators about an incident in which a student engages in improper communications with the school employee.

Education Code 38.027

Retaliation Against Grievant

The district grievance policy prohibits a district employee from retaliating against a student or parent of or person standing in parental relation to a student who files a grievance in accordance with the district grievance policy. If the commissioner determines that an educator has retaliated against a student or parent of or person standing in parental relation to a student who files a grievance under the district's grievance policy, the commissioner may report the educator to SBEC for investigation. *Education Code 26A.001(e)(1), (i)* [See DGBA]

Social Transitioning

The board shall adopt a policy prohibiting an employee of the district from assisting a student enrolled in the district with social transitioning, including by providing any information about social transitioning or providing guidelines intended to assist a person with social transitioning.

"Social transitioning" means a person's transition from the person's biological sex at birth to the opposite biological sex through the adoption of a different name, different pronouns, or other expressions of gender that deny or encourage a denial of the person's biological sex at birth.

A parent of a student enrolled in the district or a district employee may report to the board of trustees of the district a suspected violation of this policy. The board shall investigate any suspected violation and determine whether the violation occurred. If the board determines that a district employee has assisted a student enrolled at the district with social transitioning, the board shall immediately report the violation to the commissioner.

A parent of a student enrolled in a district may seek relief for a violation by filing a grievance through the district's grievance procedure.

Education Code 11.401-.402

Public Information on Private Device

A current or former board member or employee of a district who maintains public information on a privately owned device shall:

1. Forward or transfer the public information to the district or a district server to be preserved as provided by Government Code 552.004(a); or

2. Preserve the public information in its original form in a backup or archive and on the privately owned device for the time described under 552.004(a).

Gov't Code 552.004(b) [See GB]

Loss of Retirement Annuity for Conviction of Certain Felonies

A person is not eligible to receive a service retirement annuity from the Teacher Retirement System (TRS) if the person is convicted of a qualifying felony and the victim is a student.

"Qualifying felony" means an offense that is punishable as a felony under the following sections of the Penal Code:

1. Section 21.02 (continuous sexual abuse of young child or disabled individual);

2. Section 21.12 (improper relationship between educator and student);

3. Section 22.011 (sexual assault) or Section 22.021 (aggravated sexual assault); or

4. Section 43.24 (sale, distribution, or display of harmful material to minor).

The term includes any federal offense that contains elements that are substantially similar to the elements of a felony offense described above.

Not later than the 30th day after the date of a person's conviction for a qualifying felony, the school at which the person was employed shall provide written notice of the conviction to TRS. The notice must comply with rules adopted by TRS.

Gov't Code 824.009

Transportation or Storage of Firearm in School Parking Area

A district may not prohibit a school employee who holds a license to carry a handgun under Government Code, Chapter 411, Subchapter H, from transporting or storing a handgun or other firearm or ammunition in a locked, privately owned or leased motor vehicle in a parking lot, parking garage, or other parking area provided by the district and may not regulate the manner in which the handgun, firearm, or ammunition is stored in the vehicle, provided that the handgun, firearm, or ammunition is not in plain view.

This does not authorize a person to possess, transport, or store a handgun, a firearm, or ammunition in violation of Education Code 37.125, Penal Code 46.03, or other law. [See GKA]

Education Code 37.0815

Tobacco and E-Cigarettes

A board shall prohibit smoking or using e-cigarettes or tobacco products at a school-related or school-sanctioned activity on or off school property.

Enforcement

A board shall ensure that district personnel enforce the policies on school property.

Education Code 38.006(b) [See also FNCD and GKA]

Drug and Alcohol Abuse Program

A board shall prohibit the use of alcoholic beverages at school-related or school-sanctioned activities on or off school property. *Education Code 38.007(a)*

Federal Drug-Free Workplace Act

A district that receives a direct federal grant must agree to provide a drug-free workplace by:

1. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance is prohibited in the district's workplace and specifying the actions that will be taken against employees for violations of the prohibition;
2. Establishing a drug-free awareness program to inform employees about:
    a. The dangers of drug abuse in the workplace;
    b. The district's policy of maintaining a drug-free workplace;
    c. Available drug counseling, rehabilitation, and employee assistance programs; and
    d. The penalties that may be imposed on employees for drug abuse violations;
3. Making it a requirement that each employee to be engaged in the performance of the grant be given a copy of the required statement;
4. Notifying the employee in the required statement that as a condition of employment in the grant the employee will:
    a. Abide by the terms of the statement; and
    b. Notify the district of any criminal drug statute conviction for a violation occurring in the workplace no later than 5 days after the conviction;

5. Notifying the granting agency within 10 days after receiving notice from an employee or otherwise receiving actual notice of a conviction;

6. Imposing a sanction on, or requiring the satisfactory participation in a drug abuse assistance or rehabilitation program by, any employee who is convicted, as required by 41 U.S.C. section 8104; and

7. Making a good faith effort to continue to maintain a drug-free workplace through implementation of the above requirements.

41 U.S.C. 8103(a)(1)

Dietary Supplements

Except as provided at Education Code 38.011(b), a district employee may not:

1. Knowingly sell, market, or distribute a dietary supplement that contains performance-enhancing compounds to a primary or secondary education student with whom the employee has contact as part of the employee's duties; or

2. Knowingly endorse or suggest the ingestion, intranasal application, or inhalation of a dietary supplement that contains performance-enhancing compounds by a primary or secondary student with whom the employee has contact as part of the employee's duties.

An employee who violates items 1 or 2, above, commits a Class C misdemeanor offense.

Education Code 38.011

Low-THC Cannabis

A district may not enact, adopt, or enforce a rule, ordinance, order, resolution, or other regulation that prohibits the storage or possession of low-THC cannabis, as authorized by Health and Safety Code Chapter 487. *Health and Safety Code 487.201*

Each District employee shall perform his or her duties in accordance with state and federal law, District policy, and ethical standards. The District holds all employees accountable to the Educators' Code of Ethics. [See DHA(LEGAL)]

Each District employee shall recognize and respect the rights of students, parents, other employees, and members of the community and shall work cooperatively with others to serve the best interests of the District.

An employee wishing to express concern, complaints, or criticism shall do so through appropriate channels. [See DGBA]

Violations of Standards of Conduct

Each employee shall comply with the standards of conduct set out in this policy and with any other policies, regulations, and guidelines that impose duties, requirements, or standards attendant to his or her status as a District employee. Violation of any policies, regulations, or guidelines, including intentionally making a false claim, offering a false statement, or refusing to cooperate with a District investigation, may result in disciplinary action, including termination of employment. [See DCD, DCE, and DF series]

Weapons Prohibited

The District prohibits the use, possession, or display of any firearm, location-restricted knife, club, or prohibited weapon, as defined at FNCG, on District property at all times.

Exceptions

No violation of this policy occurs when:

1. Use or possession of a firearm by a specific employee is authorized by Board action [see the CKE series];
2. A District employee who holds a handgun license in accordance with state law stores a handgun or other firearm in a locked vehicle in a parking lot, parking garage, or other parking area provided by the District, provided the handgun or other firearm is not in plain view; or
3. The use, possession, or display of an otherwise prohibited weapon takes place as part of a District-approved activity supervised by proper authorities. [See FOD]

Electronic Communication

Use with Students

A certified employee, licensed employee, or any other employee designated in writing by the Superintendent or a campus principal may use electronic communication, as this term is defined by law, with currently enrolled students only about matters within the scope of the employee's professional responsibilities.

Unless an exception has been made in accordance with the employee handbook or other administrative regulations, an employee

shall not use a personal electronic communication platform, application, or account to communicate with currently enrolled students.

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

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

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

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

Personal Use

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

Reporting Improper Communication

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

Disclosing Personal Information

An employee shall not be required to disclose his or her personal email address or personal phone number to a student.

Prohibited Classroom Instruction or Activities

An employee is prohibited from intentionally or knowingly engaging in or assigning to another individual instruction, guidance, activities, or programming prohibited by law [see EMB].

Prohibited Diversity, Equity, and Inclusion Duties

An employee shall be subject to disciplinary action, including termination of employment, if the employee, intentionally or knowingly:

- Engages in diversity, equity, and inclusion (DEI) duties.
- Assigns to another individual DEI duties.

[See BT(LEGAL)]

Social Transitioning

An employee shall be prohibited from assisting a District student with social transitioning, as the term is defined in law. This prohibition includes providing any information to a District student about social transitioning or guidelines intended to assist a District student with social transitioning.

Safety Requirements

Each employee shall adhere to District safety rules and regulations and shall report unsafe conditions or practices to the appropriate supervisor.

Harassment or Abuse

An employee shall not engage in prohibited harassment, including sexual harassment, of:

1. Other employees. [See DIA]
2. Students. [See FFH; see FFG regarding child abuse and neglect.]

While acting in the course of employment, an employee shall not engage in prohibited harassment, including sexual harassment, of other persons, including Board members, vendors, contractors, volunteers, or parents.

An employee shall report child abuse or neglect as required by law. [See FFG]

Relationships with Students

An employee shall not form romantic or other inappropriate social relationships with students. Any sexual relationship between a student and a District employee is always prohibited, even if consensual.

As required by law, the District shall notify the parent of a student with whom a District employee or person acting as a service provider for the District is alleged to have engaged in certain misconduct.

[See FFF for parent notification requirements and DHB and DHC for reporting requirements.]

Tobacco and Nicotine Products and E-Cigarettes

An employee is prohibited from possessing or using any type of tobacco product, e-cigarette, or any other electronic vaporizing device while on school property, in a District vehicle, or while attending an off-campus school-related activity. An employee is also prohibited from possessing or using any type of nicotine product, including nicotine pouches, regardless of whether the product contains tobacco, while on District property, in a District vehicle, or while attending an off-campus school-related activity.

An employee's supervisor is authorized to approve an exception to this policy for a smoking cessation product.

Alcohol and Drugs / Notice of Drug-Free Workplace

As a condition of employment, an employee shall abide by the terms of the following drug-free workplace provisions. An employee shall notify the Superintendent in writing if the employee is convicted for a violation of a criminal drug statute occurring in the workplace in accordance with Arrests, Indictments, Convictions, and Other Adjudications, below.

An employee shall not manufacture, distribute, dispense, possess, use, or be under the influence of any of the following substances during working hours while on District property or at school-related activities during or outside of usual working hours:

1. Any controlled substance or dangerous drug as defined by law, including but not limited to marijuana, any narcotic drug, hallucinogen, stimulant, depressant, amphetamine, or barbiturate.
2. Alcohol or any alcoholic beverage.
3. Any abusable glue, aerosol paint, or any other chemical substance for inhalation.
4. Any other intoxicant or mood-changing, mind-altering, or behavior-altering drug.

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

Exceptions

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

1. Manufactures, possesses, or dispenses a substance listed above as part of the employee's job responsibilities;
2. Uses or possesses a controlled substance or drug authorized by a licensed physician prescribed for the employee's personal use; or

3. Possesses a controlled substance or drug that a licensed physician has prescribed for the employee's child or other individual for whom the employee is a legal guardian.

Sanctions

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

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

Notice

Employees shall receive a copy of this policy.

Arrests, Indictments, Convictions, and Other Adjudications

An employee shall notify his or her principal or immediate supervisor within three calendar days of any arrest, indictment, conviction, no contest or guilty plea, or other adjudication of the employee for any felony, any offense involving moral turpitude, and any of the other offenses as indicated below:

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

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

Qualifications

A person may not be employed as a superintendent unless the person holds an appropriate certificate or permit.

The commissioner may waive the requirement for certification of a superintendent if requested by a district as provided by Education Code 7.056 [see BF]. The commissioner may limit the waiver of certification in any manner the commissioner determines is appropriate.

A person who is not certified as a superintendent may not be employed by a district as the superintendent before the person has received a waiver of certification from the commissioner. A person may be designated to act as a temporary or interim superintendent for a district, but the district may not employ the person under a contract as superintendent unless the person has been certified or a waiver has been granted.

Education Code 21.003

Duties

A superintendent is the educational leader and chief executive officer of a district. *Education Code 11.201(a)*

The duties of a superintendent include:

1. Assuming administrative responsibility and leadership for the planning, organization, operation, supervision, and evaluation of the education programs, services, and facilities of a district and for the annual performance appraisal of the district's staff.
2. Except as provided by Education Code 11.202 (duties of principal) [see DK and DPA], assuming administrative authority and responsibility for the assignment, supervision, and evaluation of all personnel of a district other than the superintendent.
3. Overseeing compliance with the standards for school facilities. [See CS]
4. Initiating the termination or suspension of an employee or the nonrenewal of an employee's term contract. [See DF series]
5. Managing the day-to-day operations of a district as its administrative manager, including implementing and monitoring plans, procedures, programs, and systems to achieve clearly defined and desired results in major areas of district operations.
6. Preparing and submitting to a board a proposed budget and administering the budget.

7. Preparing recommendations for policies to be adopted by a board and overseeing the implementation of adopted policies.
8. Developing or causing to be developed appropriate administrative regulations to implement policies established by a board.
9. Providing leadership for the attainment and, if necessary, improvement of student performance in a district based on the state's student achievement and quality of learning indicators and other indicators as may be adopted by the commissioner or the board. [See AIA]
10. Organizing a district's central administration.
11. Consulting with the district-level committee. [See BQA]
12. Ensuring:
    a. Adoption of a Student Code of Conduct [see FO] and enforcement of that Code of Conduct; and
    b. Adoption and enforcement of other student disciplinary rules and procedures as necessary.
13. Submitting reports as required by state or federal law, rule, or regulation, and ensuring that a copy of any report required by federal law, rule, or regulation is also delivered to the Texas Education Agency (TEA).
14. Providing joint leadership with a board to ensure that the responsibilities of the board and superintendent team are carried out; and
15. Performing any other duties assigned by action of a board.

Education Code 11.201(d)

In addition, a superintendent shall, on a day-to-day basis, ensure the implementation of the policies created by the board. *Education Code 11.1512(a)*

Collaboration with the Board

A board and a superintendent shall work together to:

1. Advocate for the high achievement of all district students;
2. Create and support connections with community organizations to provide community-wide support for the high achievement of all district students;
3. Provide educational leadership for a district, including leadership in developing the district vision statement and long-range educational plan [see AE];

4. Establish district-wide policies and annual goals that are tied directly to the district's vision statement and long-range educational plan;

5. Support the professional development of principals, teachers, and other staff; and

6. Periodically evaluate board and superintendent leadership, governance, and teamwork.

Education Code 11.1512(b)

Prohibited Interference

A superintendent may not interfere with an appearance or testimony of specified district personnel required by the board. *Education Code 11.1511(d)* [See BAA]

Certification of Compliance With Certain Laws

Do Not Hire Registry

Each year, the superintendent shall certify to the commissioner that the district has complied with the requirements of Education Code 22A.151 (registry of persons not eligible for employment in or provision of services to educational entities). *Education Code 22A.151(g)*

Diversity, Equity, and Inclusion and Instructional Prohibitions

Not later than September 30 each year, the superintendent shall certify to TEA that the district is in compliance with Education Code 39.008, 11.005, and 28.0022. *Education Code 39.008(a)* [See BT(LEGAL) for provisions related to certification requirements.]

Testimony Before SBOE

If the commissioner finds against a school district under Education Code 7.057 in at least five grievances to which that section applies involving the district during the school year, the superintendent must appear before the SBOE to testify regarding the commissioner's findings and the frequency of grievances against the district. *Education Code 26A.004*

Definitions

"Diversity, equity, and inclusion duties" means:

1. Influencing hiring or employment practices with respect to race, sex, color, or ethnicity except as necessary to comply with state or federal antidiscrimination laws;
2. Promoting differential treatment of or providing special benefits to individuals on the basis of race, color, or ethnicity;
3. Developing or implementing policies, procedures, trainings, activities, or programs that reference race, color, ethnicity, gender identity, or sexual orientation, except for the purpose of student recruitment efforts by colleges and universities designated as historically black colleges and universities in collaboration with school districts, or as necessary to comply with state or federal law;
4. Compelling, requiring, inducing, or soliciting any person to provide a diversity, equity, and inclusion statement or giving preferential consideration to any person based on the provision of a diversity, equity, and inclusion statement.

Education Code 11.005(a)

Prohibited Activities

Except as required by state or federal law, a district may not assign diversity, equity, and inclusion duties to any person and must prohibit a district employee, contractor, or volunteer from engaging in diversity, equity, and inclusion duties at, for, or on behalf on the district.

Discipline Policy

The district shall adopt a policy and procedure for the appropriate discipline, including termination, of a district employee or contractor who intentionally or knowingly engages in or assigns to another person diversity, equity, and inclusion duties. The policy and procedure adopted by the district must ensure that an employee or contractor receives adequate due process and an opportunity to appeal disciplinary actions, including termination, in the same manner provided for other disciplinary actions.

Notice

The district shall provide a physical and electronic copy of the policy and procedure to each district employee or contractor.

Education Code 11.005(b)-(d)

Activities Not Prohibited

Nothing in this policy may be construed to:

1. Limit or prohibit a district from contracting with historically underutilized businesses or businesses owned by members of a minority group or by women in accordance with applicable state law;

2. Limit or prohibit a district from acknowledging or teaching the significance of state and federal holidays or commemorative months and how those holidays or months fit into the themes of history and the stories of this state and the United States of America in accordance with the TEKS adopted under Education Code, Subchapter A, Chapter 28;

3. Affect a student's rights under the First Amendment to the U.S. Constitution or Section 8, Article I, Texas Constitution;

4. Limit or prohibit a school district from analyzing school-based causes and taking steps to eliminate unlawful discriminatory practices as necessary to address achievement gaps and differentials described by Education Code 39.053; or

5. Apply to:

   a. Classroom instruction that is consistent with the TEKS adopted by the State Board of Education;

   b. The collection, monitoring, or reporting of data;

   c. A policy, practice, procedure, program, or activity intended to enhance student academic achievement or postgraduate outcomes that is designed and implemented without regard to race, sex, color, or ethnicity; or

   d. A student club that is in compliance with the requirements of Education Code 33.0815.

Education Code 11.005(e)

Certification Required

Not later than September 30 of each year, the superintendent of a school district shall certify to the Texas Education Agency (TEA) that the district is in compliance with Education Code 11.005 (prohibition on diversity, equity, and inclusion duties) and the instructional requirements and prohibitions under Education Code 28.0022 [see EMB]. The certification shall be submitted electronically. TEA shall post each certification received under Education Code 39.008(a) on TEA's website.

Requirements

The certification must include:

1. A description of the policies and procedures required by Education Code 11.005(c) and 28.0022(h) and the manner in which district employees and contractors were notified of those policies and procedures;

2. Any existing policies, programs, procedures, or trainings that were altered to ensure compliance with Education Code 39.008, 11.005, or 28.0022; and

3. Any cost savings resulting from actions taken by the school district to comply with this section.

Board Approval

The certification required by Education Code 39.008(a) must be approved by a majority vote of the board at a public meeting that includes an opportunity for public testimony and for which notice was posted on the district's website at least seven days before the date on which the meeting is held.

Education Code 39.008

Table of Contents

Instructional Materials and Technology Furnished Without Cost to Students 2
Instructional Materials and Technology Allotment 2
Allotment Adjustment 2
Permitted Expenditures 3
Prohibited Expenditures 4
Technological Equipment 5
Instructional Materials and Technology Account 5
Availability of Allotment Funds 6
Additional State Aid 6
For State-Approved Instructional Materials 6
For Open Education Resource Instructional Materials 7
Purchasing Method 8
Requisitions, Use, and Distribution 8
Delegation of Authority 8
Local Funds 8
Online Requisition Program 8
Distribution 8
OER Instructional Materials 8
OER Transition Plan 9
OER Instructional Material Support Program 10
Requisition 11
Parent Portal 11
Bilingual Instructional Materials 11
Certification of Instructional Materials 11
Annual Report 12
Ownership 12
Responsibility for Instructional Materials and Equipment 12
Acceptable Condition 13
Lost or Damaged Instructional Materials 14
Sale or Disposal 14
Sale 14
Disposal 14

Note: For provisions regarding selection and adoption of instructional materials, see EFA.

Instructional Materials and Technology Furnished Without Cost to Students

Instructional materials selected for use in the public schools shall be furnished without cost to the students attending those schools. Except as provided by Education Code 31.104(d), a district may not charge a student for instructional material or technological equipment purchased by the district with the district's technology and instructional materials allotment. *Education Code 31.001*

Each instructional material, including electronic instructional material only to the extent of any applicable licensing agreement, purchased as provided by Education Code Chapter 31 for a district is the property of the district. *Education Code 31.102(a)-(b)*

Instructional Materials and Technology Allotment

A district is entitled to an allotment each biennium from the state instructional materials and technology fund for each student enrolled in the district on a date during the last year of the preceding biennium specified by the commissioner of education. The commissioner shall determine the amount of the allotment per student each biennium on the basis of the amount of money available in the state instructional materials and technology fund to fund the allotment. The allotment shall be transferred from the state instructional materials and technology fund to the credit of the district's instructional materials and technology account as provided by Education Code 31.0212. *Education Code 31.0211(a)*

The commissioner shall, as early as practicable during each biennium, notify each district of the estimated amount to which the district will be entitled during the next fiscal biennium. *Education Code 31.0215(a)*

The commissioner shall determine the amount of the Instructional Materials and Technology Allotment for a district based on PEIMS student enrollment data from the fall snapshot collection of the school year preceding the first year of each biennium.

The amount of the allotment determined by the commissioner is final and may not be appealed.

19 TAC 67.1001(a), (d)

Allotment Adjustment

Change in Enrollment

Not later than May 31 of each school year, a district may request that the commissioner adjust the number of students for which the district is entitled to receive an allotment on the grounds that the number of students attending school in the district will increase or decrease during the school year for which the allotment is provided. The commissioner may also adjust the number of students

for which a district is entitled to receive an allotment, without a request by the district, if the commissioner determines a different number of students is a more accurate reflection of students who will be attending school in the district. The commissioner's determination is final. *Education Code 31.0211(e)*

High Enrollment Growth

Each year the commissioner shall adjust the instructional materials and technology allotment of districts experiencing high enrollment growth. *Education Code 31.0214(a)*

Permitted Expenditures

The allotment funds may be used to purchase or pay for:

1. Instructional materials, regardless of whether the instructional materials are on the list of approved instructional materials maintained by the State Board of Eduction (SBOE) under Education Code 31.022;
2. Consumable instructional materials;
3. Instructional materials for use in bilingual education classes, as provided by Education Code 31.029;
4. Instructional materials for use in college preparatory courses under Education Code 28.014, as provided by Education Code 31.031;
5. Supplemental instructional materials;
6. OER instructional materials, as provided by Education Code Chapter 31, Subchapter B-1;
7. Instructional materials and technological equipment under any continuing contracts of the district in effect on September 1, 2011;
8. Technological equipment necessary to support the use of any instructional materials purchased with an allotment under this provision;
9. Inventory software or systems for storing, managing, and accessing instructional materials and analyzing the usage and effectiveness of instructional materials;
10. Services, equipment, and technology infrastructure necessary to ensure internet connectivity and adequate bandwidth;
11. Training educational personnel directly involved in student learning in the appropriate use of instructional materials and for providing for access to technological equipment for instructional use;

12. Training personnel in the electronic administration of assessment instruments;

13. The salary and other expenses of an employee who provides technical support for the use of technological equipment directly involved in student learning;

14. Costs associated with distance learning, including services, equipment, and technology such as Wi-Fi, internet access hotspots, wireless network service, broadband service, and other services and technological equipment necessary to facilitate internet access;

15. Costs associated with providing parental access to the district's library materials catalog and the ability to submit a list of library materials that the parent's child is not allowed to access as required by Education Code 33.023. [See EFB]

16. Formats of instructional materials that are fully accessible to students with disabilities;

17. Activities related to the local review and adoption of instructional materials;

18. Software for analyzing the use and effectiveness of instructional materials;

19. Software for analyzing the appropriateness of instructional materials necessary for the teaching of, instruction in, or demonstration of knowledge of the essential knowledge and skills adopted under Education Code 28.002; and

20. Costs associated with complying with Education Code 33.023, relating to parental access to library catalog and access by the parent's child to certain library materials.

Education Code 31.0211(c), 33.023(d); 19 TAC 67.1001(e)

Prohibited Expenditures

The allotment funds may not be used to purchase instructional material that:

1. Contains obscene or harmful content or would otherwise cause the district to which the funds were allotted to be unable to submit the certification required under Education Code 31.1011(a)(1)(B) [see Certification of Instructional Materials, below]; or

2. Is on the list of rejected instructional materials maintained by the SBOE.

Education Code 31.0211(f)

Allotment funds may not be used to pay for:

1. Services for installation;
2. The physical conduit that transmits data, such as cabling and wiring, or electricity;
3. Office and school supplies;
4. Items that are not directly related to student instruction, such as furniture, athletic equipment, extension cords, temporary contractors, or video surveillance equipment;
5. Travel expenses;
6. Equipment used for moving or storing instructional materials;
7. Instructional material that contains obscene or harmful content or would otherwise cause the district to be unable to submit the certification required under Education Code 31.11011(a)(1)(B); or
8. Instructional material that incorporates three-cueing in the phonics curriculum required under Education Code, Chapter 28.

19 TAC 67.1001(f)

A district may not adopt or otherwise use instructional material included on the list of rejected instructional materials maintained by the SBOE. *Education Code 31.024*

Technological Equipment

In purchasing technological equipment, a district shall:

1. Secure technological solutions that meet the varying and unique needs of students and teachers in the district; and
2. Consider both the long-term cost of ownership of the technological equipment and flexibility for innovation.

Education Code 31.0211(d)

Instructional Materials and Technology Account

The commissioner shall maintain an instructional materials and technology account for each district. In the first year of each biennium, the commissioner shall deposit the district's allotment in the account. The commissioner shall pay the cost of instructional materials requisitioned by a district under Education Code 31.103 using funds from the district's instructional materials and technology account.

Money deposited in a district's instructional materials and technology account during each state fiscal biennium remains in the account and available for use by the district for the entire biennium.

At the end of each biennium, a district with unused money in the district's account may carry forward any remaining balance to the next biennium.

A district shall provide to TEA the title and publication information for any instructional materials requisitioned or purchased by the district with the district's instructional materials and technology allotment.

Education Code 31.0212(a)-(d)

Availability of Allotment Funds

The allotment for each biennium will be made available for district use through EMAT as early as possible in the fiscal year preceding the beginning of the biennium for which the funds have been appropriated.

A district may access its allotment funds for an upcoming school year after submitting to the commissioner:

1. Certification that the school district or open-enrollment charter school has instructional materials that cover all the required TEKS, except those for physical education, as required by Education Code 31.1011;
2. Certification that the school district or open-enrollment charter school has used its allotment for only allowable expenditures; and
3. Information regarding the instructional materials used by the district during the previous school year, including the cost of each material as required by Education Code 31.1012.

Upon completion of the requirements, a district may access its allotment funds by correctly providing all the information required in the state ordering system.

Information required in the state ordering system may include verification of TEKS coverage for certain disbursement requests.

19 TAC 67.1001(g)-(j)

Additional State Aid

For State-Approved Instructional Materials

For each student enrolled in the district, a school district is entitled to additional state aid for each school year in an amount equal to $40, or a greater amount provided by appropriation, to procure instructional material that has been reviewed by the Texas Education Agency (TEA); placed on the SBOE list of approved instructional materials; designated by the SBOE as being included or capable of being included in an instructional materials parent portal; and acquired from a publisher, manufacturer, or other entity that has not been found to violate Education Code 31.151. *Education Code 48.307(a)*

A district is entitled to the amount of state aid provided by 19 Administrative Code 67.1003(a) each school year, regardless of whether the district uses the amount during the school year for which the amount was provided. *19 TAC 67.1003(i)*

For Open Education Resource Instructional Materials

Subject to Education Code 31.0751 (Open Education Resource [OER] transition plan), a district is entitled to additional state aid for each school year in an amount not to exceed $20 for each student for the costs incurred or for which the district is obligated to pay during the school year in which the aid is provided for the printing and shipping of OER instructional material made available under Education Code Chapter 31, Subchapter B-1. *Education Code 48.308(a)*

Amount of Additional State Aid

The commissioner of education shall determine the amount of the additional state aid for OER instructional materials for a district based on PEIMS student enrollment data from the fall snapshot collection of the current school year.

Before PEIMS student enrollment data from the fall snapshot collection of the current school year is available, a district will have an expected allotment amount that is based on 90 percent of the PEIMS student enrollment data from the fall snapshot collection of the previous school year.

Funds may only be used for the costs incurred or for which a district is obligated to pay during the school year in which the aid is provided.

Requisitions

Requisitions for funding must be submitted in TEA's online requisition and disbursement system (EMAT) before August 31 of the fiscal year in which the aid is provided.

The entitlements for each year will be made available for district use through EMAT as early as possible in the fiscal year for which the funds have been appropriated.

Permissible Use of Additional State Aid

The additional state aid for OER instructional materials may be used to purchase:

1. OER instructional material placed on the list of approved materials outlined in Education Code 31.022, including any non-text components of the approved product, such as manipulative kits; and
2. OER instructional material components placed on the list of approved materials outlined in Education Code 31.022, only after an initial purchase of all components of the product.

The additional state aid for OER instructional materials may not be used to purchase or reimburse for:

1. Instructional material or material components not on the list of approved instructional materials;
2. Instructional material placed on the rejected list of instructional materials;
3. Instructional material that promotes three-cueing as defined in Education Code 28.0062(a-1); or
4. Printing of SBOE-approved OER material, which may be otherwise procured through a requisition in EMAT.

The commissioner may grant a waiver to exempt a district from an initial purchase of each component of an approved product if the district can demonstrate that it already possesses an identical or near-identical component for each student and/or teacher as indicated by the product design.

19 TAC 67.1004

Purchasing Method

A district is not required to use a method provided by Education Code 44.031(a) to purchase instructional materials that have been reviewed by TEA and included on the list of approved instructional materials maintained by the SBOE. *Education Code 31.102(d)*

Requisitions, Use, and Distribution

The board may delegate to an employee the authority to requisition, distribute, and manage the inventory of instructional materials, consistent with Education Code Chapter 31 and rules adopted under that chapter. *Education Code 31.104(a)*

Delegation of Authority

Local Funds

A district may use local funds to purchase any instructional materials in addition to those selected under Education Code Chapter 31. *Education Code 31.106*

Online Requisition Program

A district shall make a requisition for instructional materials using EMAT. A district may requisition instructional materials for grades above the grade level in which a student is enrolled. *Education Code 31.103(b)-(c)*

Distribution

The board shall distribute printed instructional materials to students in the manner that the board determines is most effective and economical. *Education Code 31.102(c)*

OER Instructional Materials

A district may adopt OER instructional material at any time. A district may only adopt or otherwise use an OER instructional material that is not included on the list of rejected instructional materials maintained by the SBOE.

Except as otherwise provided by the Education Code, the commissioner may not require a district to adopt or use an OER instructional material. A district may not be charged for a cost associated with the selection of an OER instructional material, except for the cost of printing copies of the material. *Education Code 31.073*

OER Transition Plan

To qualify for additional state aid under Education Code 48.308, the board must adopt an OER instructional material transition plan to assist classroom teachers in the district who will be using an OER instructional material in a specific subject or grade level for which the teacher has not previously used an OER instructional material.

The plan must ensure that OER instructional materials are used in a manner that maintains the instructional flexibility of a classroom teacher to address the needs of each student.

A district that participates in the program developed and maintained by TEA under Education Code 31.0752 is not required to adopt a transition plan under this provision. [See OER Instructional Material Support Program, below]

Education Code 31.0751

The OER instructional material transition plan shall be submitted in a format determined by the commissioner.

A district is required to have a locally maintained OER transition plan that complies with 19 Administrative Code 67.1315 to access funding allotted under Education Code 48.308.

A district is required to submit an OER instructional material transition plan only when:

1. First adopting an SBOE-approved OER product for a grade level or subject/course; or
2. Expanding implementation of an SBOE-approved OER product to additional campuses and/or grade levels.

The OER instructional material transition plan adopted by the board of trustees shall include the plan of the district to ensure the following:

1. Clear communication and stakeholder change management plans and timelines;
2. Timely access to print materials and related manipulatives through OER procurement and distribution;

3. Sufficient planning and instructional time evidenced by instructional calendars and master schedules aligned to the requirements of the materials;

4. Clear expectations for the implementation of:

   a. Instructional materials;

   b. Internalization and student work analysis protocols; and

   c. Curriculum-embedded assessments;

5. Processes for stakeholder communication and public posting, as outlined in Education Code 26.006, if materials have been modified by the district;

6. The maintenance of instructional flexibility through clear guidance for acceptable teacher modifications to instructional pacing, sequencing, and lesson content to address the needs of each student; and

7. Sufficient professional learning and development for school leaders, instructional coaches, and teachers, including:

   a. Pre-service product onboarding and orientation; and

   b. Ongoing, job-embedded, curriculum-based professional learning, including cycles of observation and feedback.

The commissioner may request and review OER instructional material transition plans before funding is released and reject a plan subsequent to review.

19 TAC 67.1315

OER Instructional Material Support Program

TEA shall develop and maintain a program to assist school districts in adopting and using OER instructional material, including by assisting districts to:

1. Maintain the instructional flexibility of classroom teachers to address the needs of each student; and

2. Schedule instructional periods in a manner that allows classroom teachers sufficient time to effectively prepare and present instructional material within the teacher's normal work day.

TEA shall engage in efforts to meet the demand from districts that request assistance for the 2024-25 or 2025-26 school year. Until September 1, 2027, a school district may apply assistance received to offset the payment of costs related to implementing OER

instructional material, regardless of whether the district incurred the cost before receiving the assistance.

Education Code 31.0752

Requisition

A district that selects OER instructional material shall requisition a sufficient number of printed copies for use by students unable to access the instructional material electronically unless the district provides to each student:

1. Electronic access to the instructional material at no cost to the student; or
2. Printed copies of the portion of the instructional material that will be used in the course.

Education Code 31.103(d)

Parent Portal

An entity that hosts an instructional materials parent portal must comply with requests regarding parental access to the portal made by a district in compliance with Education Code 31.154 or Education Code 26.006 [see EFA]. *Education Code 31.154(e)*

[For more information regarding the requirements for certain entities that supply instructional materials to host a parent portal, see Education Code 31.154.]

Bilingual Instructional Materials

A district shall purchase with its allotment or otherwise acquire instructional materials for use in bilingual education classes. *Education Code 31.029*

Certification of Instructional Materials

Prior to the beginning of each school year, a district shall submit to the SBOE and commissioner certification that the district:

1. For each subject in the required curriculum under Education Code 28.002, other than physical education, and each grade level:
    a. Provides each student with instructional materials that cover all elements of the essential knowledge and skills adopted by the SBOE for that subject and grade level; and
    b. In the provision of instructional materials, the district protects students from obscene or harmful content as necessary for compliance with the Children's Internet Protection Act (Pub. L. No. 106-554) [see CQ], Education Code 28.0022 [see EMB], Penal Code 43.22, and any other law or regulation that protects students from obscene or harmful content [see EFA]; and

2. The district used money allocated to the district or school under the instructional materials and technology allotment only for purposes allowed under Education Code 31.0211.

To determine whether each student has instructional materials that cover all elements of the essential knowledge and skills, a district may consider:

1. Instructional materials adopted by the SBOE;
2. Instructional materials developed, purchased, or otherwise acquired by the district; and
3. OER instructional materials and other electronic instructional materials included in the repository under Education Code 31.0722.

Education Code 31.1011

Annual Report

Each district shall annually report to TEA information regarding the instructional materials used by the district during the previous school year, including the cost of each material. *Education Code 31.1012*

Ownership

Except as otherwise provided, a student must return all instructional materials to the teacher at the end of the school year or when the student withdraws from school. At the end of the school year for which OER instructional material that a district does not intend to use for another student is distributed, the printed copy of the OER instructional material becomes the property of the student to whom it is distributed.

This provision does not apply to an electronic copy of OER instructional material.

Education Code 31.104(c), (g)-(h)

Responsibility for Instructional Materials and Equipment

Each student or the student's parent or guardian is responsible for all instructional material and technological equipment not returned in an acceptable condition by the student. A student who fails to return in an acceptable condition all instructional materials and technological equipment forfeits the right to free instructional materials and technological equipment until all instructional materials and technological equipment previously issued but not returned in an acceptable condition are paid for by the student, parent, or guardian.

As provided by board policy, a district may waive or reduce the payment required if the student is from a low-income family. [See FP] The district shall allow the student to use instructional materials and technological equipment at school during each school day.

If instructional materials or technological equipment is not returned in an acceptable condition or paid for, a district may withhold the student's records. A district may not prevent the student from graduating, participating in a graduation ceremony, or receiving a diploma. [See FL and GBA regarding student and parental right to access records; and FD, FFAB, and FL regarding a district's duties to provide records to another district]

The board may not require an employee of the district who acts in good faith to pay for instructional materials or technological equipment that is stolen, misplaced, or not returned by a student. [See DG]

These provisions do not apply to an electronic copy of OER instructional material.

Education Code 31.104(d), (e), (h) [See also EFA]

Acceptable Condition

Printed instructional materials are considered to be in acceptable condition if:

1. The cover, binding, pages, spine, and all integral components of the instructional materials are wholly intact and the instructional materials are fully usable by students; and
2. No component of the instructional materials is soiled, torn, or damaged (whether intentionally or by lack of appropriate care) to the extent that any portion of the content is too disfigured or obscured to be fully accessible to other students.

Electronic instructional materials are considered to be in acceptable condition if:

1. All components or applications that are a part of the electronic instructional materials are returned;
2. The electronic materials perform as they did when they were new;
3. The electronic instructional materials do not contain computer code (e.g., bug, virus, worm, or similar malicious software) that has been designed to self-replicate, damage, change, or otherwise hinder the performance of any computer's memory, file system, or software; and
4. The electronic instructional materials have not been installed with plug-ins, snap-ins, or add-ins without the prior approval of the district.

Technological equipment is considered to be in acceptable condition if:

1. The equipment is returned with the software and hardware in their original condition unless the district authorized changes; and

2. The physical condition of the equipment is fully usable as it was originally intended to be used.

19 TAC 66.1310

Lost or Damaged Instructional Materials

A district may order replacements for instructional materials that have been lost or damaged directly from the publisher of the instructional materials or any source for a printed copy of OER instructional material. *Education Code 31.104(b)*

Sale or Disposal

The board shall determine how the district will dispose of discontinued printed instructional materials, electronic instructional materials, and technological equipment.

Sale

The board may sell printed instructional materials on the date the instructional material is discontinued for use in the public schools by the SBOE or the commissioner. The board may also sell electronic instructional materials and technological equipment owned by the district.

Use of Proceeds

Any funds received by a district from a sale must be used to purchase instructional materials and technological equipment allowed under Education Code 31.0211.

Disposal

The board may dispose of printed instructional material before the date the instructional material is discontinued for use in the public schools by the SBOE if the board determines that the instructional material is not needed by the district and the board does not reasonably expect that the instructional material will be needed. A district must notify the commissioner of any instructional material the district disposes of under this provision.

Education Code 31.105

District Information Required on Website

A district that at any time on or after January 1, 2019, maintained a publicly accessible internet website shall post on a publicly accessible website the following information:

1. The district's contact information, including a mailing address, telephone number, and email address;
2. Each member of the board;
3. The date and location of the next election for board members [see BB series];
4. The requirements and deadline for filing for candidacy of board member, which shall be continuously posted for at least one year before the election day for the office [see BB series];
5. Each notice of a meeting of the board under Government Code Chapter 551, Subchapter C [see BE]; and
6. Each record of a meeting of the board under Government Code 551.021 [see BE].

Items 5 and 6 above do not apply to a district with a population of less than 5,000 in the district's boundaries and located in a county with a population of less than 25,000.

Gov't Code 2051.201

Note: See GBA regarding the confidentiality of certain board member information.

Required Trustee Information

Each district that maintains an internet website shall post on the website the name, email address, and term of office, including the date the term began and the date the term expires, of each member of the district's board of trustees. If a district does not maintain an internet website, the district shall submit the information required above to the Texas Education Agency (TEA). On receipt of the district's information, TEA shall post the information on TEA's internet website.

Not later than the 30th day after a new person is sworn in as a member of a district's board, the district shall update the information required above and, as applicable, post the updated information on the district's internet website or submit the updated information to TEA for posting on TEA's internet website.

A district shall annually submit to TEA the information required above for each member of the district's board of trustees. The in-

formation must identify the member designated as chair and be updated as required.

Education Code 11.1518

Note: The following is an index of website posting requirements that are addressed in the legal reference material of the policy manual. The required postings are listed in the order they appear in the policy manual. The list is not all-inclusive. The list does not address postings that are required in response to a specific incident or postings required under special circumstances.

Required Website Postings

The following posting requirements apply to a district that maintains an internet website:

1. A board may not vote on adoption of a proposed local innovation plan unless the final version of the proposed plan has been available on the district website for at least 30 days. *Education Code 12A.005(a)(1); 19 TAC 102.1307(a)(1)* [See AF]

2. A district designated as a district of innovation shall ensure that a copy of its current local innovation plan is available to the public by posting and maintaining the plan in a prominent location on the district's website. *Education Code 12A.0071(a); 19 TAC 102.1305(e), .1307(f)* [See AF]

3. Not later than 30 days after an accreditation status of accredited-warned, accredited-probation, or not accredited-revoked is assigned, a district must post notice on the home page of its website with a link to the required notification and maintain this until the district is assigned the accredited status. *19 TAC 97.1055(f)* [See AIA]

4. A district with a local accountability system must produce a campus scorecard and make available on the district website an explanation of the methodology used to assign local accountability performance ratings. *19 TAC 97.1003(g)* [See AIA]

5. A board shall disseminate its Texas Academic Performance Report (TAPR) by posting it on the district website. *19 TAC 97.1008(f)* [See AIB]

6. Not later than the 10th day after the first day of instruction of each school year, a district shall make available each campus report card, the district's performance report, the district's accreditation status and performance rating, and a definition and

explanation of each accreditation status. *Education Code 39.362* [See AIB]

7. A district shall post its annual federal report card. *20 U.S.C. 6311(h)(2)* [See AIB]

8. A district or campus assigned a rating of D that qualifies under Education Code 39.0543(b) must notify the public of the meeting for input for the development of a local improvement plan 15 days prior to the meeting by way of the district and campus website. *19 TAC 97.1061(b)(3)(A)(ii)* [See AIC]

9. A campus intervention team must notify the public of the meeting for input for the development of a targeted improvement plan 15 days prior to the meeting by way of the district and campus website. *Education Code 39A.056; 19 TAC 97.1061(e)(3)(A)(ii)* [See AIC]

10. A district shall post a targeted improvement plan for a campus assigned an unacceptable performance rating on its website before the board hearing on the plan. *Education Code 39A.057(b)* [See AIC]

11. A district shall notify stakeholders of their ability to review the completed campus turnaround plan and post the completed plan on the district website at least 30 days before the final plan is submitted to the board of trustees. *19 TAC 97.1064(e)* [See AIC]

12. A district shall post required election notices. *Election Code 85.007* [See BBBA]

13. A district shall post required election information. *Election Code 4.009* [See BBBA]

14. The district shall post the branch daily register each day early voting is conducted. *Election Code 85.072* [See BBBA]

15. A district shall post early voting rosters. *Election Code 87.121* [See BBBA]

16. A district shall post election results. *Election Code 65.016* [See BBBB]

17. A district shall post the minutes of the last regular board meeting held before an election of trustees if the minutes reflect that a trustee is deficient in meeting the trustee's training requirement. *Education Code 11.159(b); 19 TAC 61.1(k)* [See BBD]

18. A district shall post a report filed with the district by a candidate, board member, or specific-purpose committee pursuant to Election Code Chapter 254 not later than the 10th business day after it is received. *Election Code 254.0401* [See BBBC]

19. A district shall provide access to conflicts disclosure statements and questionnaires. *Local Gov't Code 176.009* [See BBFA, CHE]

20. A district shall post the statements regarding activities to support and promote student health. *Education Code 28.004* [See BDF]

21. A district must post notice of school health advisory council (SHAC) meetings. *Education Code 28.004(d-1)* [See BDF]

22. A district must post the minutes and audio or video recording of each SHAC meeting. *Education Code 28.004(d-2)* [See BDF]

23. In addition to the other place at which notice or an agenda of a meeting is required to be posted by the Open Meetings Act, a district must also concurrently post notice of a meeting and the agenda for the meeting on the district's website. *Gov't Code 551.056(b)* [See BE]

24. A district that has a student enrollment of 10,000 or more shall post the archived recording, or a link thereto, of its meetings. *Gov't Code 551.128(b-1)* [See BE]

25. A board shall post minutes of a regular or special meeting, as approved by the board, not later than the seventh day after the date of a meeting at which a quorum of the board is present and voting. *Education Code 11.0621(b)(1)* [See BE]

26. A board shall post any resolution adopted by the board not later than the seventh day after the date of the meeting at which the resolution was adopted. *Education Code 11.0621(b)(2)* [See BE]

27. A district must post notice at least seven days before the date on which a meeting is held to discuss the certification of compliance with Education Code 11.005 (prohibition on diversity, equity, and inclusion activities) and 28.0022 (instructional requirements and prohibitions). *Education Code 39.008* [See BJA, BT, EMB]

28. A district conducting a bond election shall post the election order, the election notice, the contents of the proposition, and any sample ballot. *Election Code 4.003(f)* [See CCA]

29. A district conducting a bond election shall post the voter information document beginning not later than the 21st day before election day and ending on the day after the election. *Gov't Code 1251.052(d)* [See CCA]

30. A district issuing capital appreciation bonds shall post required information about the bonds. *Gov't Code 1201.0245* [See CCA]

31. The tax assessor for a district shall post prominently on a district's website a notice informing each owner of property located in the appraisal district that the estimated amount of taxes to be imposed on the owner's property may be found in the property tax database maintained by the appraisal district under Tax Code 26.17. *Tax Code 26.04(e-2)* [See CCG]

32. Not later than 30 days before the date of an election to approve a tax rate, a district must post the results of an efficiency audit. *Education Code 11.184* [See CCG]

33. A district shall include on the home page of its website the prescribed statement if the district increases the amount of taxes to fund maintenance and operation expenditures. *Tax Code 26.05(b)* [See CCG]

34. A district shall maintain a link to the area of the comptroller's website where information on each of the district's agreements to limit appraised value, if any, is maintained. *Former Tax Code 313.0265(c), as continued in effect by Tax Code 313.171* [See CCGB]

35. A district shall post a summary of its proposed budget concurrently with publication of the proposed budget. *Education Code 44.0041* [See CE]

36. In the format prescribed by the comptroller, a district shall post or cause to be posted tax rate and budget information. *Tax Code 26.18* [See CE]

37. A district shall maintain its adopted budget on the district's website until the third anniversary of the date the budget was adopted. *Education Code 44.0051* [See CE]

38. A district shall continuously post its contact information and Annual Local Debt Report until the district posts the next annual report, or, as an alternative, the district may continually maintain a link to the comptroller's website where the district's financial information may be viewed. *Local Gov't Code 140.008; 34 TAC 10.1-.6* [See CFA]

39. A district must post the Landowner's Bill of Rights statement provided by Government Code 402.031 before or at the same time as the district first represents in any manner to a landowner that the district possesses eminent domain authority. *Property Code 21.0112* [See CHG]

40. A district shall post each severance agreement entered into with an employee or independent contractor in a prominent place on its website. *Local Gov't Code 180.011* [See CJ, DEA]

41. Prior to conducting an active threat exercise, a district must provide adequate notice of the exercise through multiple distribution networks, including the district's website. *19 TAC 103.1211(b)(1)* [See CKB]

42. A district must make available information regarding its compliance with requirements related to the transportation of students enrolled in the district who reside outside the district. *Education Code 34.007* [See CNA]

43. If a district adopts the Health and Human Services model guidelines for use of digital devices developed under Education Code 38.0231(a), the district shall post the guidelines. *Education Code 38.0231(d)* [See CQC]

44. A district that does not participate in the uniform group health insurance program (TRS ActiveCare) shall post its comparability report, together with the policy or contract for the group health coverage plan. *Education Code 22.004(d)* [See CRD]

45. A district that is a service provider seeking to limit liability under the Digital Millennium Copyright Act must post information regarding its designated agent. *17 U.S.C. 512(c)(2)* [See CY]

46. A district shall post its employment policy and any regulations referenced. *Education Code 11.1513(a)* [See DC]

47. A district shall post the board's employment policies. *Education Code 21.204(d)* [See DCB]

48. The board shall make publicly available in a prominent location on the district's website procedures for resolving grievances; standardized forms for filing a grievance, a notice of appeal, or a request for a hearing; and the method by which a grievance may be filed electronically. *Education Code 26A.003* [See DGBA, FNG, GF]

49. The board shall adopt and post on the district's website early childhood literacy and mathematics proficiency plans that set specific annual goals. *Education Code 11.185(a)* [See EA]

50. The board shall post on the district's website and on the website, if any, of each campus the annual report of progress toward the goals set under the early childhood literacy and mathematics plans. *Education Code 11.185* [See EA]

51. The board shall post on the district's website and on the website, if any, of each campus the annual report of progress toward the goals set under the college, career, and military readiness plans. *Education Code 11.186* [See EA]

52. A district shall make available on the district's website at the beginning of each semester an instructional plan or course syllabus for each class offered in the district for that semester. *Education Code 26.0062* [See EEP]

53. A district shall post on the home page of the district's website a notice stating that a parent of a student enrolled in the district is entitled to review instructional materials and may request that the district make the instructional materials available for review. *Education Code 26.006(g)* [See EFA]

54. If established, a local school library advisory council shall ensure that notice of the date, hour, place, and subject of its meetings are posted at least 72 hours before the meeting on the district's website, along with minutes and audio or video recording of the meetings. *Education Code 33.025* [See EFB]

55. A district shall post on its website a form adopted by TEA to be used in making written challenges to library materials. *Education Code 33.027* [See EFB]

56. A district shall post curriculum materials used in the district's human sexuality instruction or instruction relating to the prevention of child abuse, family violence, dating violence, and sex trafficking, if the materials are in the public domain. *Education Code 28.004(j)* [See EHAA]

57. A district shall post the transition and employment guide for students enrolled in special education programs and their parents in order to provide information on statewide services and programs that assist in the transition to life outside the public school system. *Education Code 29.0112* [See EHBAD]

58. Each year, a district shall post a report on measurable outcomes for each dropout recovery education program offered by the district. *Education Code 29.081(e-6)* [See EHBC]

59. A district shall make available on the district or campus website by November 1 of each school year a family engagement plan to assist the district in achieving and maintaining high levels of family involvement and positive family attitudes toward education. *19 TAC 102.1003(h)* [See EHBG]

60. Annually, a district shall post any agreement between the district and a public institution of higher education to provide a dual credit program. *Education Code 28.009(b-2)* [See EHDD]

61. A district shall publish information from TEA explaining the advantages of the distinguished level of achievement and each endorsement. *Education Code 28.02121* [See EIF]

62. A district shall post the date the PSAT/NMSQT will be administered and the date any college advanced placement tests will be administered. *Education Code 29.916* [See EK]

63. A district that receives funds under Title 1, Part A shall post on its website and the website of each campus for each grade served, information on each assessment required by the state to comply with 20 U.S.C. 6311, other assessments required by the state, and assessments required districtwide. *20 U.S.C. 6312(e)(2)(B)* [See EKB]

64. A district shall post in a prominent location the form developed by TEA for providing information about parental rights and options. *Education Code 26.001(d)(4)* [See FA]

65. A district shall post information regarding local programs and services, including charitable programs and services, available to assist students who are homeless. *Education Code 33.906* [See FDC]

66. A district shall prominently post information about required and recommended immunizations and procedures for claiming an exemption from immunization requirements. *Education Code 38.019* [See FFAB]

67. Each school year, the board shall post a summary of the Guidelines for the Care of Students with Food Allergies at Risk for Anaphylaxis[1] on the district's website with instructions for obtaining access to the complete guidelines document. *Education Code 38.0151* [See FFAF]

68. A district must prominently display the contact information required to be listed for the Title IX Coordinator and policy. *34 C.F.R. 106.8(b)* [See FFH]

69. A district must make available all materials used to train Title IX coordinators, investigators, decision-makers, and any person who facilitates an informal resolution process. *34 C.F.R. 106.45(b)(10)(i)(D)* [See FFH]

70. To the extent practicable, a district must post the procedure for reporting bullying established by the district's bullying policy. *Education Code 37.0832(e)* [See FFI]

71. A district shall post the email address and dedicated phone number of the campus behavior coordinator for each district campus. *Education Code 26.015* [See FO]

72. A district that suspends the applicability of the requirements of the Public Information Act must provide notice to the public of the suspension. The district must maintain the notice of the suspension during the suspension period. *Gov't Code 552.2325(h)* [See GBAA]

73. If the board designates a method for making a written request for public information, other than mail, email, or hand-delivery, the board must post a statement that a request may be made by that method unless the statement is on the sign required by Government Code 552.205. *Gov't Code 552.234(b)* [See GBAA]

74. A board that allows requestors to use the public information request form created by the attorney general must post the form on the district website. *Gov't Code 552.235* [See GBAA]

75. A district shall post on its website and each campus shall post on any campus website a notice regarding the district's ability to refuse entry or eject certain persons, including the appeal process. *Education Code 37.105; 19 TAC 103.1207(g)* [See GKA]

Optional Website Postings

A district that maintains an internet website has the following options:

1. A board may broadcast an open meeting over the internet. *Gov't Code 551.128* [See BE]

2. A district may make its proposed budget clearly accessible on the home page of the district's website instead of including a physical copy of the proposed budget with the notice of a meeting at which the board will discuss or adopt a budget. *Gov't Code 551.043(c)* [See BE, CCG]

3. A district may publish the superintendent's employment contract on the district's website instead of publishing it in the an-

nual financial management report. *19 TAC 109.1001(q)(3)(B)(i)* [See CFA]

4. Notice of a vacant position for which a certificate or license is required may be provided by posting the position on the district's internet website, rather than on a bulletin board. *Education Code 11.1513* [See DC]

5. A district shall either post online or provide physical copies of the report on library materials. *Education Code 35.006* [See EFB]

6. A district may place on its internet website a current copy of the procedural safeguards notice regarding special education and related services. *34 C.F.R. 300.504(b)* [See EHBAE]

7. A district may provide the annual notice to the parent of each student enrolled in grade 9 or above of the availability of subsidies for certain exam fees and the availability and enrollment qualifications for programs under which a student may earn college credit and career and technology education programs or other work-based education programs in the district. *Education Code 28.010* [See EHDD]

8. A board may post a mailing address and email address designated for receiving written requests for public information on its website. *Gov't Code 552.234(d)* [See GBAA]

Geospatial Data Products

"Geospatial data product" means a document, computer file, or internet website that contains geospatial data; a map; or information about a service involving geospatial data or a map. *Gov't Code 2051.101(1)*

Notice

A district shall include a notice on each geospatial data product that:

1. Is created or hosted by the district;

2. Appears to represent property boundaries; and

3. Was not produced using information from an on-the-ground survey conducted by or under the supervision of a registered professional land surveyor or land surveyor authorized to perform surveys under laws in effect when the survey was conducted.

The notice must be in substantially the following form: "This product is for informational purposes and may not have been prepared for or be suitable for legal, engineering, or surveying purposes. It does not represent an on-the-ground survey and represents only the approximate relative location of property boundaries."

The notice may include language further defining the limits of liability of a geospatial data product producer; apply to a geospatial data product that contains more than one map; or for a notice that applies to a geospatial data product that is or is on an internet website, be included on a separate page that requires the person accessing the website to agree to the terms of the notice before accessing the geospatial data product.

Gov't Code 2051.102

Exemption

A district is not required to include the notice on a geospatial data product that:

1. Does not contain a legal description, a property boundary monument, or the distance and direction of a property line;
2. Is prepared only for use as evidence in a legal proceeding;
3. Is filed with the clerk of any court; or
4. Is filed with the county clerk.

Gov't Code 2051.103

---

[1] TDSHS Guidelines for the Care of Students with Food Allergies at Risk for Anaphylaxis: https://www.dshs.texas.gov/sites/default/files/schoolhealth/pdf/FINAL%20Guidelines%20for%20Food%20Allergies%203.2023.pdf

Employee Free Speech

District employees do not shed their constitutional rights to freedom of speech or expression at the schoolhouse gate.

However, neither an employee nor anyone else has an absolute constitutional right to use all parts of a school building or its immediate environs for unlimited expressive purposes. When a public employee makes statements pursuant to his or her official duties, the employee is not speaking as a citizen for First Amendment purposes, and the Constitution does not insulate the communications from employer discipline.

Garcetti v. Ceballos, 547 U.S. 410 (2006); Tinker v. Des Moines Indep. Cmty. Sch. Dist., 393 U.S. 503 (1969) [See also GKD]

Whistleblower Protection

A board or its agents shall not suspend or terminate the employment of, or take other adverse personnel action against, an employee who in good faith reports a violation of law by a district or another public employee to an appropriate law enforcement authority.

A "report" is made to an "appropriate law enforcement authority" if the authority is a part of a state or local governmental entity or the federal government that the employee in good faith believes is authorized to:

1. Regulate under or enforce the law alleged to be violated in the report; or
2. Investigate or prosecute a violation of criminal law.

Gov't Code 554.002

A supervisor who suspends or terminates the employment of or takes an adverse personnel action against an employee for reporting a violation of law shall be subject to civil penalties. *Gov't Code 554.008*

Definitions

"Employee" means an employee or appointed officer who is paid to perform services for a district. It does not include independent contractors. *Gov't Code 554.001(4)*

"Law" means a state or federal statute, an ordinance of a local governmental entity, or a rule adopted under a statute or ordinance. *Gov't Code 554.001(1)*

A "good faith" belief that a violation of the law occurred means that:

1. The employee believed that the conduct reported was a violation of law; and

2. The employee's belief was reasonable in light of the employee's training and experience.

Wichita County v. Hart, 917 S.W.2d 779 (Tex. 1996)

A "good faith" belief that a law enforcement authority is an appropriate one means:

1. The employee believed the governmental entity was authorized to:
   a. Regulate under or enforce the law alleged to be violated in the report, or
   b. Investigate or prosecute a violation of criminal law; and
2. The employee's belief was reasonable in light of the employee's training and experience.

Tex. Dep't of Transp. v. Needham, 82 S.W.3d 314 (Tex. 2002)

Whistleblower Complaints

An employee who alleges a violation of whistleblower protection may sue a district for injunctive relief, actual damages, court costs, and attorney's fees, as well as other relief specified in Government Code 554.003. *Gov't Code 554.003*

Initiate Grievance

Before suing, an employee must initiate action under a district's grievance policy or other applicable policies concerning suspension or termination of employment or adverse personnel action.

The employee must invoke a district's grievance procedure not later than the 90th day after the date on which the alleged suspension, termination, or other adverse employment action occurred or was discovered by the employee through reasonable diligence.

Legal Action

If a board does not render a final decision before the 61st day after grievance procedures are initiated, the employee may elect to:

1. Exhaust a district's grievance procedures, in which case the employee must sue not later than the 30th day after the date those procedures are exhausted to obtain relief under Government Code Chapter 554; or
2. Terminate district grievance procedures and sue within the timelines established by Government Code 554.005 and 554.006.

Gov't Code 554.005, 554.006 [See DGBA regarding grievance procedures]

Burden of Proof	If the employee brings a lawsuit, the employee has the burden of proof unless the suspension, termination, or adverse personnel action occurred within 90 days after the employee reported a violation of law, in which case the suspension, termination, or adverse personnel action is presumed, subject to rebuttal, to be because the employee made the report.
Affirmative Defense	It is an affirmative defense to a whistleblower suit that the district would have taken the action against the employee that forms the basis of the suit based solely on information, observation, or evidence that is not related to the fact that the employee made a report protected under the whistleblower law. *Gov't Code 554.004*
Notice of Rights	A board shall inform its employees of their rights regarding whistleblower protection by posting a sign in a prominent location in the workplace. The design and content of the sign shall be as prescribed by the attorney general. *Gov't Code 554.009*

Right to Report a Crime

A district employee may report a crime witnessed at the school to any peace officer with authority to investigate the crime. A district may not adopt a policy requiring a school employee to refrain from reporting a crime witnessed at the school or to report a crime witnessed at the school only to certain persons or peace officers. *Education Code 37.148*

Protection for Reporting Child Abuse

A district may not suspend or terminate the employment of, discriminate against, or take other adverse employment action against a professional employee who in good faith:

1. Reports child abuse or neglect to:
    a. The person's supervisor,
    b. An administrator of the facility where the person is employed,
    c. A state regulatory agency, or
    d. A law enforcement agency; or
2. Initiates or cooperates with an investigation or proceeding by a governmental entity relating to an allegation of child abuse or neglect.

"Adverse employment action" means an action that affects an employee's compensation, promotion, transfer, work assignment, or performance evaluation, or any other employment action that would dissuade a reasonable employee from making or supporting a report of abuse or neglect under Family Code 261.101.

A person may sue for injunctive relief, damages, or both if the person is suspended or terminated from the person's employment; is discriminated against; or suffers any other adverse employment action.

A district employee who has a cause of action under the provisions at Whistleblower Protection, above, may not bring an action under Protection for Reporting Child Abuse.

Family Code 261.110(a)-(c), (l)

Protection from Disciplinary Proceedings

For purposes of the following provisions, "disciplinary proceeding" means discharge or suspension of a professional employee, or termination or nonrenewal of a professional employee's term contract. [See DGC regarding immunity] *Education Code 22.0512(b)*

Reporting Child Abuse or Maltreatment

A district employee may not be subject to any disciplinary proceeding resulting from an action taken in compliance with Education Code 38.0041 [prevention of child abuse and other maltreatment, see FFG]. *Education Code 38.0041(g)*

Use of Physical Force

A professional employee may not be subject to disciplinary proceedings for the employee's use of physical force against a student to the extent justified under Penal Code 9.62. This provision does not prohibit a district from enforcing a policy relating to corporal punishment or bringing a disciplinary proceeding against a professional employee of the district who violates the district policy relating to corporal punishment. *Education Code 22.0512(a); Tex. Atty. Gen. Op. GA-0202 (2004)*

Penal Code 9.62 provides that the use of force, other than deadly force, against a person is justified:

1. If the actor is entrusted with the care, supervision, or administration of the person for a special purpose; and
2. When and to the degree the actor reasonably believes the force is necessary to further the special purpose or to maintain discipline in a group.

Penal Code 9.62

Failure to Follow Scope, Sequence, and Instructional Materials

A district may not penalize a teacher who does not follow the pacing of recommended or designated instructional materials or the pacing of the recommended or designated scope and sequence for a subject in the required curriculum under Education Code 28.002(a) in a particular grade level based on the teacher's determination that the teacher's students need more or less time in a specific area to demonstrate proficiency in the essential knowledge and skills for that subject and grade level [see EHAA].

A district may take appropriate action with respect to a teacher for conduct described above based on documented evidence of a deficiency in classroom instruction obtained through observation or substantiated and documented third-party information.

Education Code 28.0027(b), (c)

A classroom teacher employed by a district may not be subject to disciplinary proceedings for an allegation that the teacher violated Education Code 28.0022, the Establishment Clause of the First Amendment of the United States Constitution, or a related state or federal law if:

1. The teacher used only instructional material included on the list of approved instructional material maintained by the State Board of Education under Education Code 31.022 and adopted by the district; and

2. The allegation does not dispute that the teacher delivered instruction from the instructional material with fidelity.

This immunity is in addition to, and may not be construed to interfere with, any other immunity provided by law.

Education Code 22.05125

Instructional Materials and Technological Equipment

A board may not require an employee who acts in good faith to pay for instructional materials or technological equipment that is damaged, stolen, misplaced, or not returned. An employee may not waive this provision by contract or any other means.

Exception

A district may enter into a written agreement with an employee whereby the employee assumes financial responsibility for electronic instructional material or technological equipment usage off school property or outside of a school-sponsored event in consideration for the ability of the employee to use the electronic instructional material or technological equipment for personal business.

The written agreement shall be separate from the employee's contract of employment, if applicable, and shall clearly inform the employee of the amount of the financial responsibility and advise the employee to consider obtaining appropriate insurance. An employee may not be required to enter into such an agreement as a condition of employment.

Education Code 31.104(e); 19 TAC 66.107(c)

Controversial Topics

For any course or subject, including an innovative course, for a grade level from kindergarten through grade 12, a teacher may not be compelled to discuss a widely debated and currently controver-

sial issue of public policy or social affairs. *Education Code 28.0022(a)*

Note: For instructional requirements and prohibitions, including requirements for student discussion, see EMB.

Jury Duty

A district may not discharge, threaten to discharge, intimidate, or coerce any permanent employee because the employee serves as a juror or grand juror, or for the employee's attendance or scheduled attendance in connection with the service, in any court in the United States. An employee who is discharged, threatened with discharge, intimidated, or coerced is entitled to return to the same employment that the employee held when summoned for jury or grand jury service if the employee, as soon as practical after release from jury or grand jury service, gives the employer actual notice that the employee intends to return. *Civ. Prac. & Rem. Code 122.001*

A district may not discharge, discipline, reduce the salary of, or otherwise penalize or discriminate against a school district employee because of the employee's compliance with a summons to appear as a juror. For each regularly scheduled workday on which a nonsalaried employee serves in any phase of jury service, a school district shall pay the employee the employee's normal daily compensation [see DEC]. *Education Code 22.006(a), (b)*

Voting

A person commits an offense if, with respect to another person over whom the person has authority in the scope of employment, the person knowingly refuses to permit the other person to be absent from work on election day or while early voting is in process for the purpose of attending the polls to vote, or subjects or threatens to subject the other person to a penalty for attending the polls on election day or while early voting is in progress to vote. Penalty means a loss of wages or another benefit of employment.

It is an exception to the application of this provision that the person's conduct occurs in connection with an election in which the polls are open on election day or while early voting is in progress for voting for two consecutive hours outside of the voter's working hours.

Election Code 276.004

Breaks for Nursing Mothers

A district shall provide a reasonable break time for an employee to express breast milk for the employee's nursing child for one year after the child's birth each time the employee has need to express the milk.

A district shall provide a place, other than a bathroom, that is shielded from view and free from intrusion from coworkers and the public, which may be used by an employee to express breast milk.

A district shall not be required to compensate an employee receiving reasonable break time for any time spent during the workday for such purpose unless otherwise required by federal or state law or municipal ordinance.

Break time provided shall be considered hours worked if the employee is not completely relieved from duty during the entirety of the break.

A district that employs less than 50 employees is not subject to these requirements, if the requirements would impose an undue hardship by causing the district significant difficulty or expense when considered in relation to the size, financial resources, nature, or structure of the district.

This requirement does not preempt a state law or municipal ordinance that provides greater protections to employees.

29 U.S.C. 218d

Right to Express Breast Milk

A district employee is entitled to express breast milk at the employee's workplace. *Gov't Code 619.002*

The district shall develop a written policy on the expression of breast milk by employees under Government Code Chapter 619. The policy must state that the district shall support the practice of expressing breast milk and make reasonable accommodations for the needs of employees who express breast milk.

A district shall provide a reasonable amount of break time for an employee to express breast milk each time the employee has need to express the milk. The district shall provide a place, other than a multiple user bathroom, that is shielded from view and free from intrusion from other employees and the public where the employee can express breast milk.

A district may not suspend or terminate the employment of, or otherwise discriminate against, an employee because the employee has asserted the employee's rights under Government Code Chapter 619. Government Code Chapter 619 does not create a private or state cause of action against a district.

Gov't Code Ch. 619

Charitable Contributions

A board or a district employee may not directly or indirectly require or coerce any district employee to:

1. Make a contribution to a charitable organization or in response to a fund-raiser; or
2. Attend a meeting called for the purpose of soliciting charitable contributions.

A board or district employee may not directly or indirectly require or coerce any district employee to refrain from the same acts.

Education Code 22.011

Protection of Nurses

A district may not suspend, terminate, or otherwise discipline or discriminate against a nurse who refuses to engage in an act or omission relating to patient care that:

1. Would constitute grounds for reporting the nurse to the Board of Nurse Examiners under Occupations Code Chapter 301, Subchapter I;
2. Constitutes a minor incident, as defined at Occupations Code 301.419; or
3. Would violate Occupations Code Chapter 301 or a rule of the Board of Nurse Examiners, if the nurse notifies the district at the time of the refusal that this is the reason for refusing to engage in the act or omission.

Occupations Code 301.352(a)

Designated Time for Prayer

The board of trustees may adopt a policy requiring every campus of the district or school to provide students and employees with an opportunity to participate in a period of prayer and reading of the Bible or other religious text on each school day in accordance with this section. [See FNA]

Regardless of whether the board adopts a policy under Education Code 25.0823(a), this section does not prohibit a student or employee of the district or school from participating in prayer or reading the Bible or other religious text during a period of the school day that is not designated as a period of prayer and reading of the Bible or other religious text.

Education Code 25.0823(a),(g)

Right to Engage in Religious Speech or Prayer

The right of an employee of a school district or open-enrollment charter school to engage in religious speech or prayer while on duty may not be infringed on by the district or school or another state governmental entity, unless the infringement is necessary to further a compelling state interest; and narrowly tailored using the least restrictive means to achieve that compelling state interest. *Education Code 22.012*

Exemption from Instruction

A parent or person standing in parental relation is entitled to remove the parent's child from a class or other school activity that conflicts with the parent's religious or moral beliefs if the parent presents or delivers to the teacher of the parent's child a written statement authorizing the removal of the child from the class or other school activity.

A parent or person standing in parental relation is not entitled to remove the parent's child from a class or other school activity to avoid a test or to prevent the child from taking a subject for an entire semester. This provision does not exempt a child from satisfying grade level or graduation requirements in a manner acceptable to the district and the Texas Education Agency (TEA).

Education Code 26.002, .010

See also *Mahmoud v. Taylor*, 145 S.Ct. 2332 (2025) (holding that the introduction of certain public school instruction, without parental notice and an opportunity to opt out, would likely burden parents' right to free exercise of religion).

Instructional Requirements and Prohibitions

The following provisions under Education Code 28.0022(a) apply to any course or subject, including an innovative course, for a grade level from kindergarten through grade 12.

Controversial Topics

A teacher may not be compelled to discuss a widely debated and currently controversial issue of public policy or social affairs.

A teacher who chooses to discuss a topic described above shall explore that topic objectively and in a manner free from political bias.

Education Code 28.0022(a)(1)-(a)(2)

Sexual Orientation and Gender Identity

A district or district employee may not provide or allow a third party to provide instruction, guidance, activities, or programming regarding sexual orientation and gender identity to students enrolled in prekindergarten through 12th grade.

This provision may not be construed to:

1. Limit a student's ability to engage in speech or expressive conduct protected by the First Amendment, U.S. Constitution or by Section 8, Article I, Texas Constitution, that does not result in material disruption to school activities;
2. Limit the ability of a person who is authorized by the district to provide physical or mental health-related services to provide the services to a student, subject to any required parental consent; or

3. Prohibit an organization whose membership is restricted to one sex and whose mission does not advance a political or social agenda from meeting on a district campus.

Education Code 28.0043

Political Activism and Advocacy Participation

A district or teacher may not require, make part of a course, or award a grade or course credit, including extra credit, for a student's:

1. Work for, affiliation with, or service learning in association with any organization engaged in:
    a. Lobbying for legislation at the federal, state, or local level, if the student's duties involve directly or indirectly attempting to influence social or public policy or the outcome of legislation; or
    b. Social policy advocacy or public policy advocacy;
2. Political activism, lobbying, or efforts to persuade members of the legislative or executive branch at the federal, state, or local level to take specific actions by direct communication; or
3. Participation in any internship, practicum, or similar activity involving social policy advocacy or public policy advocacy.

Education Code 28.0022(a)(3)

The above provisions do not apply to a student's participation in:

1. Community charitable projects, such as building community gardens, volunteering at local food banks, or other service projects;
2. An internship or practicum:
    a. For which the student receives course credit under a career and technology education program or under the P-TECH program established under Education Code 29.553; and
    b. That does not involve the student directly engaging in lobbying, social policy advocacy, or public policy advocacy; or
3. A program that prepares the student for participation and leadership in this country's democratic process at the federal, state, or local level through the simulation of a governmental process, including the development of public policy.

Education Code 28.0022(b)

Concepts Prohibited

A teacher, administrator, or other employee of a district may not require or make part of a course inculcation in the concept that:

1. One race or sex is inherently superior to another race or sex;
2. An individual, by virtue of the individual's race or sex, is inherently racist, sexist, or oppressive, whether consciously or unconsciously;
3. An individual should be discriminated against or receive adverse treatment solely or partly because of the individual's race or sex;
4. An individual's moral character, standing, or worth is necessarily determined by the individual's race or sex;
5. An individual, by virtue of the individual's race or sex, bears responsibility, blame, or guilt for actions committed by other members of the same race or sex;
6. Meritocracy or traits such as a hard work ethic are racist or sexist or were created by members of a particular race to oppress members of another race;
7. The advent of slavery in the territory that is now the United States constituted the true founding of the United States; or
8. With respect to their relationship to American values, slavery and racism are anything other than deviations from, betrayals of, or failures to live up to the authentic founding principles of the United States, which include liberty and equality.

A teacher, administrator, or other employee of a district may not teach, instruct, or train any administrator, teacher, or staff member of a state agency, school district, or open-enrollment charter school to adopt a concept listed above.

A teacher, administrator, or other employee of a district may not require an understanding of The 1619 Project.

Education Code 28.0022(a)(4)

Student Discussion

A district may not implement, interpret, or enforce any rule in a manner that would result in the punishment of a student for reasonably discussing the concepts described above in school or during a school-sponsored activity or have a chilling effect on reasonable student discussions involving those concepts in school or during a school-sponsored activity. *Education Code 28.0022(d)*

Employee or Contractor Discipline Policy	A district shall adopt a policy and procedure for the appropriate discipline, including termination, or a district employee or contractor who intentionally or knowingly engages in or assigns to another person an act prohibited by Education Code 28.0022. The district shall provide a physical and electronic copy of the policy and procedure to each district employee or contractor. *Education Code 28.0022(h)*
Limitations on Statute	Education Code 28.0022 may not be construed as limiting the teaching of or instruction in the essential knowledge and skills adopted under Education Code Chapter 28, Subchapter A. Education Code 28.0022 does not create a private cause of action against a teacher, administrator, or other employee of a district. Education Code 28.0022 may not be construed as prohibiting a teacher employed by a district from directing a classroom activity that involves students communicating with an elected official so long as the district, school, or teacher does not influence the content of a student's communication. *Education Code 28.0022(e)-(g)*

Mandatory Removal by a Teacher

A teacher shall remove from class and send to the principal for placement in a disciplinary alternative education program (DAEP) or expulsion, as appropriate, a student who engages in conduct described in Education Code 37.006 (removal) or 37.007 (expulsion). [See FOC and FOD] *Education Code 37.002(d)*

Routine Referral

A teacher may send a student to the campus behavior coordinator's (CBC) office to maintain effective discipline in the classroom. The CBC shall respond by employing appropriate discipline management techniques, consistent with the Student Code of Conduct that can reasonably be expected to improve the student's behavior before returning the student to the classroom. If the student's behavior does not improve, the CBC shall employ alternative discipline management techniques, including any progressive interventions designated as the responsibility of the CBC in the Student Code of Conduct. *Education Code 37.002(a)* [See FO]

Discretionary Removal

A teacher may remove from class a student who:

1. Repeatedly interferes with the teacher's ability to communicate effectively with the students in the class or with the ability of the student's classmates to learn;
2. Demonstrates behavior that is unruly, disruptive, or abusive toward the teacher, another adult, or another student; or
3. Engages in conduct that constitutes bullying, as defined by Education Code 37.0832 [see FFI].

Education Code 37.002(b)

Subject to requirements related to teaching and discussing certain debated and controversial topics under Education Code 28.0022(a)(2) and (d) [see EMB], a teacher may remove a student from class based on a single incident of behavior described above. *Education Code 37.002(b-3)*

Reporting Classroom Removals

A student who is sent to the campus behavior coordinator's or other administrator's office under a routine referral or a discretionary removal, as described above, is not considered to have been removed from the classroom for the purposes of reporting data through the Public Education Information Management System (PEIMS) or other similar reports required by state or federal law. *Education Code 37.002(e)*

[See DNA for information about teacher evaluations and disciplinary referrals.]

A teacher, campus behavior coordinator, or other appropriate administrator shall notify a parent of a student of the removal of a student from class described above. *Education Code 37.002(b-2)*

Placement of Student

If a teacher removes a student from class under the provisions above, the principal may place the student in another appropriate classroom, in-school suspension, or DAEP [see FOC]. *Education Code 37.002(c)*

Conference by Third Day Required

Not later than the third class day after the day on which a student is removed from class by the teacher under the above provision or by the school principal or other appropriate administrator under the Student Code of Conduct, the campus behavior coordinator or other appropriate administrator shall schedule a conference among the campus behavior coordinator or other appropriate administrator, a parent or guardian of the student, the teacher removing the student from class, if any, and the student. At the conference, the student is entitled to written or oral notice of the reasons for the removal, an explanation of the basis for the removal, and an opportunity to respond to the reasons for the removal. The student may not be returned to the regular classroom pending the conference. Following the conference, and whether or not each requested person is in attendance after valid attempts to require the person's attendance, the campus behavior coordinator, after consideration of the mitigating factors (see below), shall order the placement of the student for a period consistent with the Student Code of Conduct. *Education Code 37.009(a)*

Appeals

Appeal of Removal

A student may appeal the student's removal from class described above to:

1. The school's placement review committee [see Placement Review Committee, below]; or
2. The campus's threat assessment and safe and supportive school team, in accordance with a district policy providing for such an appeal to be made to the team.

Education Code 37.002(e-1)

No Appeal of Board Decision

If district policy allows a student to appeal to the board or the board's designee, a decision of the campus behavior coordinator or other appropriate administrator, other than an expulsion under Section 37.007, the decision of the board or the board's designee is final and may not be appealed. *Education Code 37.009(a)*

Placement Length

The period of the placement may not exceed one year unless, after a review, the district determines that the student is a threat to the safety of other students or to district employees. The student may

not be returned to the regular class pending the required conference. *Education Code 37.009(a)*

Mitigating Factors

The CBC must consider whether the student acted in self-defense, the intent or lack of intent at the time the student engaged in the conduct, the student's disciplinary history, and whether the student has a disability that substantially impairs the student's capacity to appreciate the wrongfulness of the student's conduct. *Education Code 37.009(a)*

[See Student Code of Conduct, item 4, at FO(LEGAL) for mitigating factors.]

Prohibitions on Activities

The terms of the removal may prohibit the student from attending or participating in school-sponsored or school-related activities. *Education Code 37.002(c)*

Note: A power granted to a campus principal under Education Code Chapter 37, Subchapter A may be exercised by the CBC.

Return to Class

The principal may not return the student to the class of the teacher who removed the student without the teacher's written consent, unless the placement review committee determines that such placement is the best or only alternative available and, not later than the third class day after the day on which the student was removed from class, a conference in which the teacher has been provided an opportunity to participate has been held. [See Conference by Third Day Required, above]

Return to Class Plan

The principal may not return the student to that teacher's class unless the teacher provides written consent for the student's return or a return to class plan has been prepared for that student. The principal may only designate an employee of the school whose primary duties do not include classroom instruction to create a return to class plan. A return to class plan must be created before or at the conference described by that subsection. A plan created before the conference must be discussed at the conference.

The commissioner of education shall adopt a model return to class plan for use by a district in creating a return to class plan for a student.

Education Code 37.002(c), (c-1), (c-2)

Return After Assault

If the teacher removed the student from class because the student engaged in the elements of an offense listed in Education Code 37.007(a)(2)(A) or (a)(4) (assault, sexual assault, assault against a district employee or volunteer) against the teacher, the student

may not be returned to the teacher's class without the teacher's written consent. The teacher may not be coerced to consent.

Education Code 37.002(c), (d)

Placement Review Committee

Each school shall establish a three-member committee to determine the placement of a student when a teacher refuses the return of a student to the teacher's class. The committee shall make recommendations to the district regarding readmission of expelled students.

Composition

Committee members shall be appointed as follows:

1. Campus faculty shall choose two teachers to serve as members and one teacher to serve as an alternate member; and
2. The principal shall choose one member from the professional staff of a campus.

The teacher refusing to readmit the student may not serve on the committee.

Education Code 37.003

Right to Appeal

The principal, campus behavior coordinator, or other appropriate administrator shall notify a student who has been removed from class and the student's parent of the student's right to appeal the decision of the committee. [See Appeals, above] *Education Code 37.002(f-1)*

Removal by School Bus Driver

The driver of a school bus transporting students to or from school or a school-sponsored or school-related activity may send a student to the principal's office to maintain effective discipline on the school bus.

The principal shall respond by employing appropriate discipline management techniques consistent with the Student Code of Conduct.

Education Code 37.0022

Note: See FOF for provisions concerning students with disabilities.
